iMedConsent by Dialog Medical

Content Administrator's Guide

v3.81

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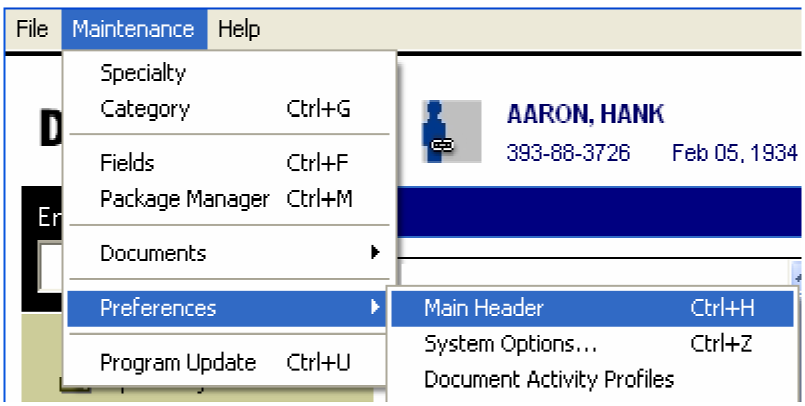
Table of Contents

The purpose of this document is to provide instructions on managing and editing the content in iMedConsent. To perform any of the following functions, you must be set up in security as an Administrator.

How do I Edit the Header?

The following are instructions for editing the header, which displays the facility name and address at the top of the consents and other documents (with the exception of Drug Information documents) in iMedConsent.

1. From the toolbar, select Maintenance -> Preferences -> Main Header

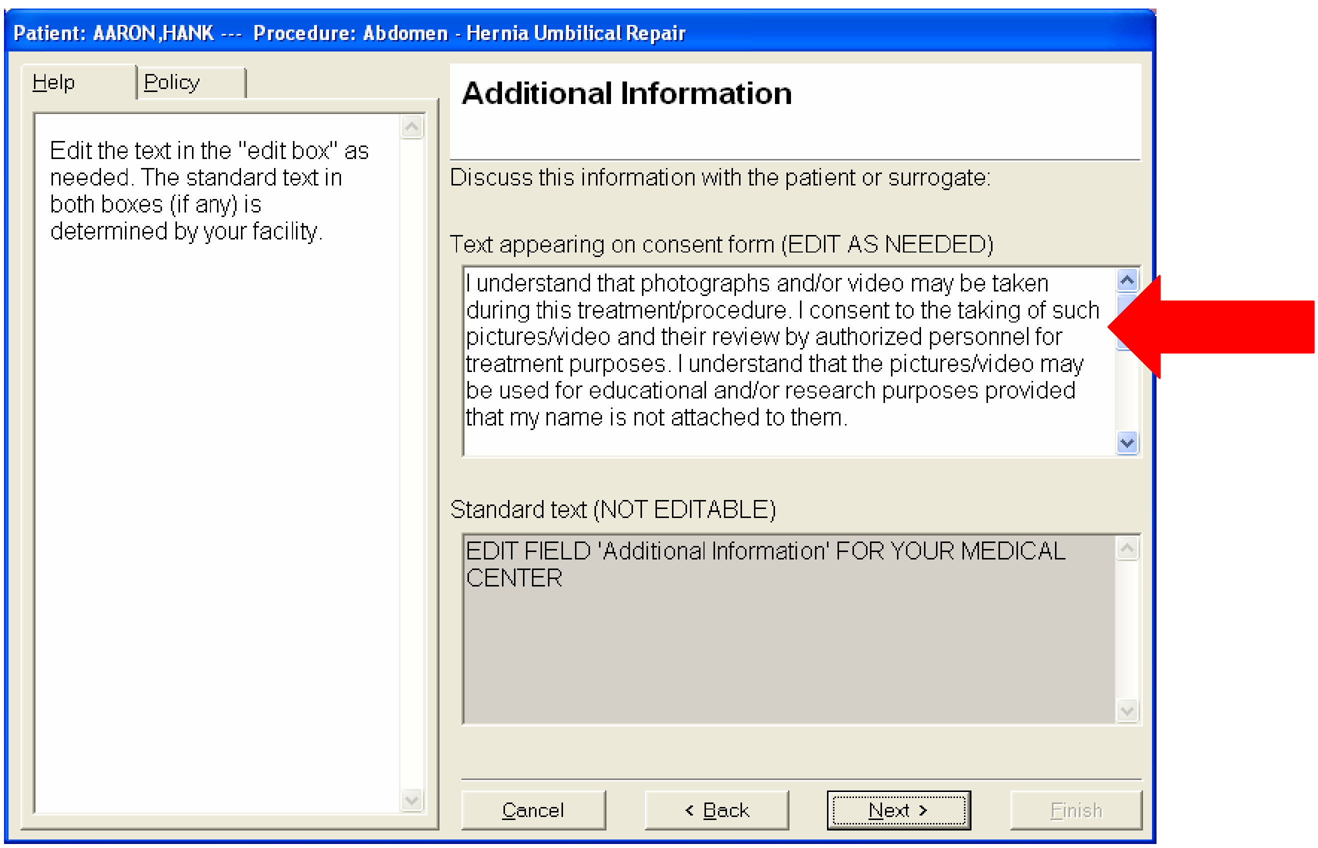


2. The following screen appears:

3. After making your changes, click OK. Your changes have been saved.

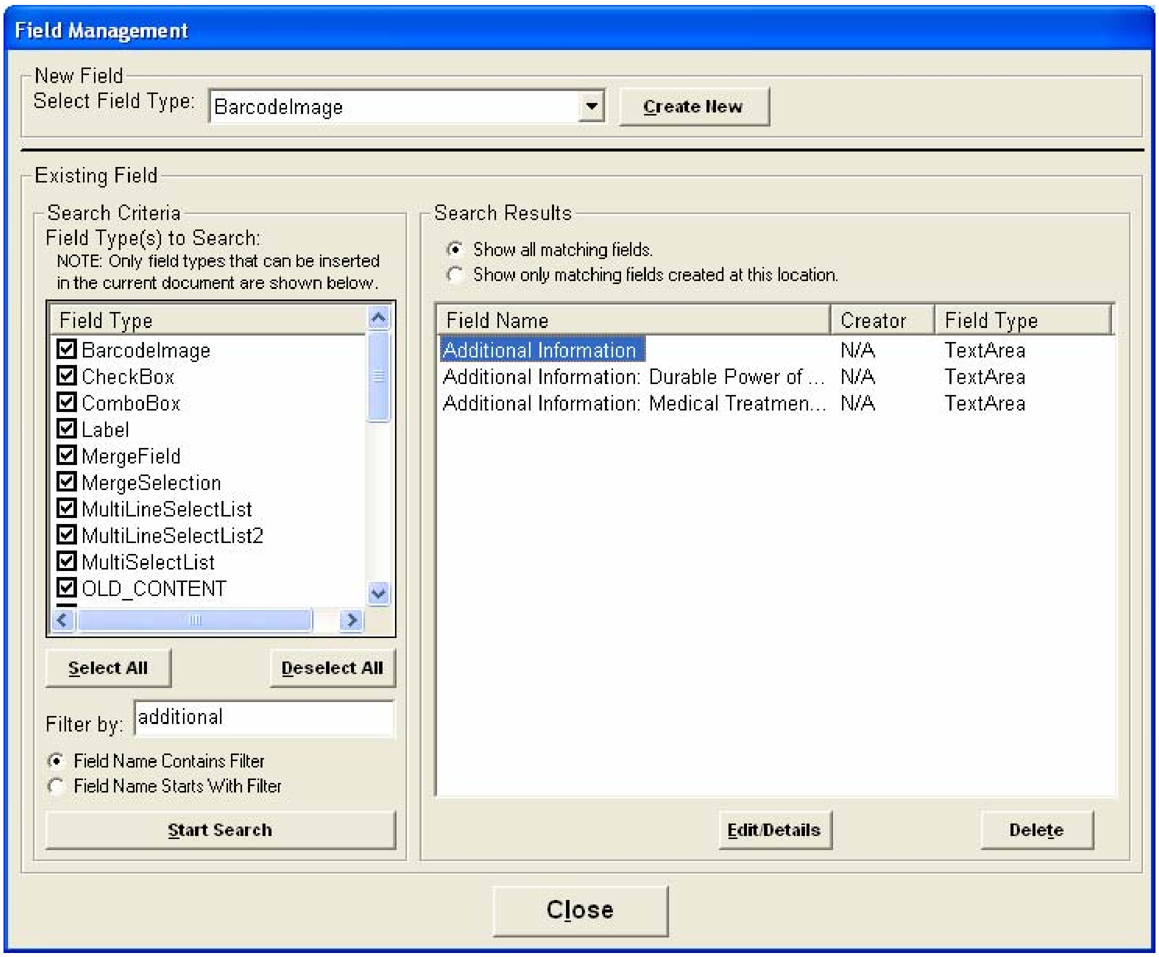
How Do I Edit the Additional Information Screen?

The Additional Information screen (item #17 on the completed consent screen) may be customized by the administrator and may be edited by the end user. Many VA sites are using this field to add information about pictures, videos, and vendor participation in surgery. Text added here will appear on all consents, but may be edited by the end user under the Edit Options section once you have prepared the consent.

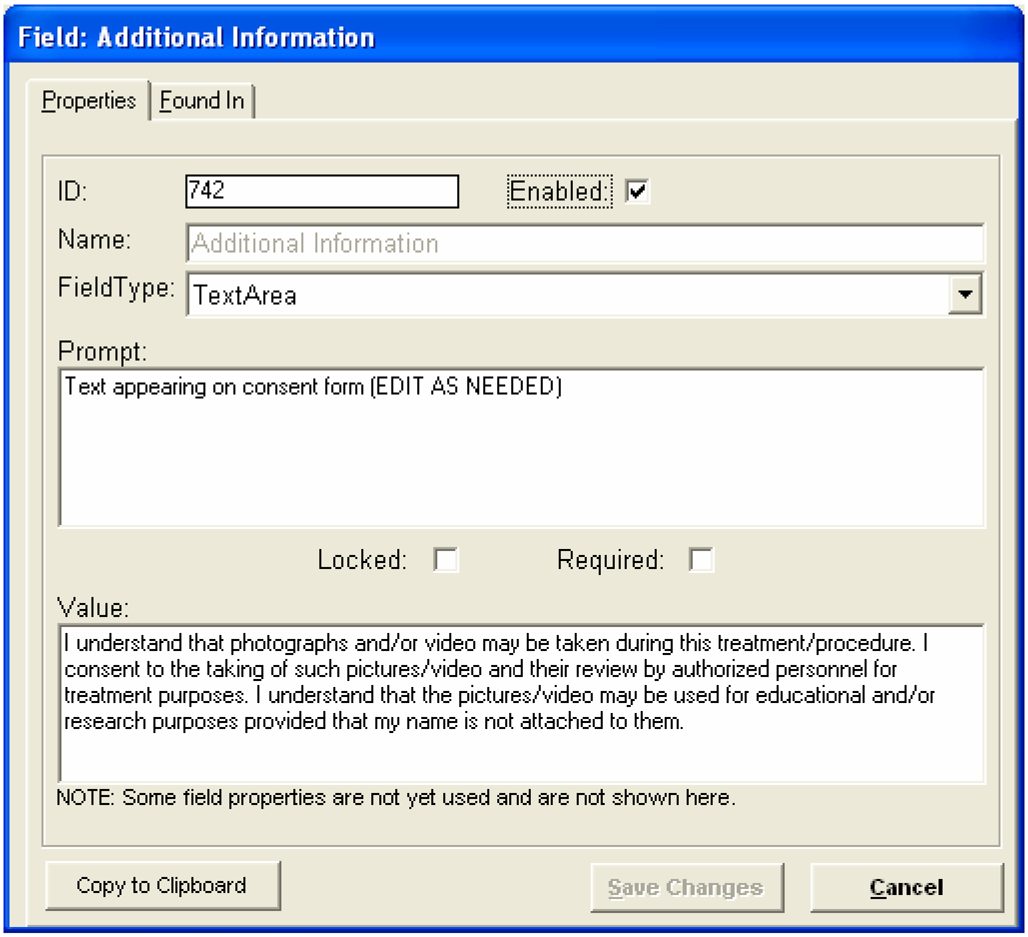


To edit the "Additional Information" field, follow these steps:

1. From the Toolbar, select Maintenance -> Fields
2. When the Field Management screen opens, type **Additional** in the "Filter by" box. Next, click the "Select All" button and click Start Search.



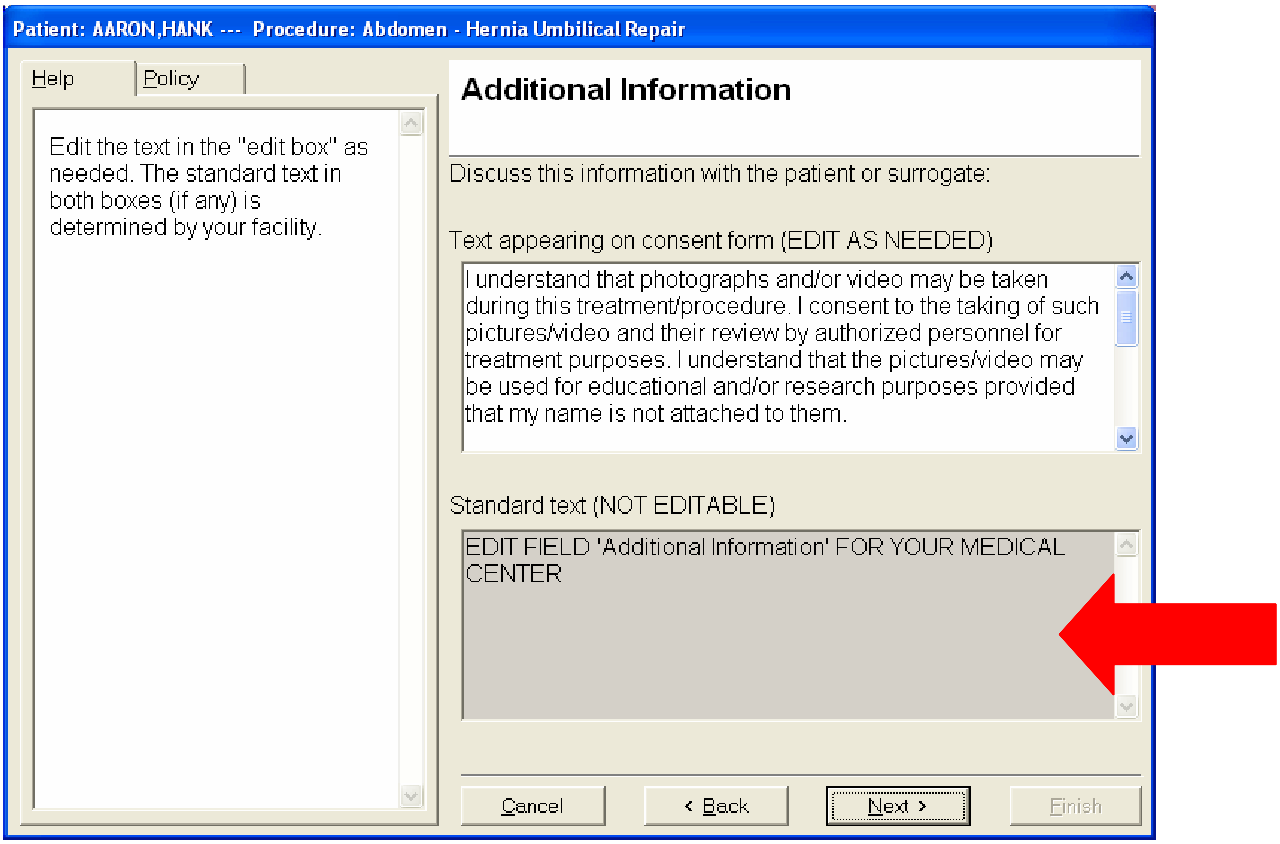
3. Your Search Results will bring back the "Additional Information" field.
4. Click the field to highlight it and click Edit/Details button.



5. Click your mouse inside the Value box and make your changes. When you are finished, click the Save Changes button.

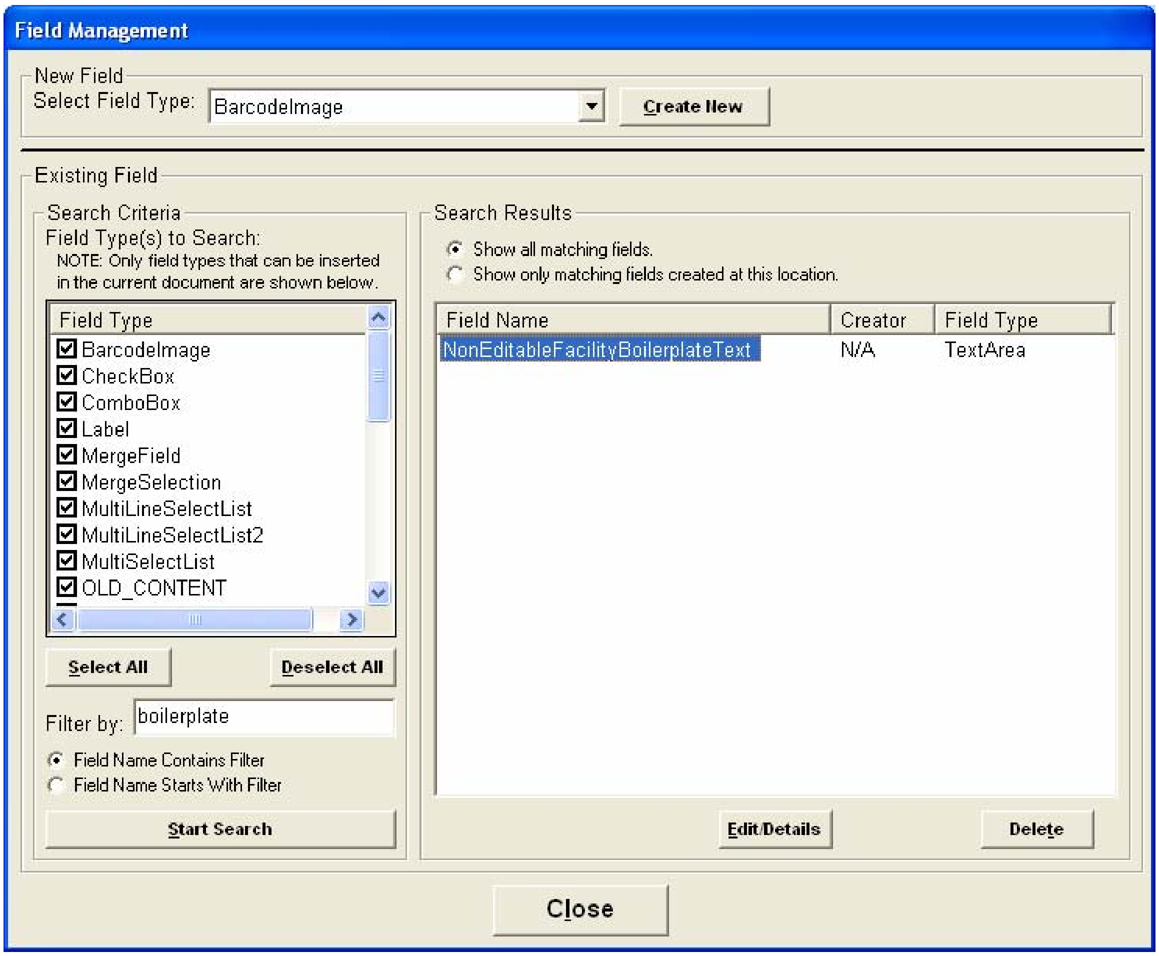
As an administrator, you may customize the box called "Standard text (Not Editable)" that appears on the Additional Information screen if you are using a Step by Step consent, or item #17 if you are looking at a completed consent.

This field can be used for information you want to appear on the consent that is specific to your VA facility. The box is "grayed out" because it is not editable to the end user. Whatever text you place here will appear on all consents at your facility.

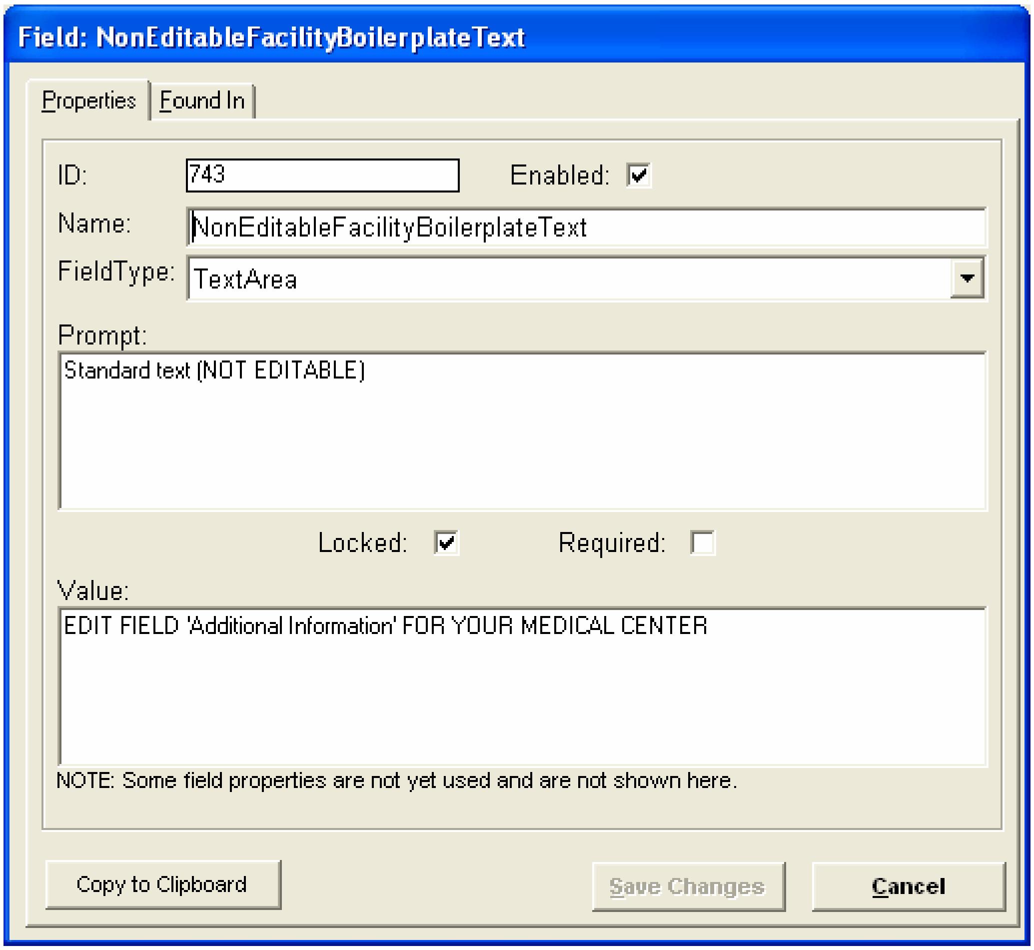


To edit the "NonEditableBoilerplatetext" field, follow these steps:

1. From the toolbar, click Maintenance menu, and select Fields.
2. When the Field Management screen opens, type **boilerplate** in the "Filter by" box. Next, click the "Select All" button and click Start Search.



3. Your Search Results will bring back the "NonEditableFacility BoilerplateText" field.
4. Highlight field and then click the Edit/Details button.



5. Click your mouse inside the Value box and make your changes. When you are finished, click the Save Changes button.

How Do I Edit Non-Consent Documents?

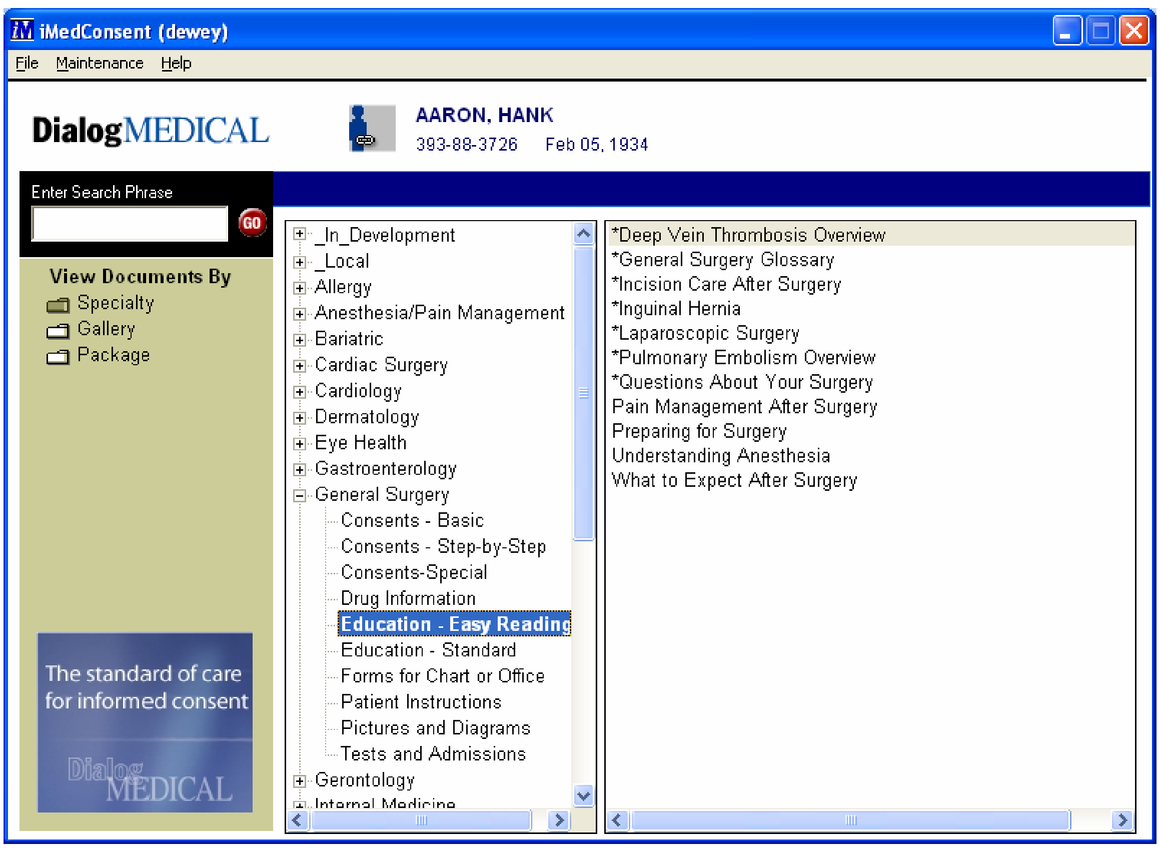
Currently, only the administrator may make permanent changes to the following documents:

- Education (Easy Reading and Standard)
- Patient Instructions
- Tests and Admissions

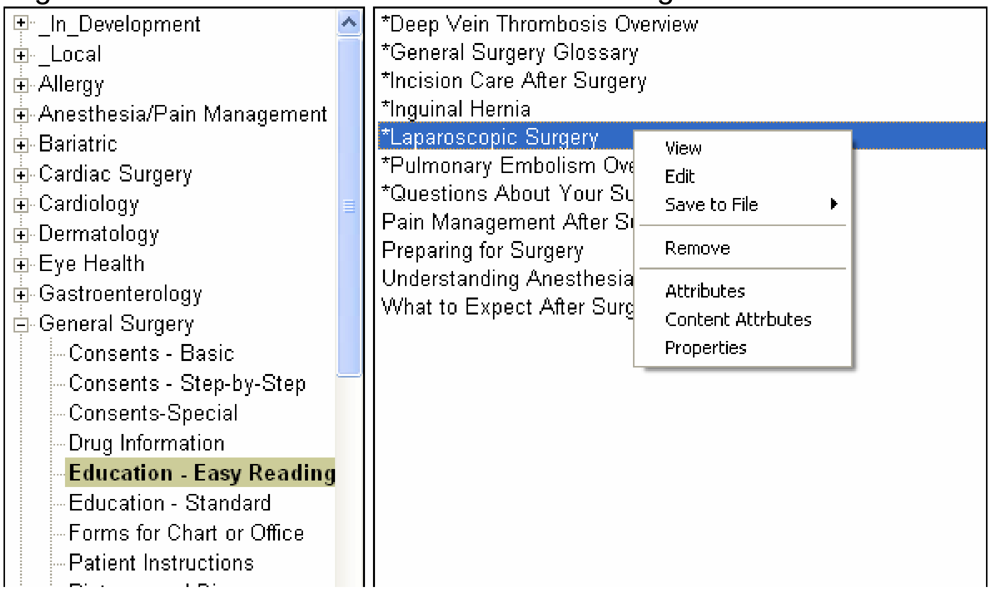
You may <u>not</u> make permanent changes to the consent templates, but you may make changes to the consents on a per-consent basis.

The following example shows editing a document under General Surgery -> Patient Education – Easy Reading.

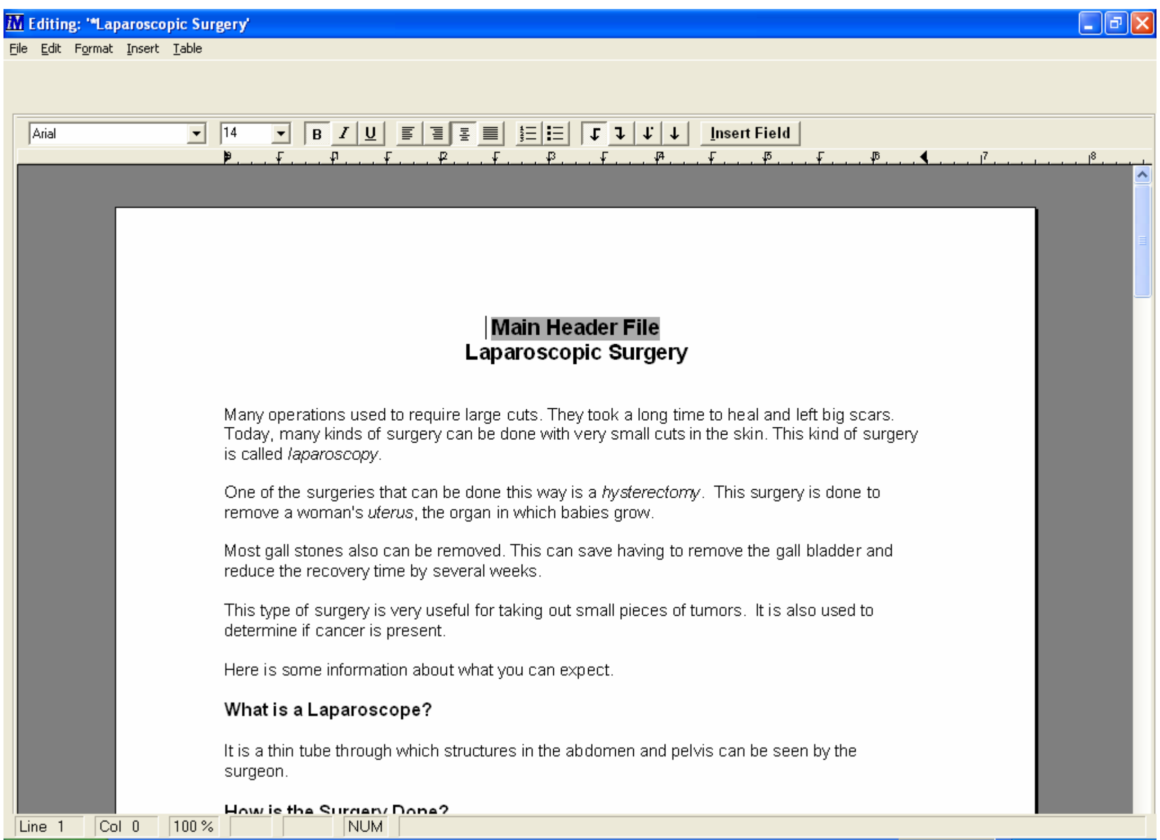
1. Open iMedConsent and go to the category Education – Easy Reading under the specialty.



2. Right click on the document in the list on the right and click Edit.



3. The document will open.



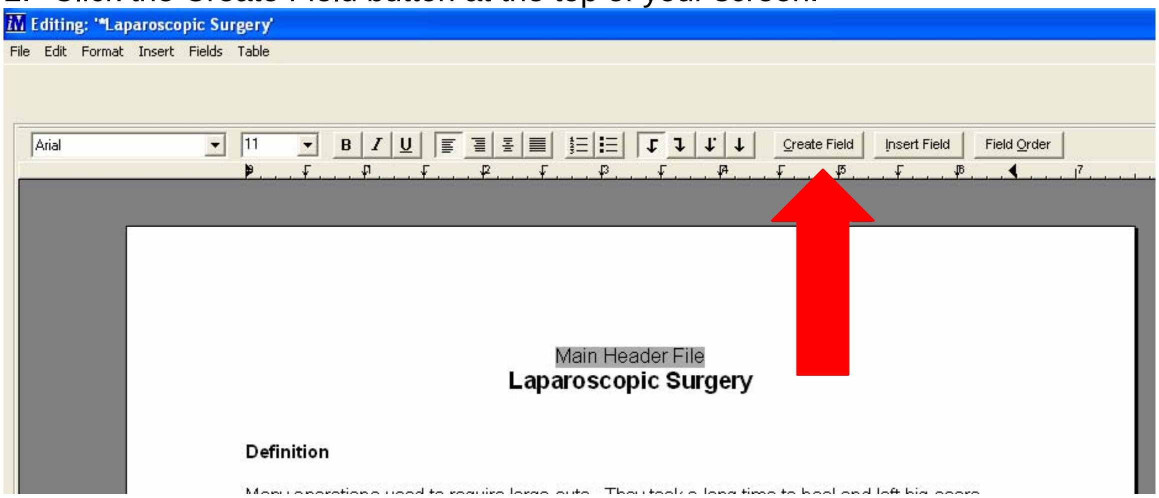
4. Make your changes to the document as you would in a Microsoft Word document. Then click File ->Save.

How Do I Create a Signature Field?

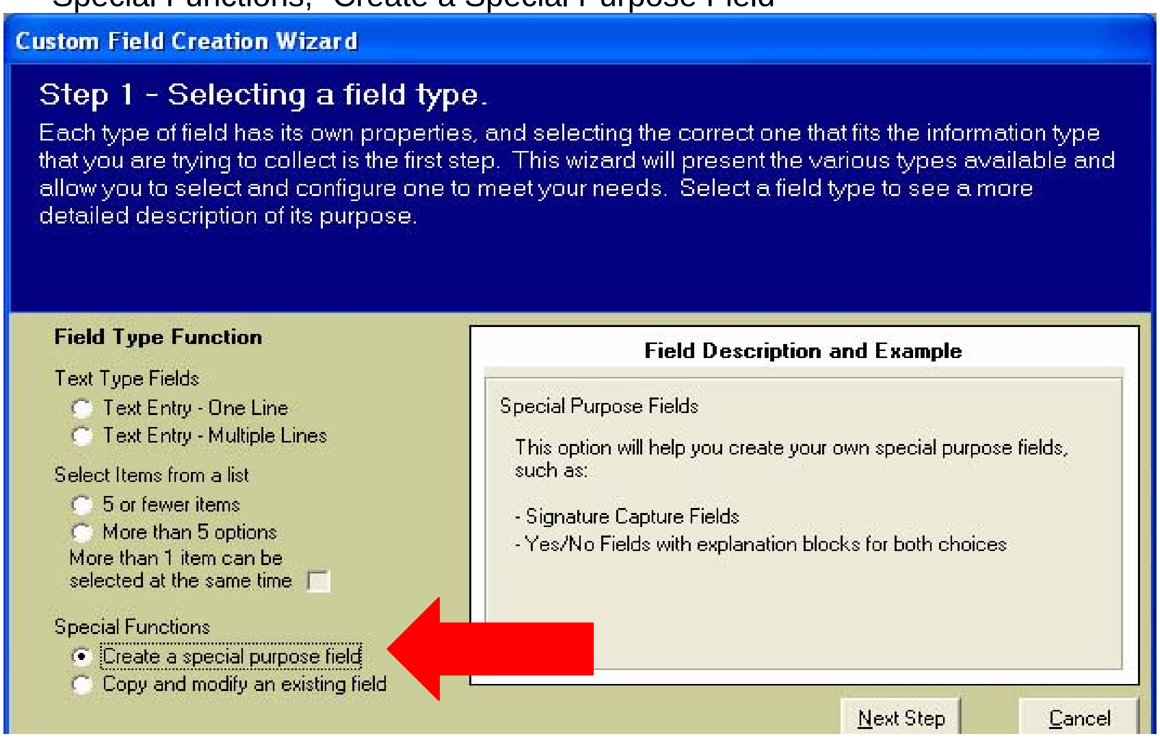
Some facilities want to capture patient and/or witness signatures on their education and other non-consent documents. Administrators may add a signature field to new and existing non-consent documents. Here are the steps:

1. Open your document by right clicking and select Edit.

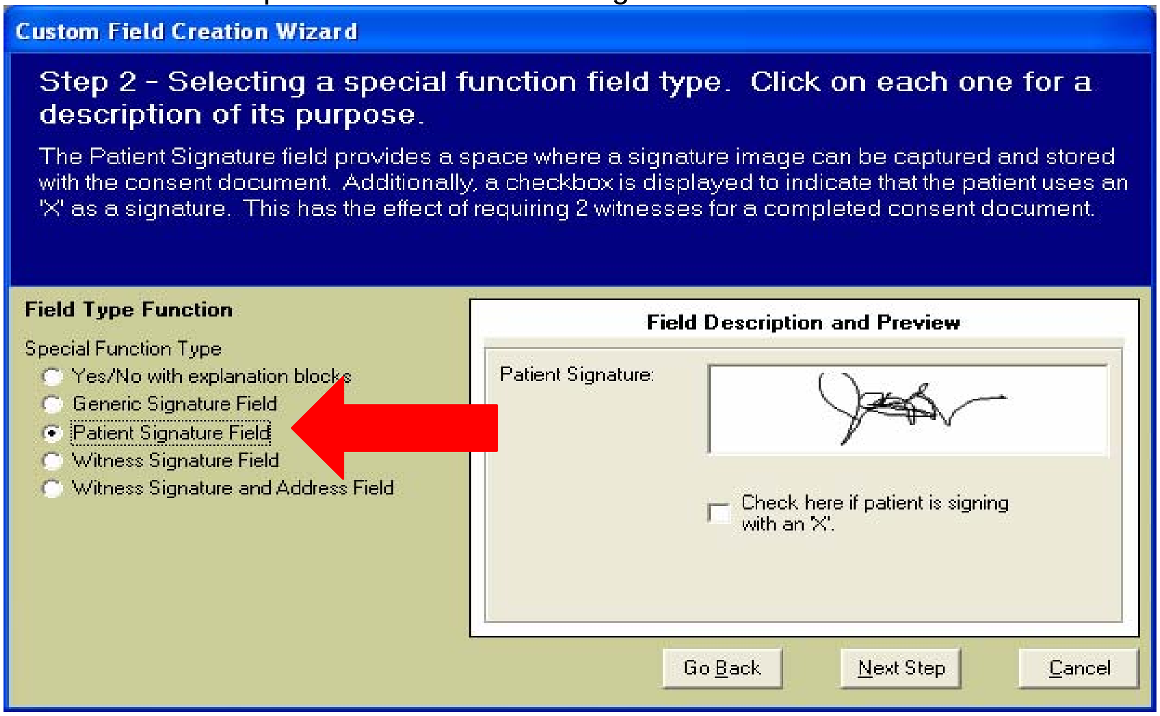
2. Click the Create Field button at the top of your screen.



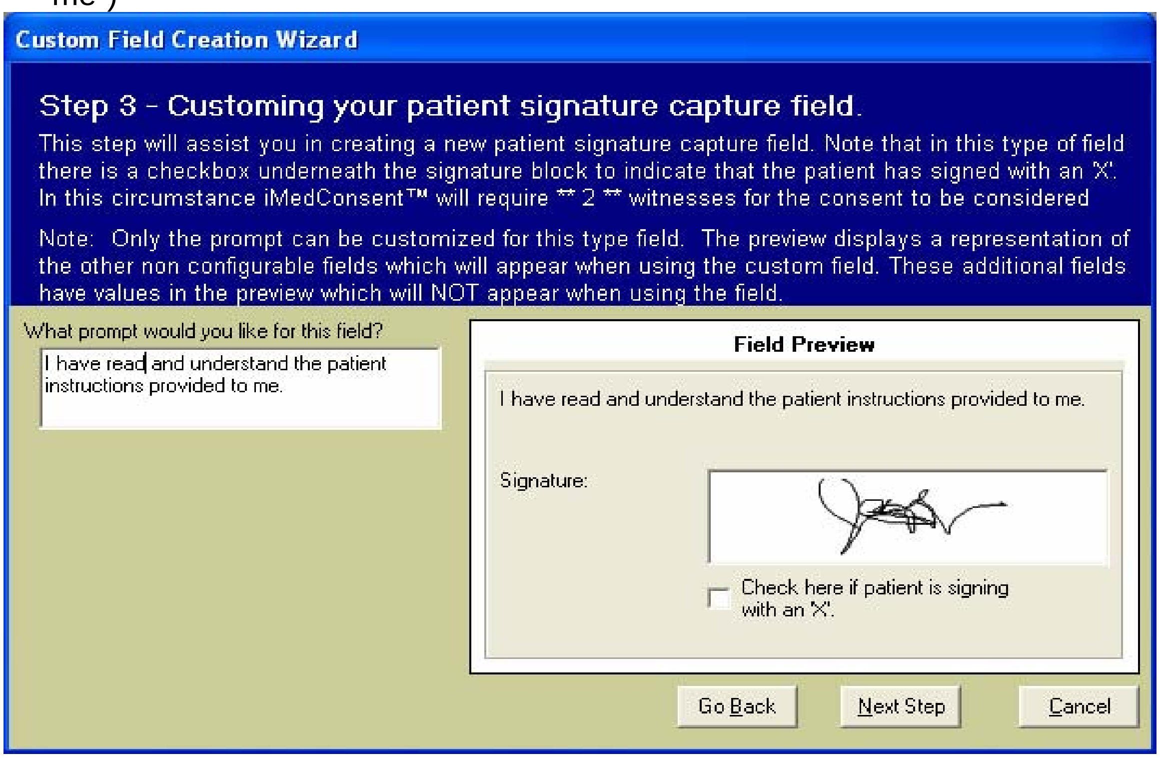
3. The Custom Field Creation Wizard will open. Click the radio button under Special Functions, "Create a Special Purpose Field"



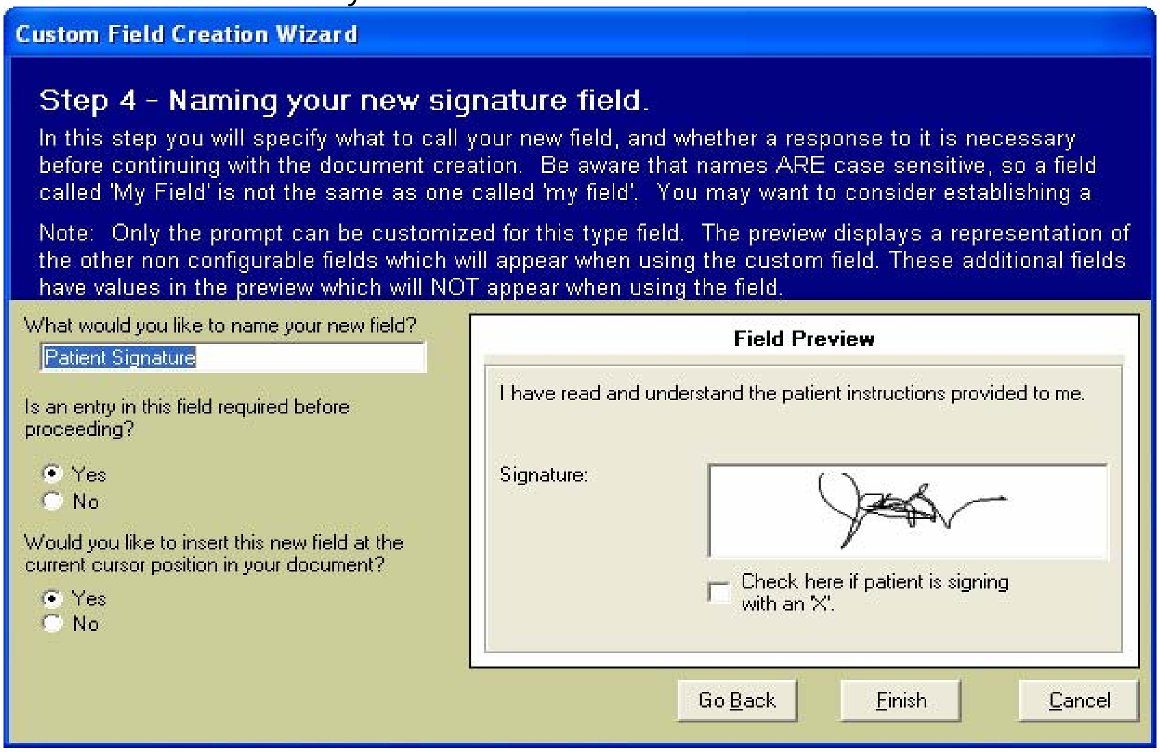
4. Click "Next Step" and select "Patient Signature Field"



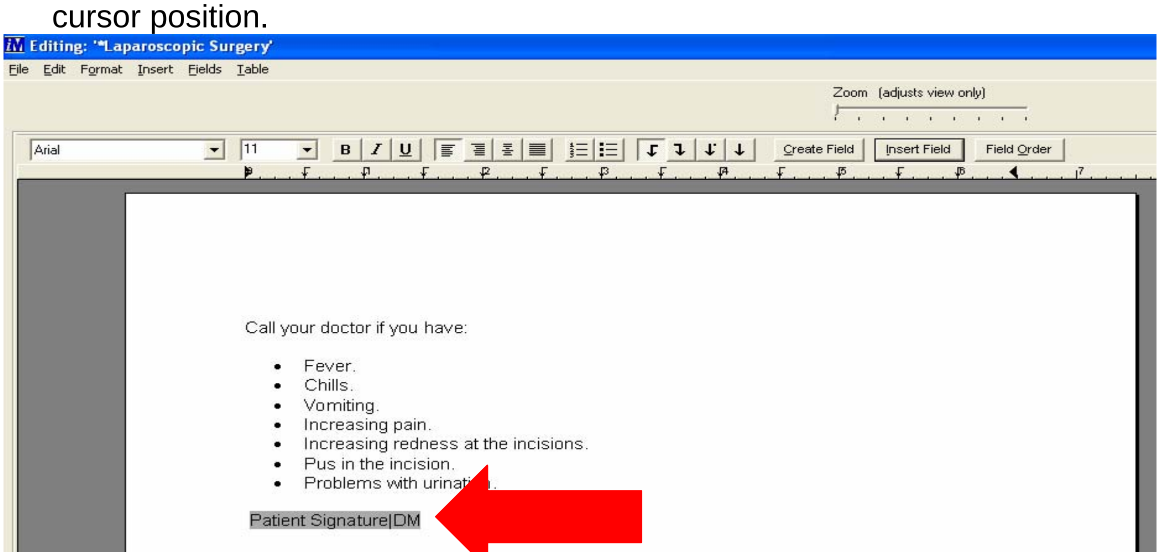
5. Click "Next Step" and customize the text that will appear above the patient's signature. (Example: "I have read and understand the instructions provided to me")



6. Click "Next Step" and follow the instructions on the screen. First, you will name your new field. You may choose to enter the field into the document now or add it later. You may reuse this field in other non-consent documents.



7. Click Finish and the new field will appear in your document at the current cursor position.



8. When you are finished make sure to click File -> Save!!

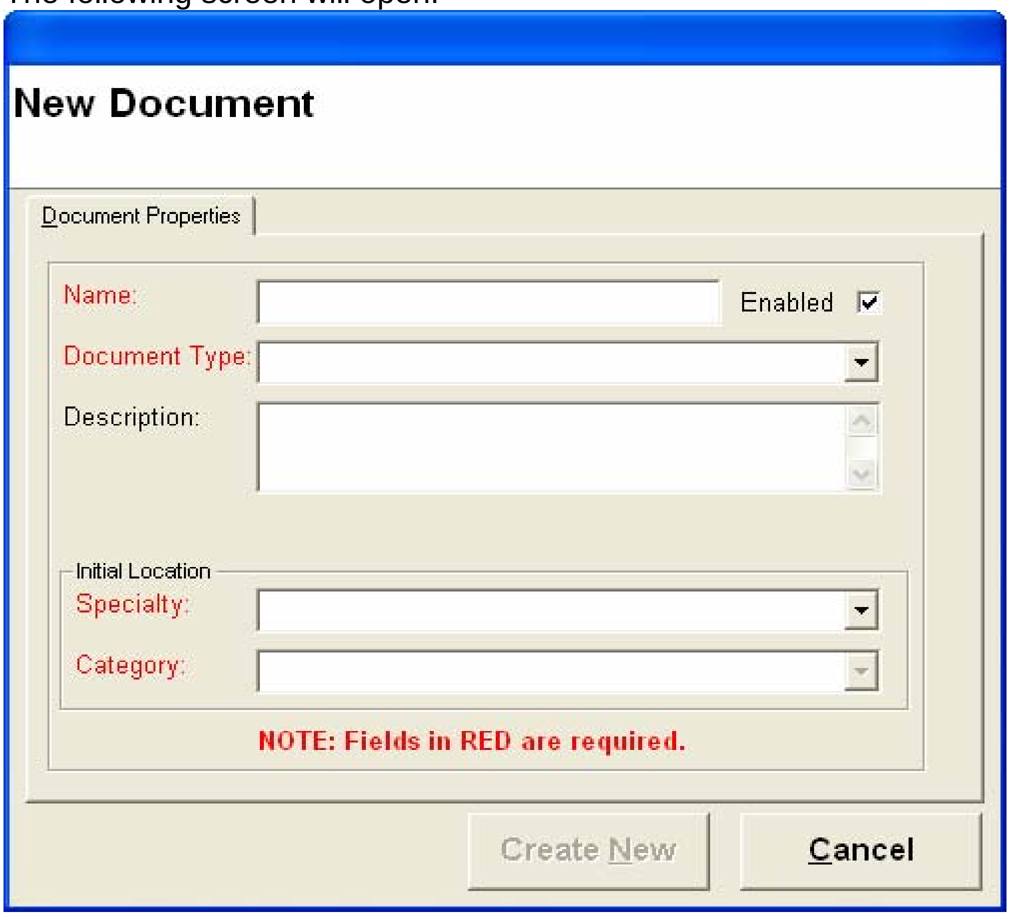
TIP: You may want to type in the words "Patient Signature" above the field. You may also insert the field "patient name" underneath the signature field so it prints the name of the patient automatically.

How Do I Create a Local Consent?

You may create consents for procedures NOT included in the iMedConsent library. Once a procedure has been added to the national library, you must stop using the local version and start using the national one. To create a local consent, follow these steps:

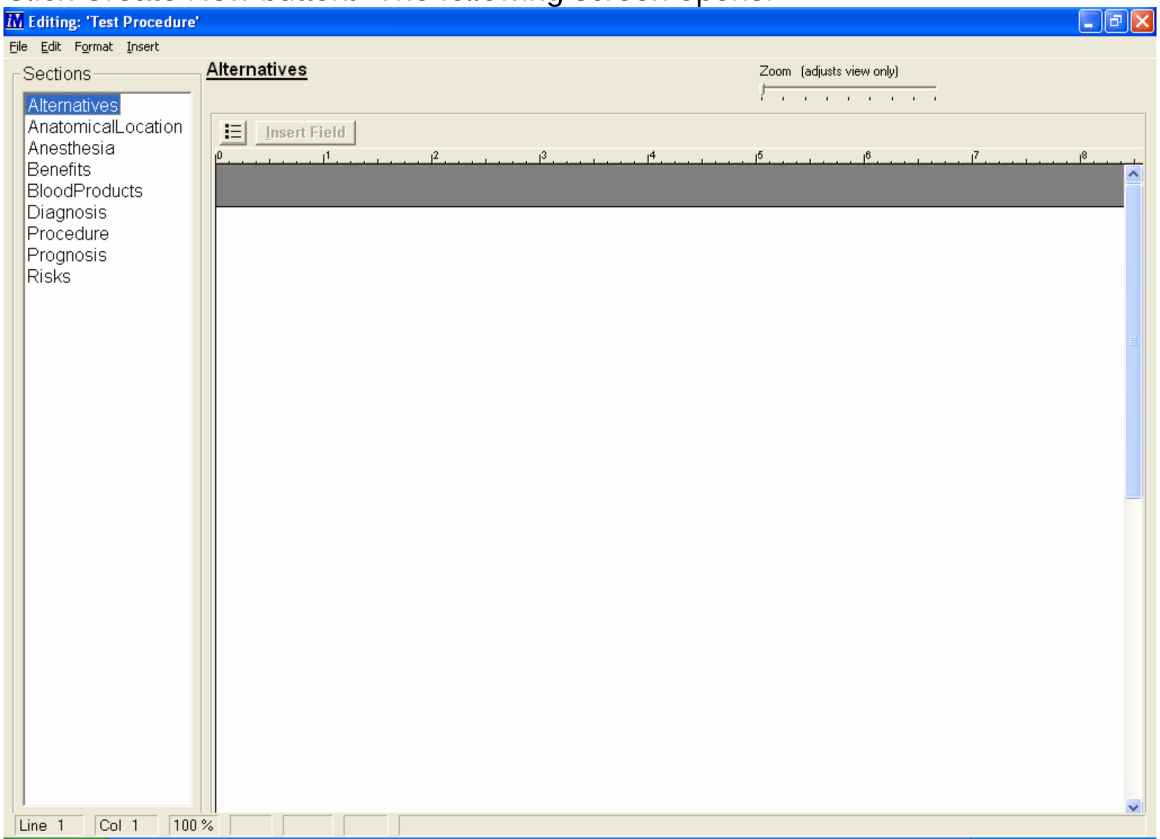
1. From the toolbar, Click File ->New

2. The following screen will open:



3. Complete fields.
   - Name - type in the name of the procedure
   - Document Type - select **Child** from dropdown list
   - Description – put your initials and date of creation as a reference (you can also add requesting physicians name)
   - Specialty - select the specialty you want to procedure stored under
   - Category – select the default (Consents basic and step-by-step)

4. Click Create New button. The following screen opens:



5. The various sections of the consent are on the left side of the screen. The first one on the list is Alternatives. Type the text for Alternatives in the white text area. You may add bullets and insert fields as necessary. You may also cut and paste from another document.

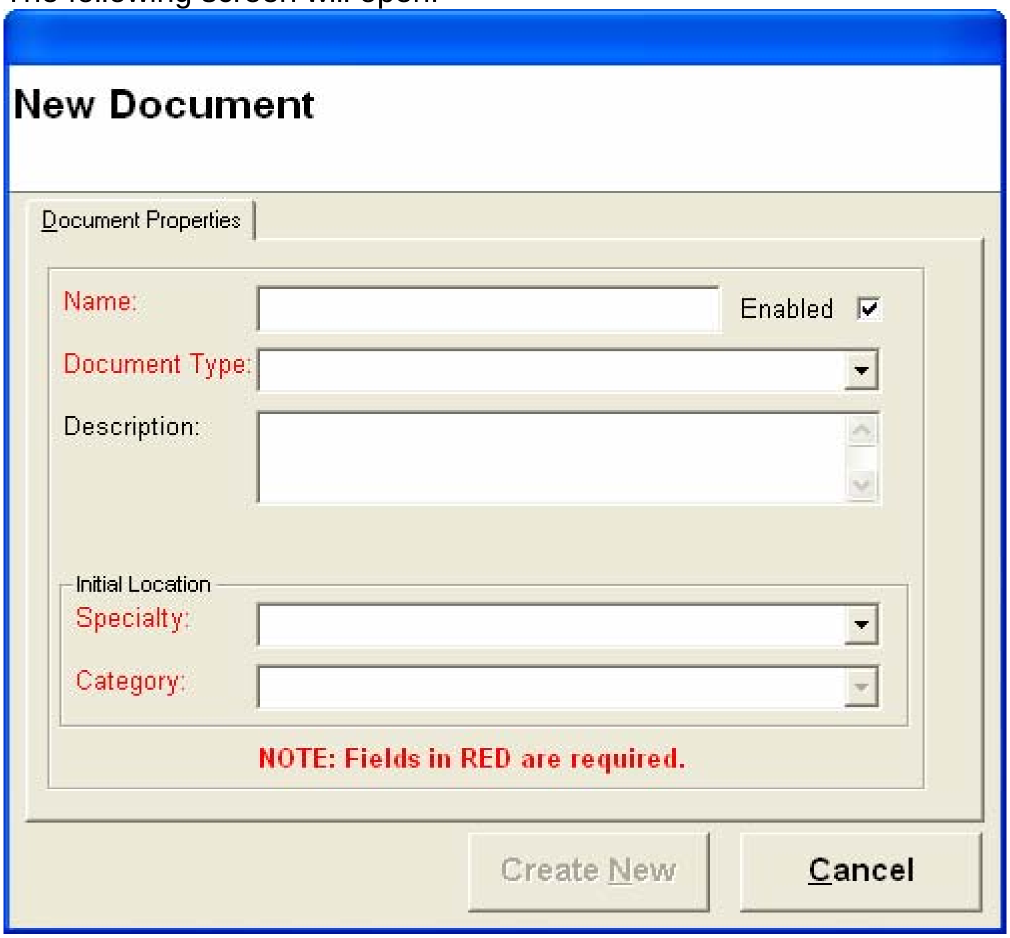
6. Continue filling out the text for each section. When you have finished, click File -> Save. This will save your consent and add it to the library.

How Do I Create a New Document (Non-Consent)?

There may be instances when you will want to add non-consent documents (such as your local forms or new educational documents) to the library in iMedConsent.

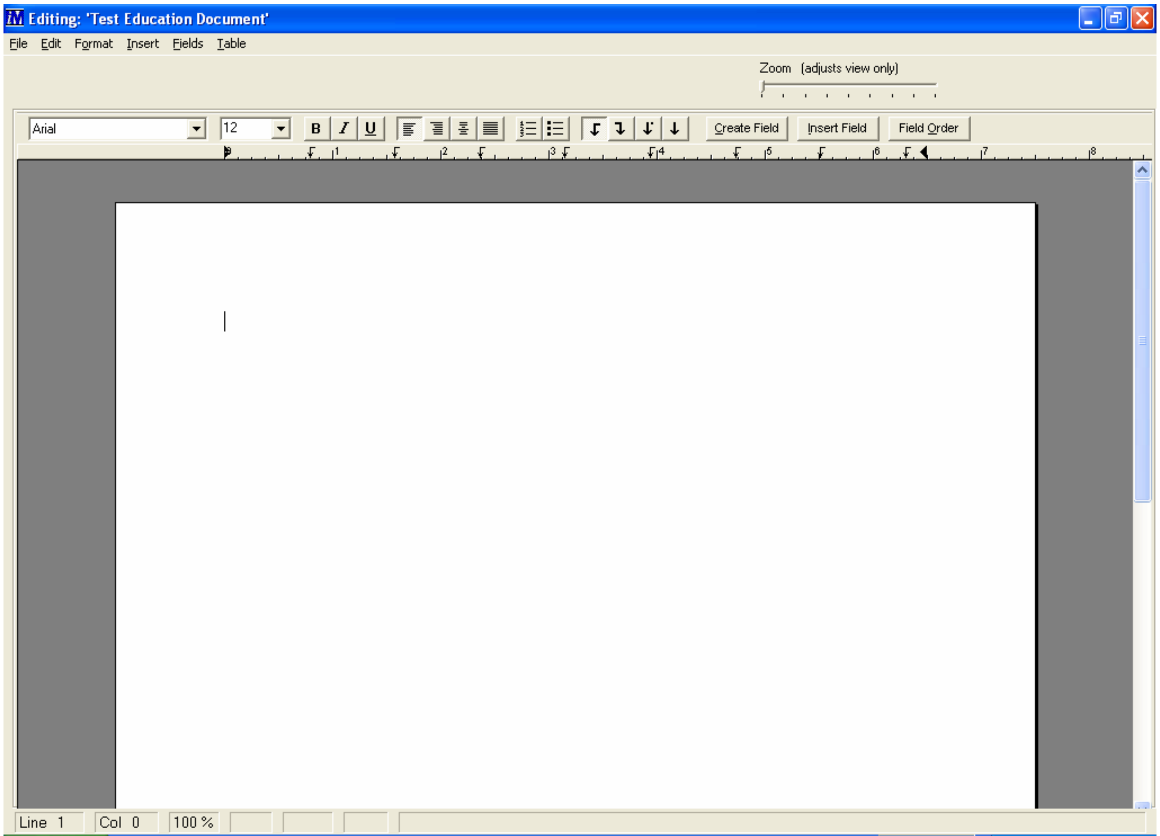
To add a new document, follow these steps:

1. Open iMedConsent. From the toolbar, Click File ->New
2. The following screen will open:



3. Complete the fields in red.
    - Name – type in the name of your form
    - Document Type – select **Normal** from the dropdown list
    - Description - put your initials and date of creation as a reference
    - Specialty – select the specialty you want the form stored under
    - Category – select the category you want the form stored in under the specialty

4. Click Create New button. The following screen opens:

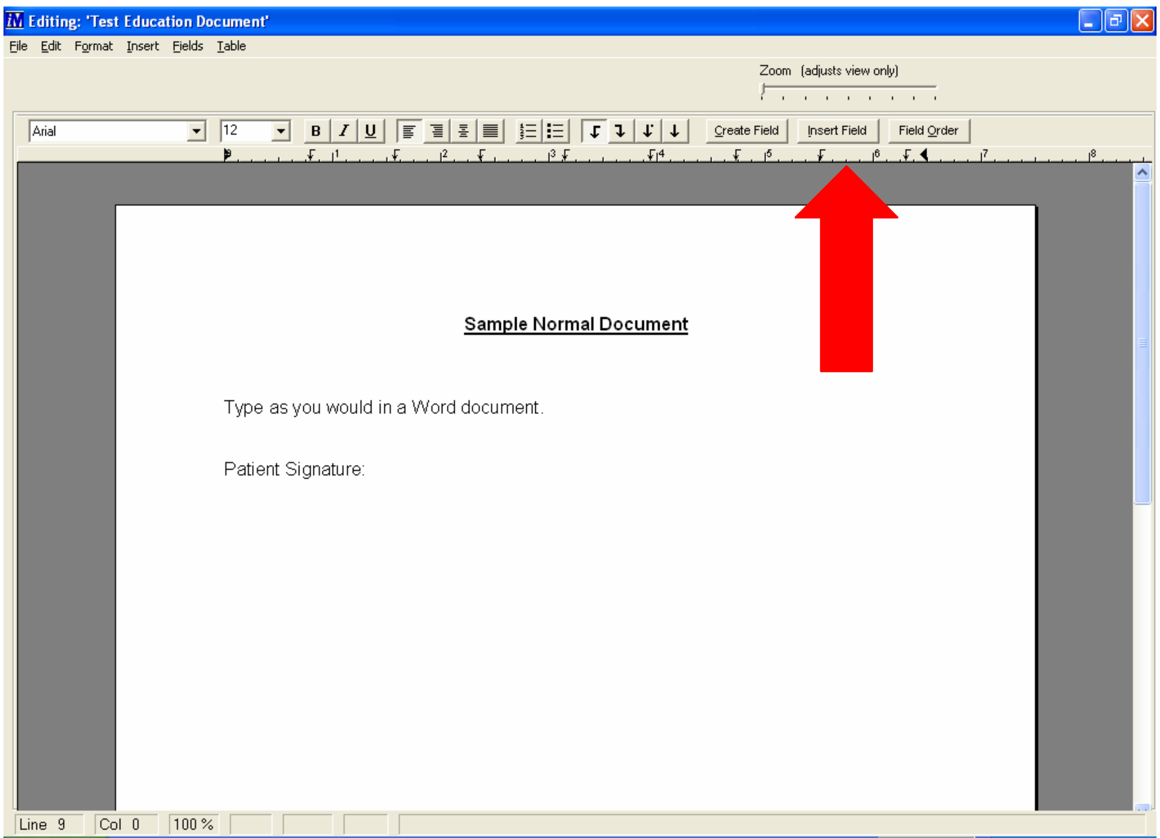


5. Type as you would in a Word document or you may cut and paste from another document. When you have finished, click File -> Save. This will save your document and add it to the library.

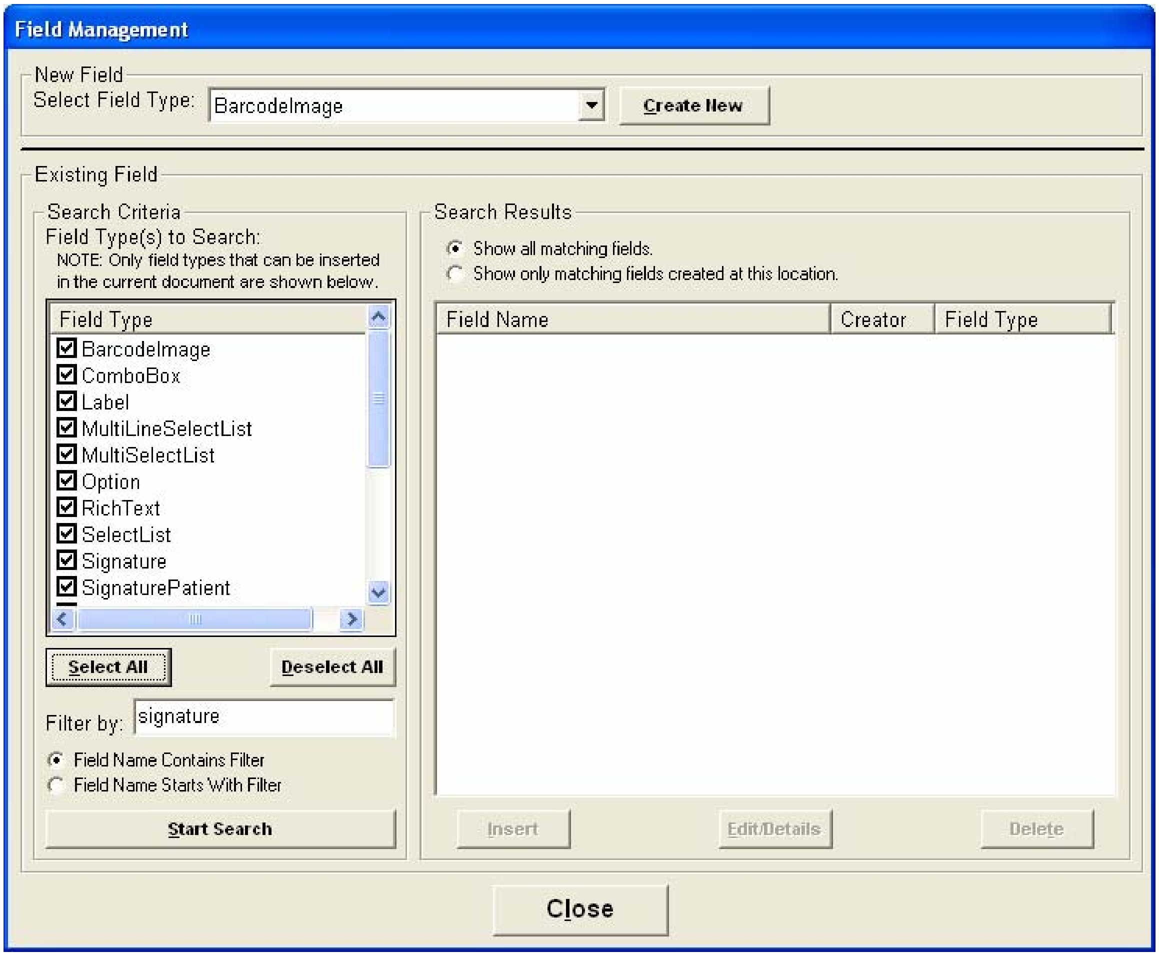
How Do I Add a Signature Field?

If you would like to add a prompt for signatures (patient, physician or witness) you may click the Insert Field button to choose an existing signature field in the database, or you may create your own signature field by clicking Create Field. The following example demonstrates selecting a signature field that has already been created. For instructions on creating your own signature field, please see the previous section titled "Editing a Non-Consent Document".

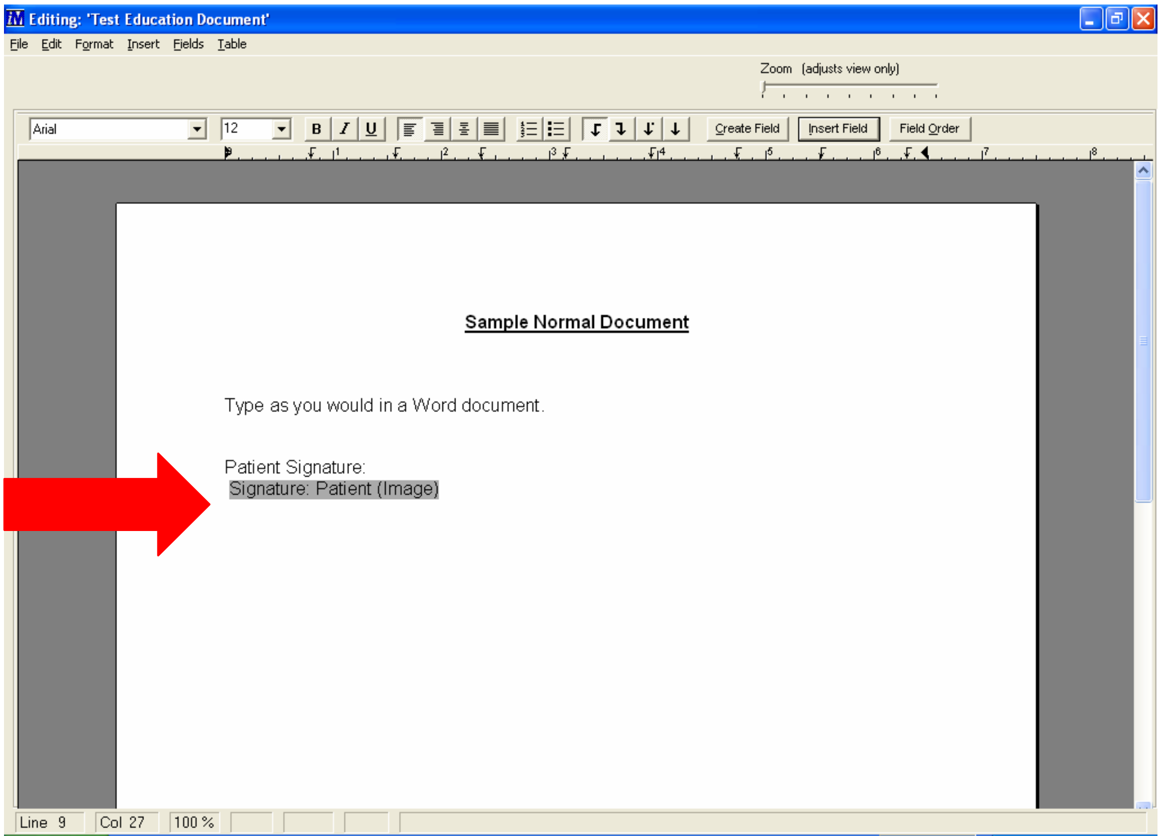
1. From your open Normal document, click the Insert Field button.



2. The Field Management screen opens. In the Filter by box, type 'Signature', then click Select All button. Click Start Search.



3. Select the appropriate signature from the Search Results box on the right, and click the Insert button. Your signature field will be inserted into your document, where your cursor was placed.



4. When you are finished, click File -> Save. This will save your changes.

How Do I Edit/Delete the Directions Field?

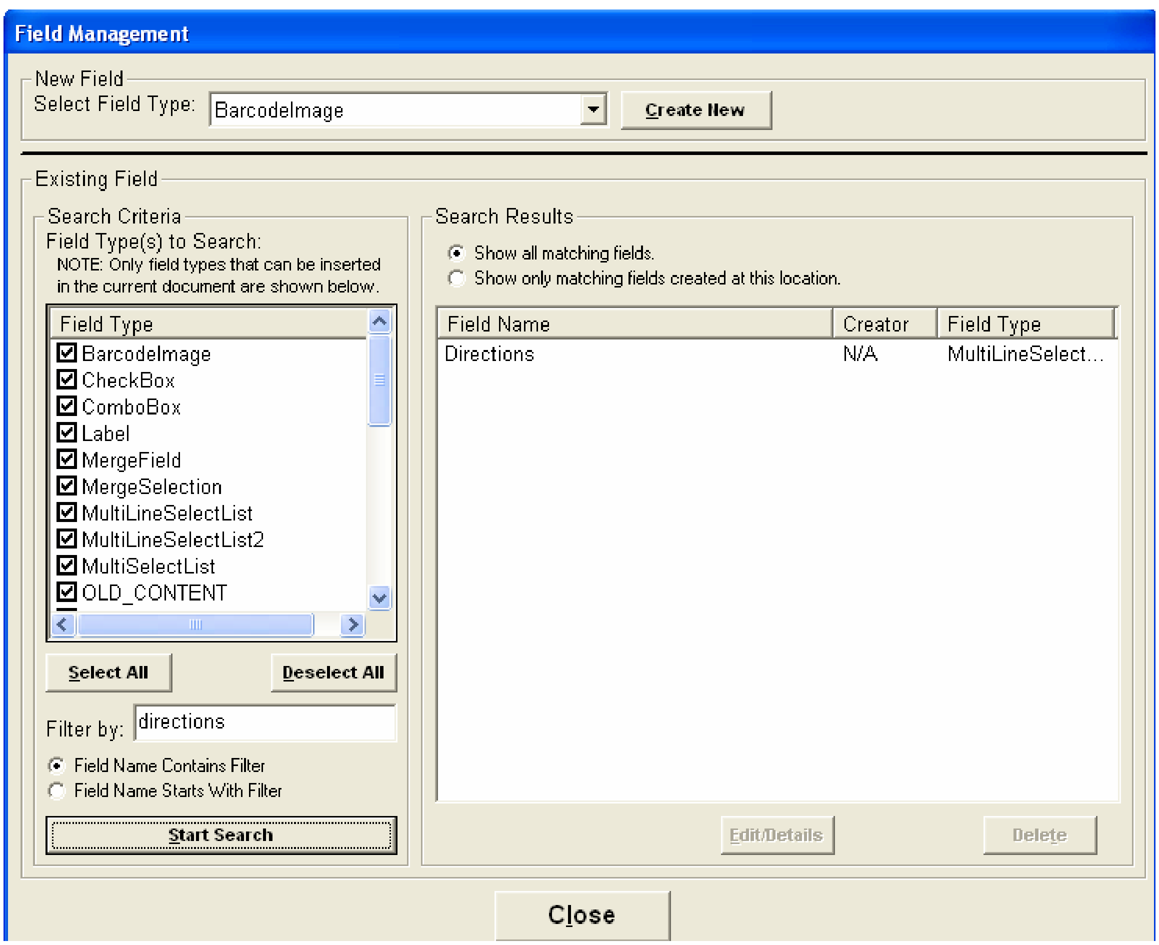
Many of the documents under the Tests and Admissions category have a field that prompts for directions to a particular area of your hospital (ex. same day surgery). If anyone is using these documents at your facility, the administrator will need to edit this Directions field.

To delete the prompt for Directions, just right click the document under Tests and Admissions, and click Edit. When the document opens, highlight the directions field with your mouse, and click Delete on your keyboard.

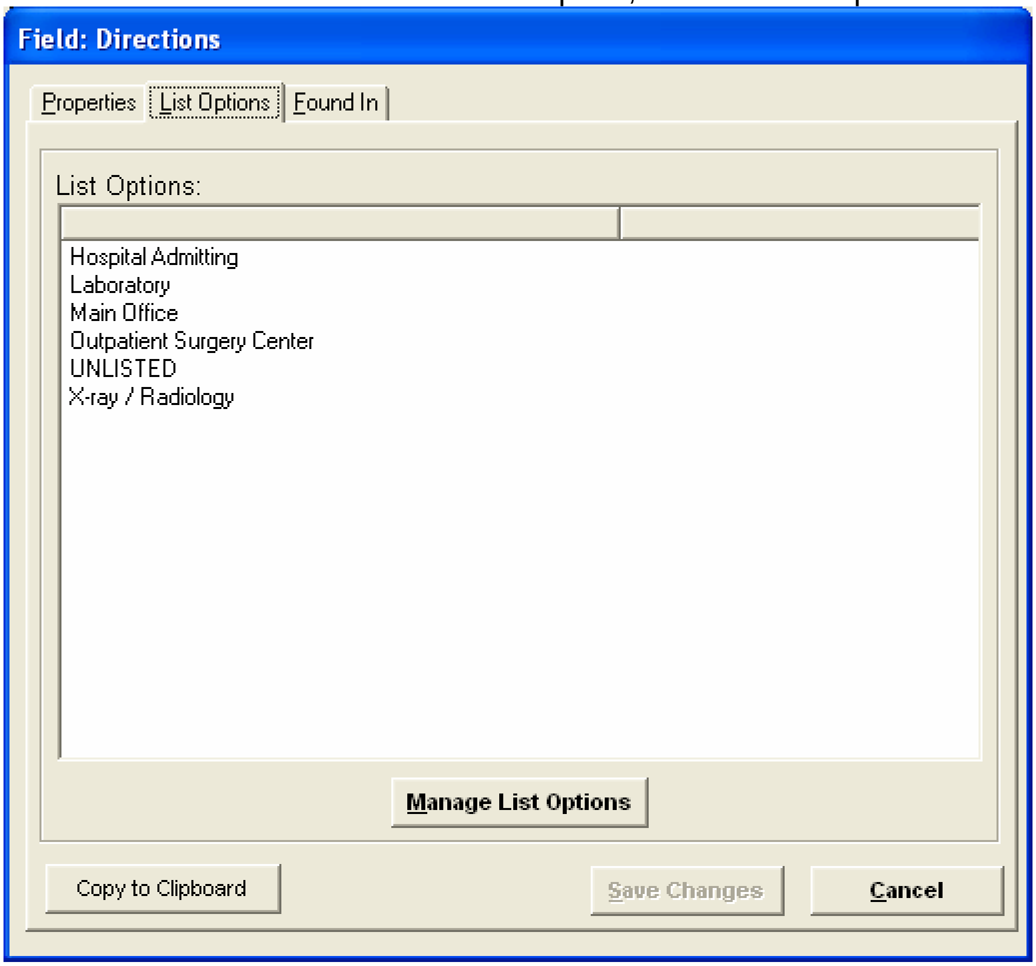
If you would like to customize directions for your facility, please follow these steps:

1. From the toolbar, Click Maintenance -> Fields

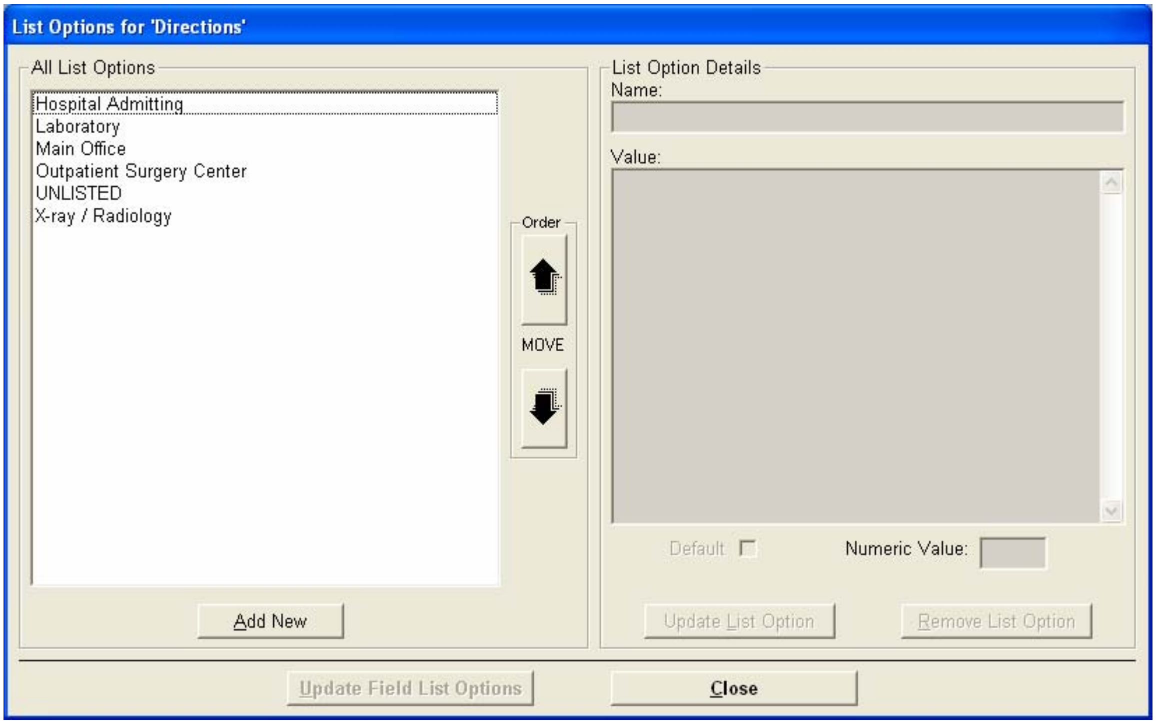
2. Type 'directions' in the Filter by box. Next, click Select All, and then click Start Search.



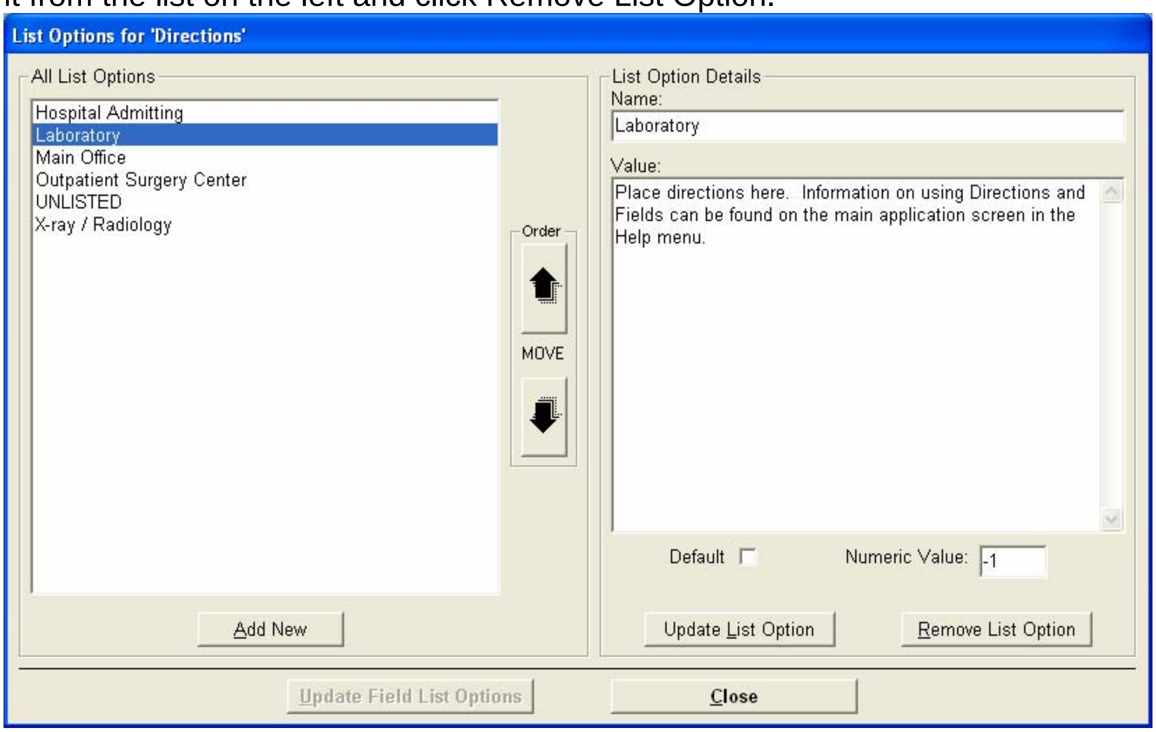
3. Select the Directions field from the Search Results window and click the Edit/Details button. When the screen opens, click the List Options tab.



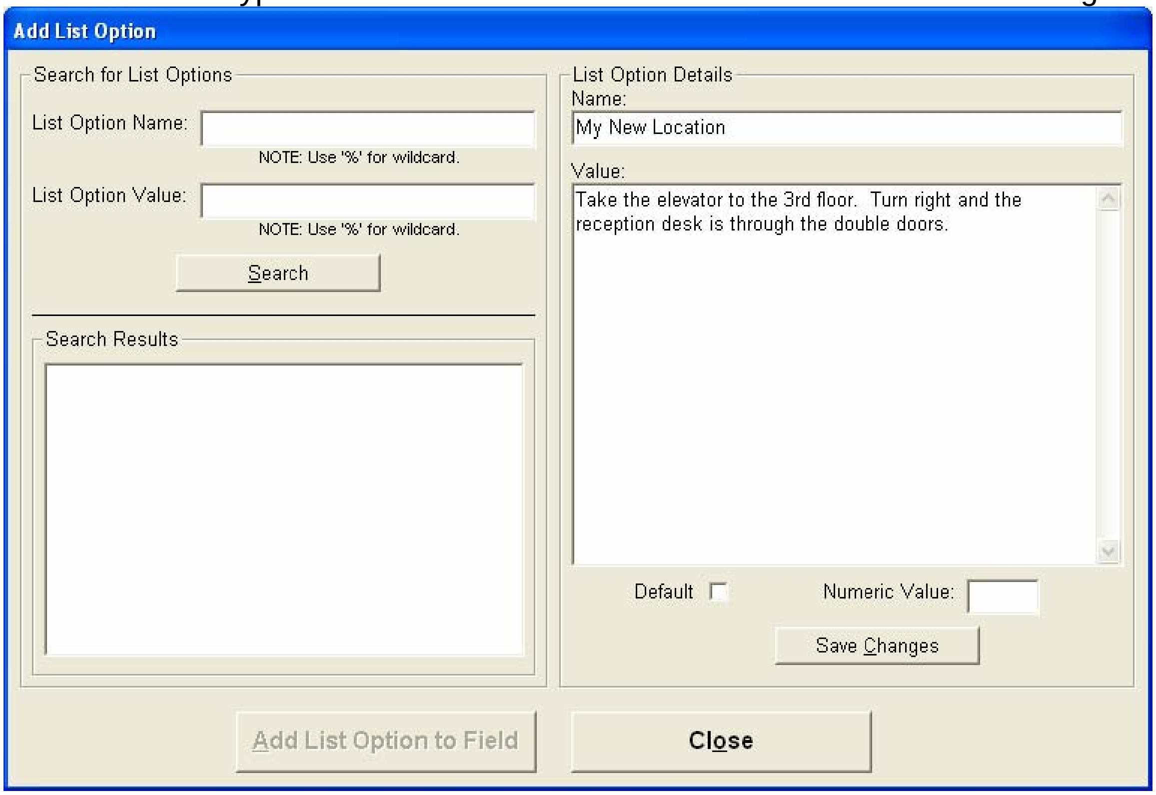
4. Click the Manage List Options button.



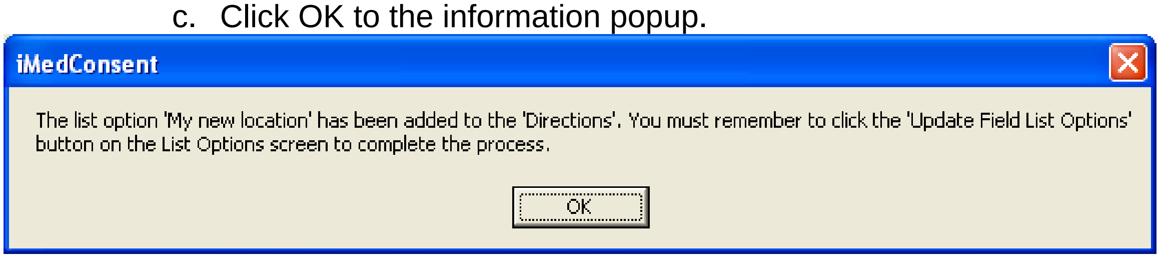
5. To edit the list options already present, just click on an option in the list and edit the contents on the right under the Value screen. When you have finished, click Update List Option to save your changes. To remove a list option, select it from the list on the left and click Remove List Option.



6. To add a new list option:
    a. Click Add New
    b. Type in the Name and Value text boxes and click Save Changes.



    c. Click OK to the information popup.



Can I Edit Existing Fields in iMedConsent?

You may not edit existing fields that come with the iMedConsent program because they are linked to National consents and non-consent documents. There are 3 exceptions to this rule. The following 3 existing fields may be edited:

1. Additional Information
2. NonEditableFacilityBoilerplateText
3. Directions

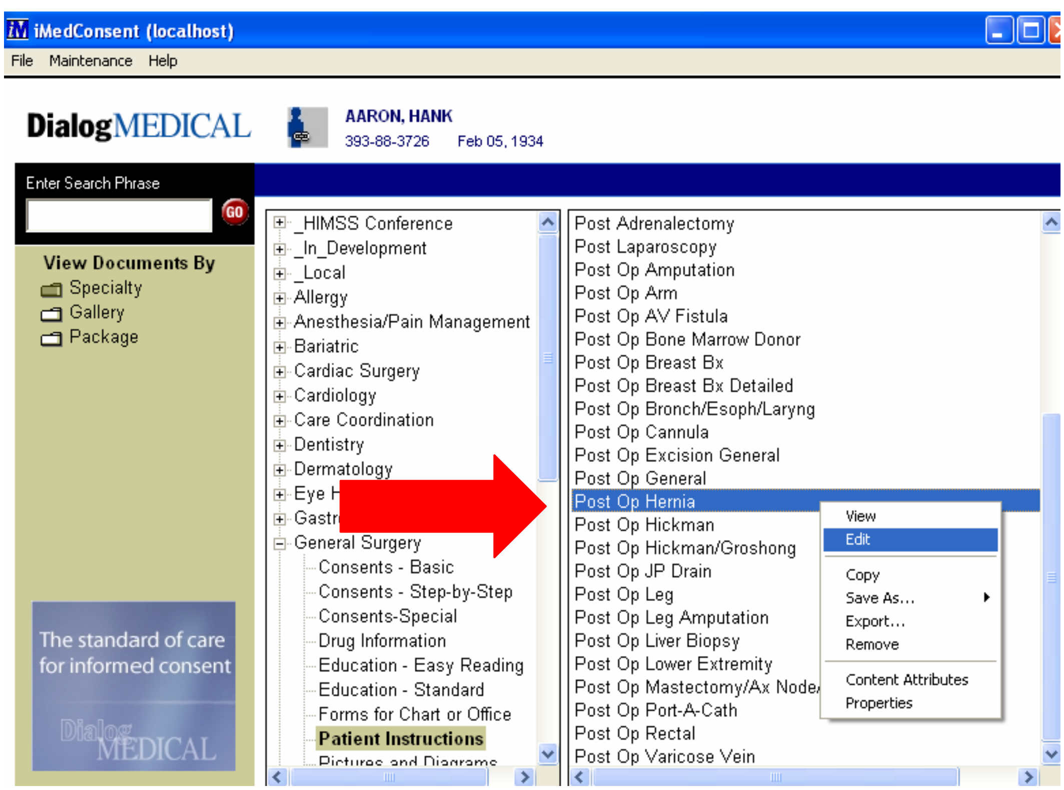
Please refer to the appropriate sections in this handbook for editing these fields.

How do I Copy an Existing Field?

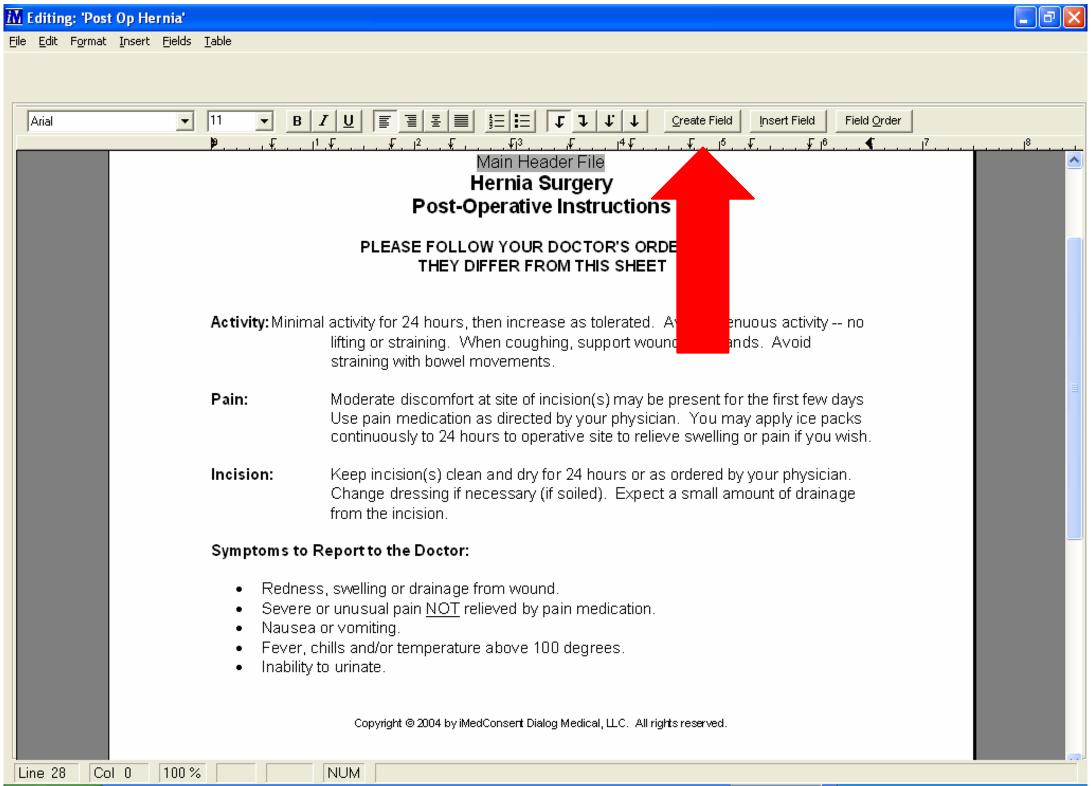
You may not edit existing fields that come with the iMedConsent program (with the exception of the three fields mentioned above), but you are allowed to copy an existing field and edit it as you wish for use in your own non-consent documents.

Here are the steps:

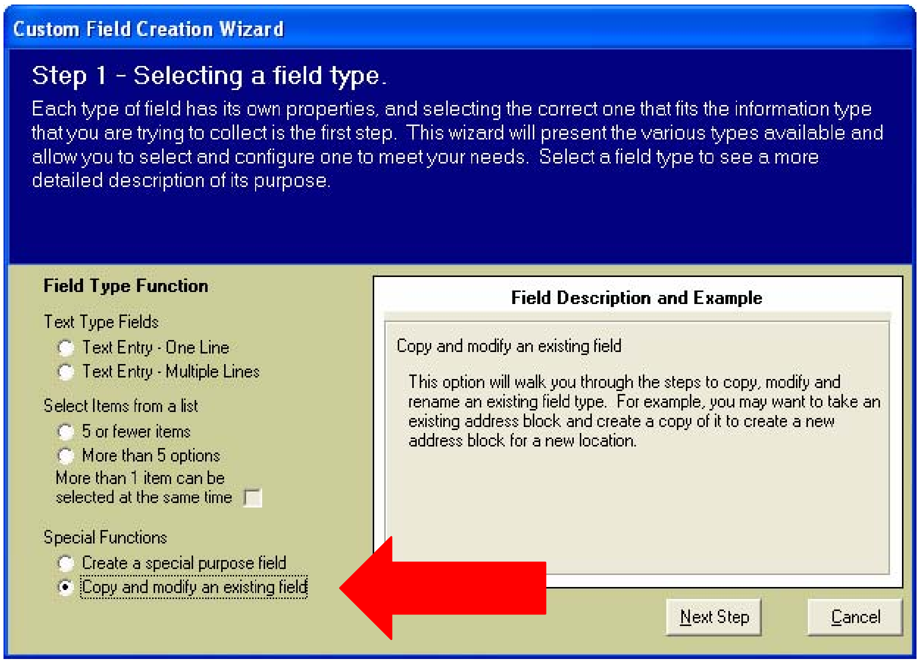
1. Right click on the document you wish to insert the field into.



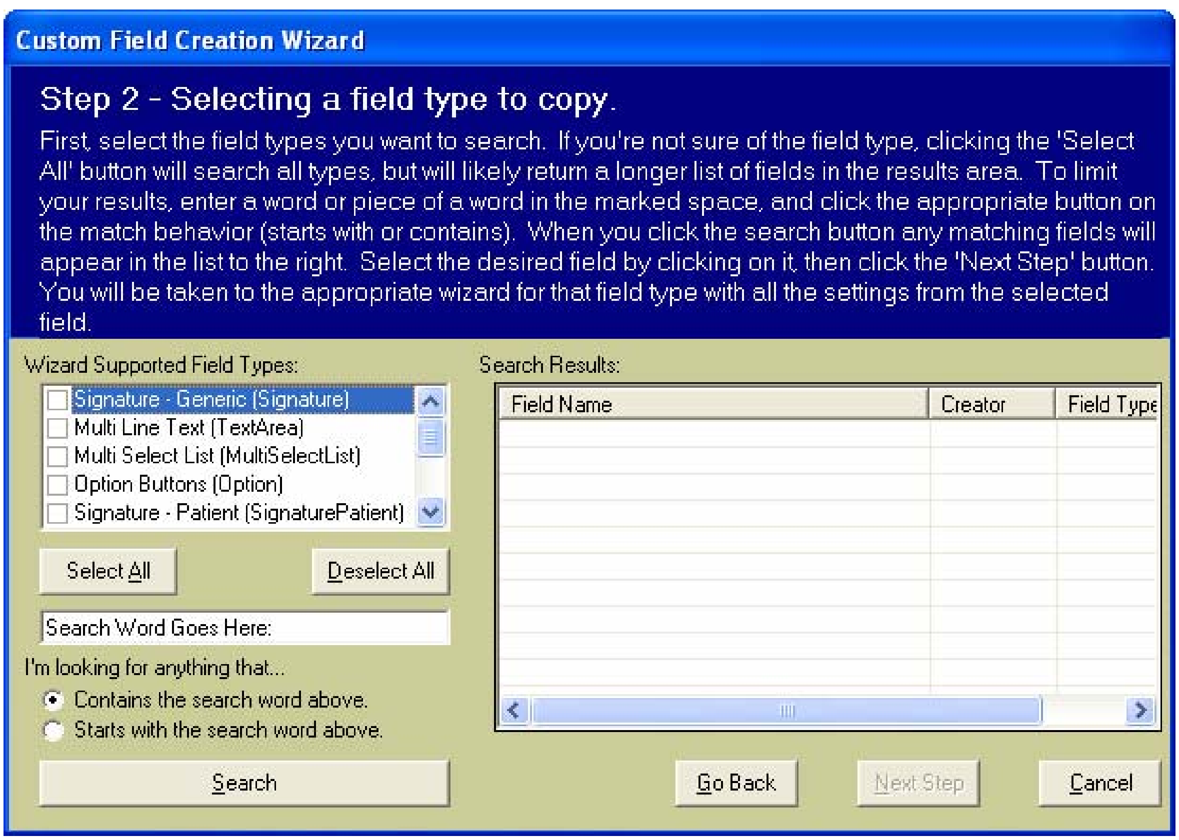
2. Click Edit and the document opens. Click the Create Field button.



3. The Field Creation Wizard Opens. Click the "Copy and Modify an Existing Field" radio button.



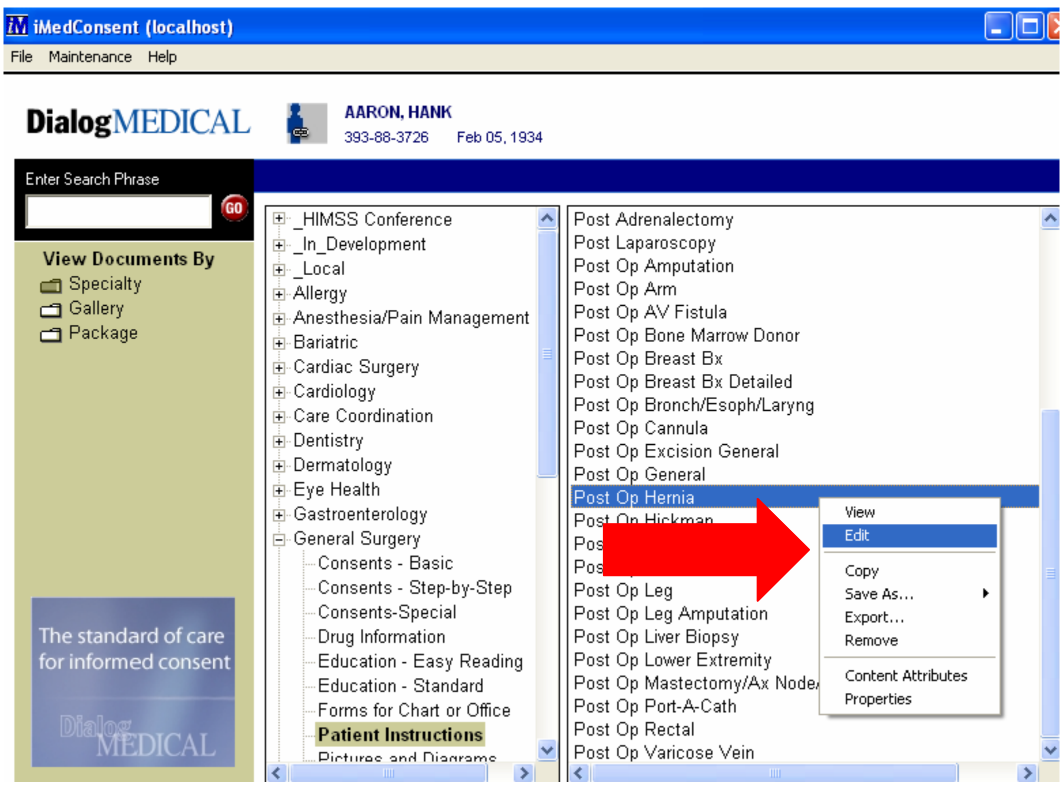
4. Click Next Step and follow the instructions on the wizard. Keep clicking Next Step until all the screens have been completed.



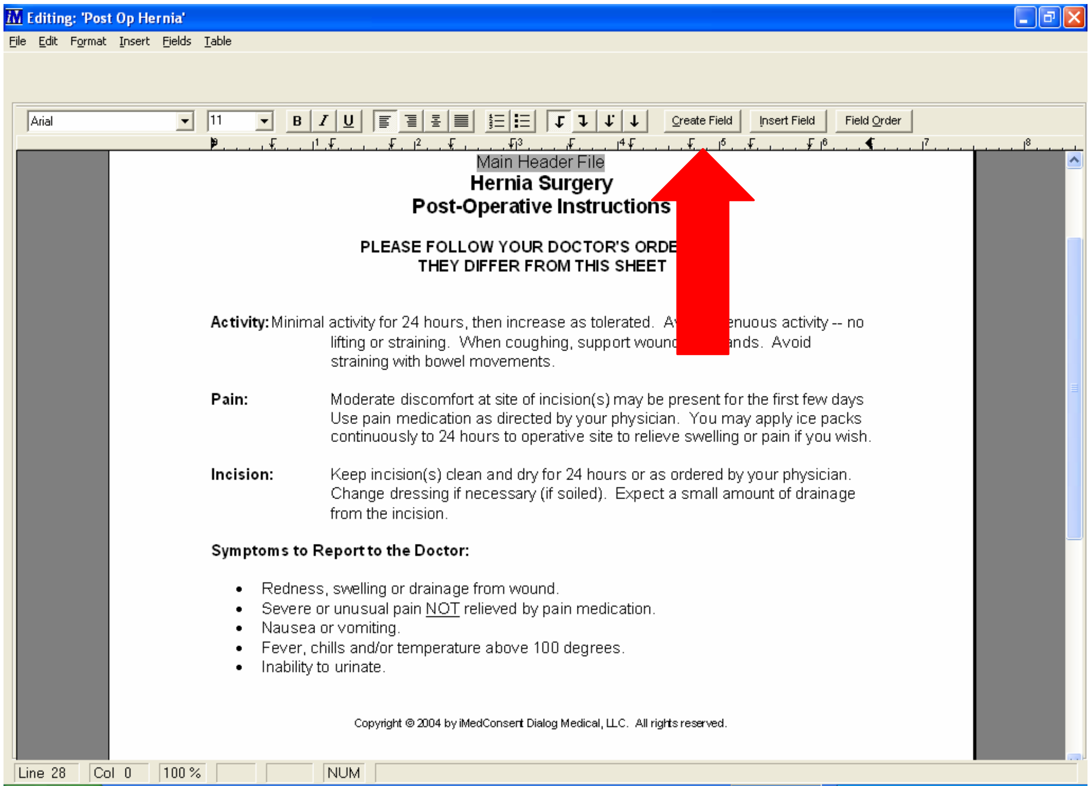
How Do I Create My Own Local Fields in iMedConsent?

You may create your own local fields for use in non-consent documents only. Examples of non-consent documents are your own local forms (Release of Information document), education documents, and patient instructions. Examples of local fields are custom signature fields, your own diagnosis pick lists for local consents, free text boxes, and multi-line select lists. To create your own local fields, follow these steps:

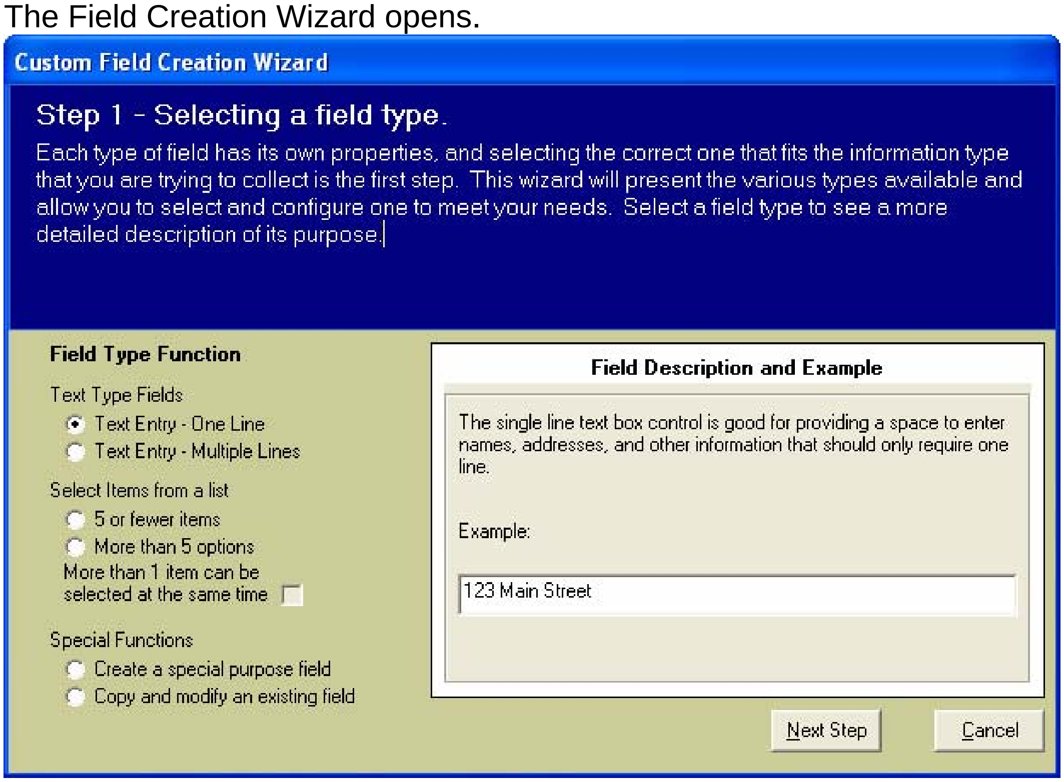
1. From the main iMed screen, right click on the document you are adding the field to, and click "Edit".



2. When the document opens, click the Create Field button.



3. The Field Creation Wizard opens.



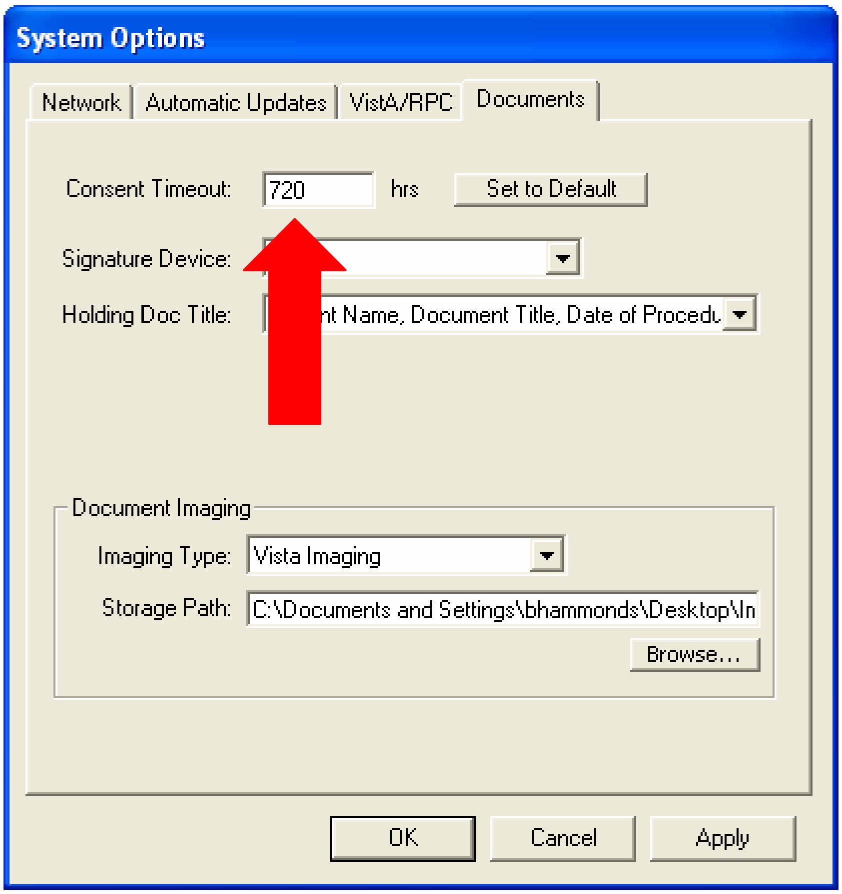
4. Select the radio button next to the type of field you would like to create. Then simply follow the steps in the wizard to create your new field.

How Do I Edit the Number of Days Held for Signature?

The default number of days consents can be "held for signature" is 30. Many sites have increased this number to 60, 90, or even 120 due to surgery schedules. Keep in mind, this change affects the entire program, not just one specialty.

1. From the toolbar, go to Maintenance → Preferences → System Options

2. Click on the Documents tab



3. Change the Consent Timeout box (in hours). Click Apply to Save.

What Are Document Activity Profiles?

Document Activity Profiles (DAP) provide an extensible and granular way to define behavior of documents throughout the consent process.

A Document Activity Profile may be assigned to individual documents, categories, specialties, or modes.   When retrieving a DAP for a document, the program will first look to see if a DAP is assigned at the document level; if not found, it will look at the category level; if not found, it will look at the specialty level; if not found, it will look for the default for the current mode. The current mode default will always exist because we install the product with DAP mode defaults.

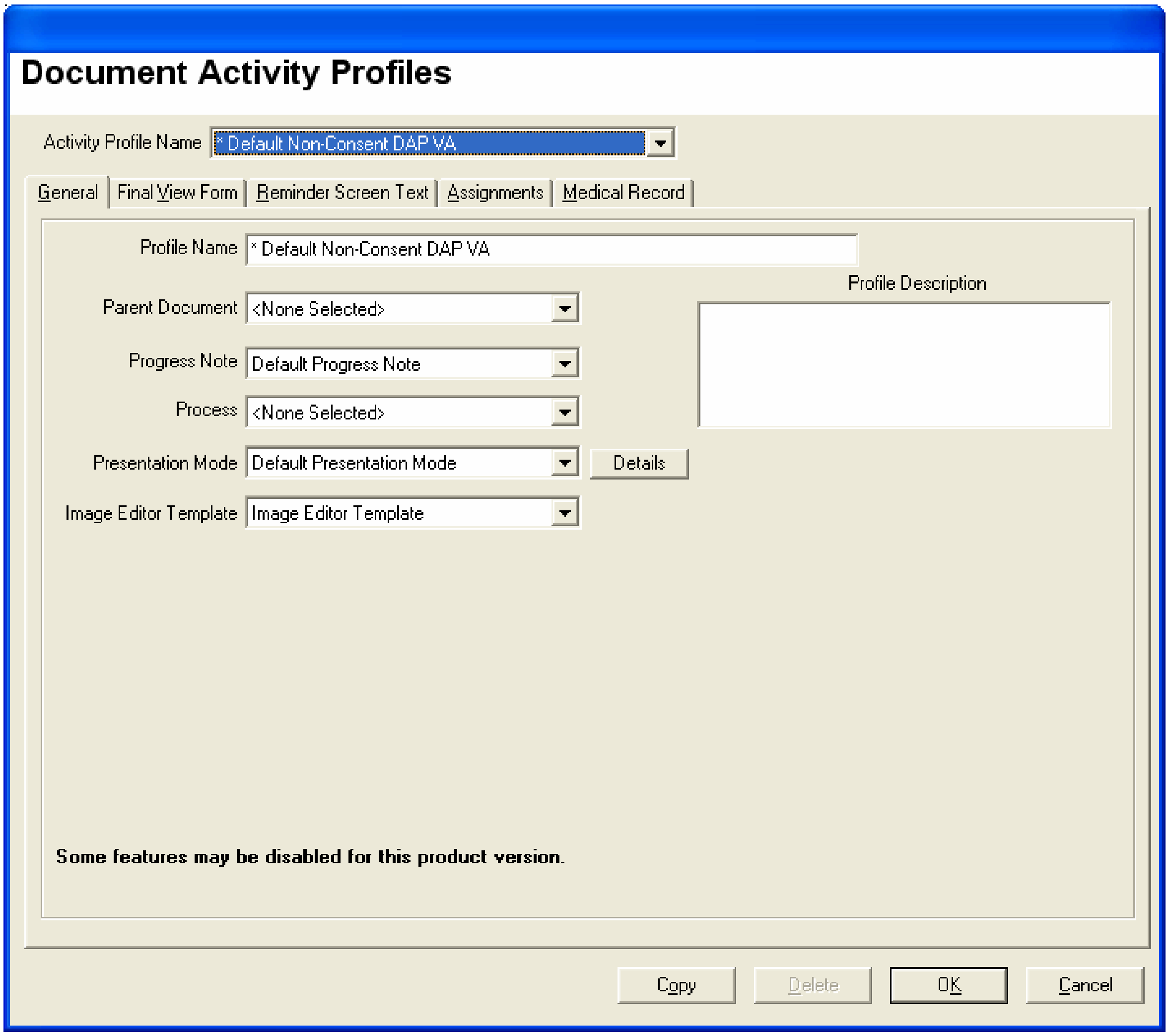
Some things that Document Activity Profiles control include (but are not limited to):

- Which Progress Note will be applied (Non-consent documents only)
- If Auto Save & Auto Cancel are enabled (Non-consent documents only)
- Assignment of TIU and Sign Note IDs

Overview of DAP Screens

To open the DAP screen; click Maintenance →Preferences → Document Activity Profile. The following screen opens:

General Tab:



In this screen, the "General" tab displays all of the core behaviors for a Document Activity Profile (DAP).

NOTE: PLEASE DO NOT CHANGE ANY OF THESE SETTINGS FOR CONSENT DAPS.

At the very top, click the drop down arrow to indicate the Profile Name or <new> if you are creating a new DAP.

View the **Parent Document** template, the **Progress Note** template, the **Process** for the DAP to follow, the **Presentation Mode** and **Image Editor Template**. All of these are optional depending on what type of document(s) you are going to associate your DAP to.

You may indicate any descriptive text about the DAP in the **Profile Description** field. The profile description will only display in this DAP maintenance screen.

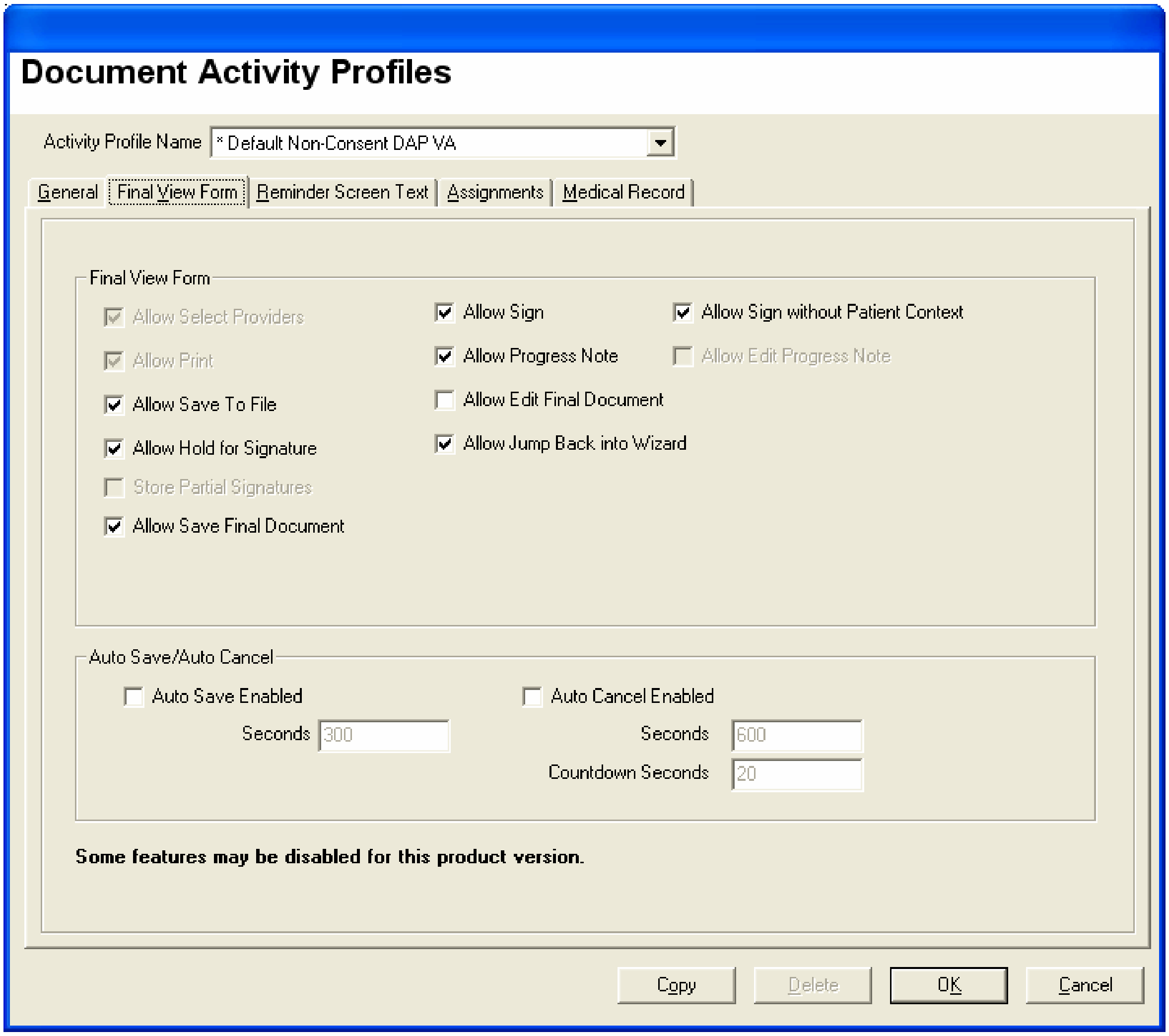
Notice the **"Copy"** button. DAPs can be copied and renamed then associated to other documents very easily using this interface.

The **"Delete"** button is available only on Document Activity Profiles that are eligible to be deleted. You cannot delete a DAP that is associated to documents. You also cannot delete the mode Default DAP.

Use the **"OK"** button to commit your changes. It appears in all of the screens so you are always able to save your work.

The **"Cancel"** button can be used if you don't want to commit any changes you have indicated in these screens.

Final View Form Tab:



PLEASE DO NOT CHANGE ANY SETTINGS ON THIS SCREEN FOR CONSENT DAP's.

- **Allow Select Providers** will enable/disable the provider selection screen for this DAP

- **Allow Sign** will enable/disable the signature capture screens thus affecting the save processing. If you disable signatures in a DAP associated to Consent documents, you are disallowing the SAVE process as well. Be careful with this setting.

- **Allow Sign without Patient Context** will set the program to accept signatures for consent if there is no patient associated to the consent. This is primarily for use in the Direct-to-Physician product line. This setting is dependent on the "Allow Sign" setting and will not be enabled if the Allow Sign setting is disabled.

- **Allow Print** will enable/disable the ability to print documents associated to this DAP.

- **Allow Progress Note** will enable/disable the program's ability to generate a progress note for the document. Progress notes can now be generated for all types of documents due to the development of Document Activity Profiles. Set the template for the progress note on the "General" tab.

- **Allow Edit Progress Note** will enable/disable the user's ability to make edits in the progress note that will be sent to CPRS system.

- **Allow Save to File** dictates the ability to export documents associated to this DAP to programs/protocols outside of iMedConsent. (ie: MSWord, ASCII, .rtf, etc.)

- **Allow Edit Final Document** will enable/disable the user's ability to type edits into the displayed document in the final view form.

- **Allow Hold for Signature** enables/disables the "Documents to Sign" feature for all documents associated to this DAP.

- **Allow Jump-Back into Wizard** grants the user permission to get back into all wizard screens. When turned off, the wizard is disabled after the view screen is displayed.

- **Allow Save Final Document** will enable/disable the ability for iMedConsent to send the document and progress note to CPRS or other EMR.

The Auto-Save/Auto-Cancel section of this tab allows the user to indicate the behavior and timing of the auto-save and auto cancel functions. The fields are as follows:

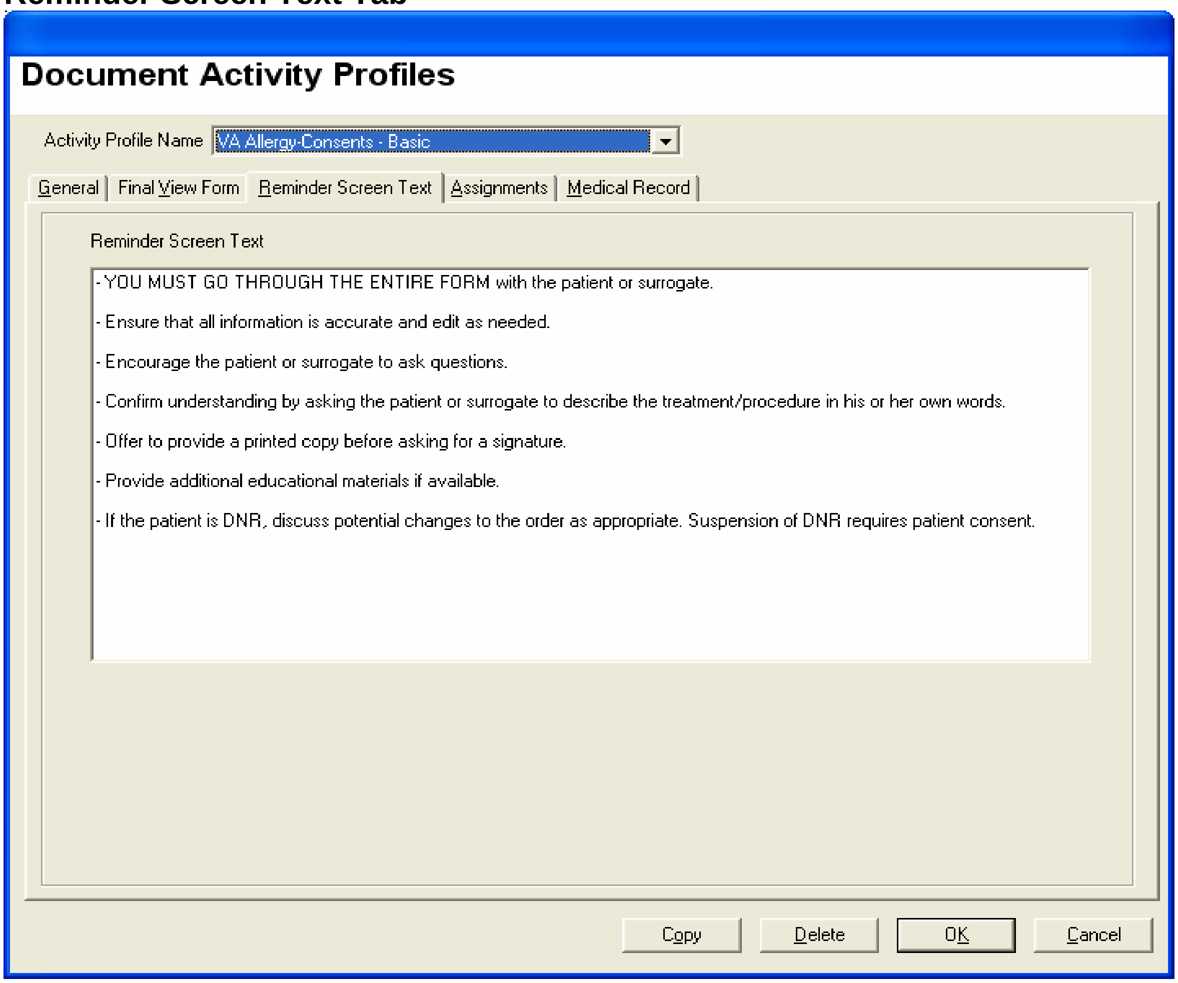
- **Auto-Save Enabled** when checked, this setting indicates that if a document is eligible to be saved (all required data is present) then after a period of time (indicated in the following field) the document save process will be invoked and send the document and/or progress note to CPRS or other EMR.

- The **Seconds** field will either be activated or inactivated dependent on the state of the Auto-Save Enabled selection. Indicate here the number of seconds iMedConsent should wait before auto-saving documents associated to this DAP.

- **Auto-Cancel Enabled** - when checked, this setting indicates that if a document is NOT eligible to be saved (all required data is present) then after a period of time (indicated in the following field) the document will be discarded and return the user to the iMedConsent Main UI.
- The **Seconds** field will either be activated or inactivated dependent on the state of the Auto-Cancel Enabled selection. Indicate here the number of seconds iMedConsent should wait before auto-canceling documents associated to this DAP.

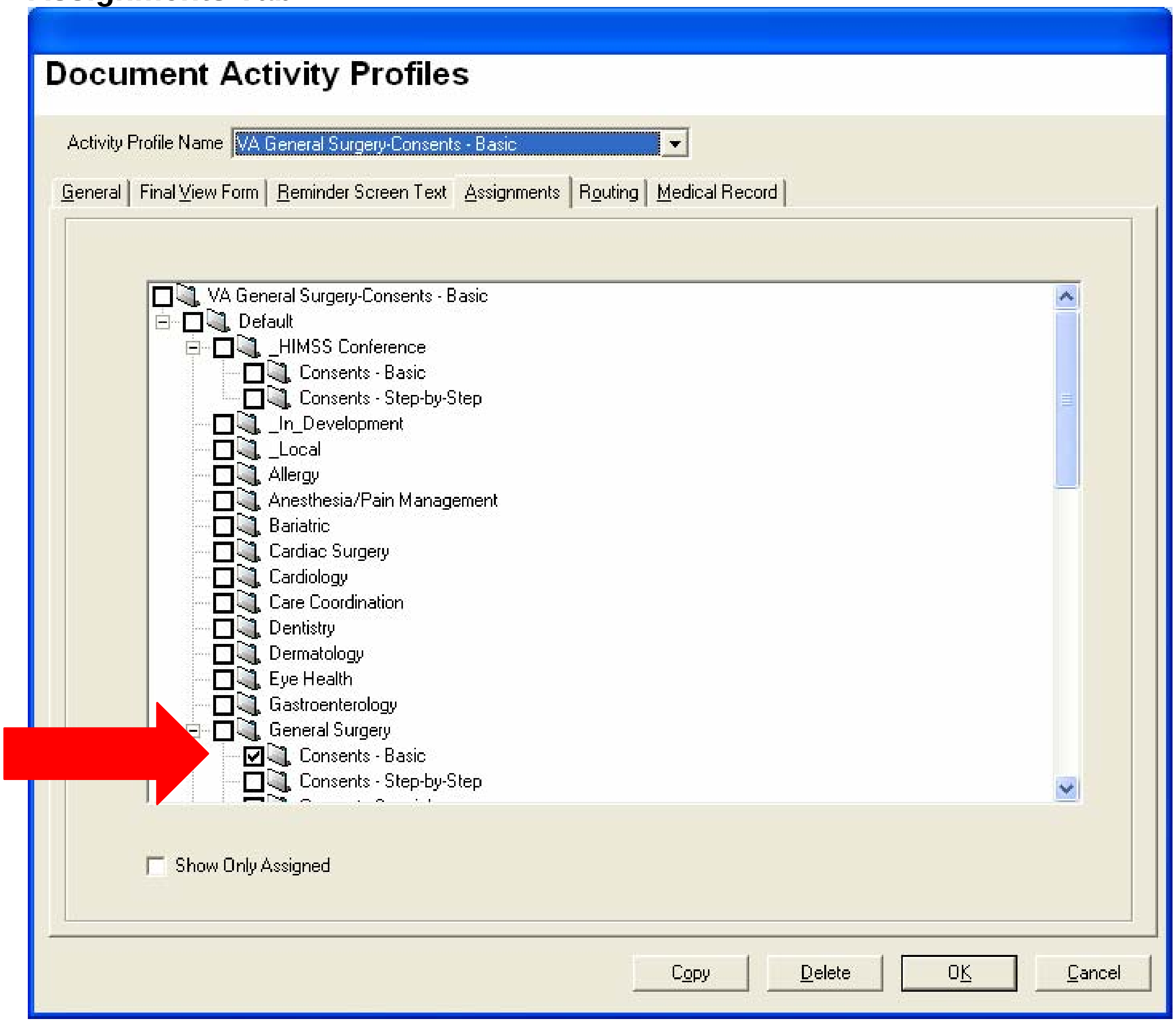
- **Countdown Seconds** indicates the number of seconds the auto-cancel warning will appear on-screen before the document is discarded.

Reminder Screen Text Tab



This screen displays the text that appears on the reminder screen.
PLEASE DO NOT CHANGE ANY OF THE REMINDERS ON THIS SCREEN

Assignments Tab

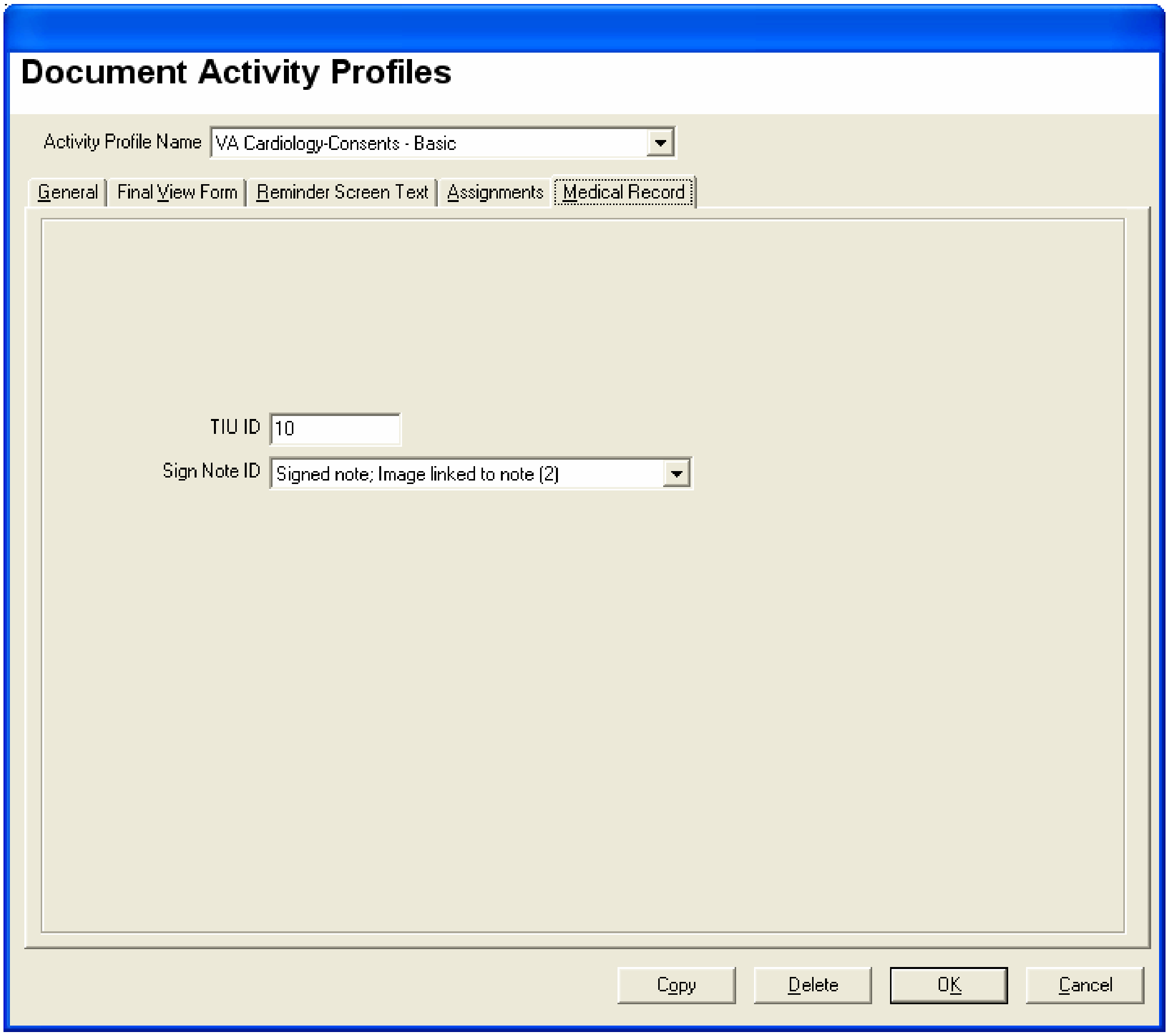


The assignments screen allows the user to associate the current Document Activity Profile to Specialties, Categories and Documents.

For the selected DAP, use the tree structure to indicate what documents or Categories or even Specialties you want to apply the DAP to. Do this by indicating with a check in the adjacent checkbox.

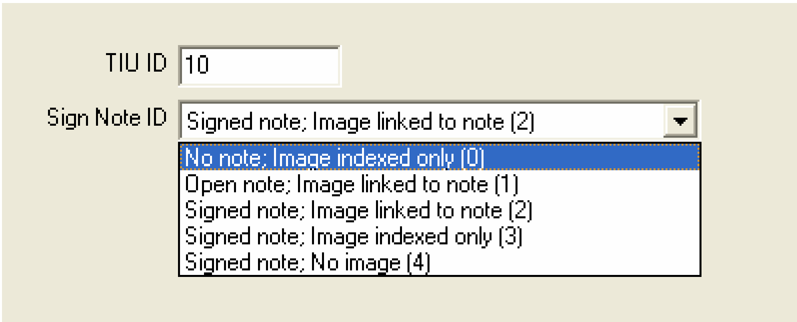
Tip: To expand a specialty or category, simply click on the gray folder next to the specialty or category

Medical Record Tab



The **TIU ID** indicates what progress note title will display for this DAP. The number assigned represents the Internal Entry Number (IEN) from CPRS.

The **Sign Note ID** should always be 2 for consent DAPs. This allows the progress note to be saved to CPRS with administrative closure, and the consent image to be saved to VistA Imaging. Non-consent DAP's have other options. Cick the dropdown arrow to view the other options available:



0 – no note, image linked to MAG Category
1 – note, leave note open, image linked to TIU Note
2 – note, sign note, image linked to TIU Note
3 – note, sign note, image linked to MAG Category
4 – note, sign note, no image 7

TIP: Use Option 4 for non-consent documents you do <u>not</u> want saved to VistA Imaging.

How Do I Create Specialty Specific Note Titles?

You have the option of creating TIU note titles specific to each specialty. For example, instead of having one generic note title called "Informed Consent", you may create multiple note titles for iMedConsent. Ex. Informed Consent – Urology, Informed Consent – Cardiology, etc. Here are the steps:

1. Create the new TIU title(s) in VistA. Write down the number(s).

2. Open iMedConsent. Click the Maintenance menu, then Preferences and select Document Activity Profiles.

3. In the first box at the top of the screen, select the appropriate DAP.

4. Click the Medical Record tab.

5. TIU ID box, type in the appropriate IEN number. Your sign note ID will always default to "2" for Consents and Non-Consent documents. The number 2 ensures that a progress note is created, is administratively closed, and is saved to VistA Imaging. If you want a progress note created, signed and closed, but NOT saved to VistA Imaging, put in a "4" for Sign Note ID. This feature would most likely be used for non-consent documents that you do not want saved to Imaging.

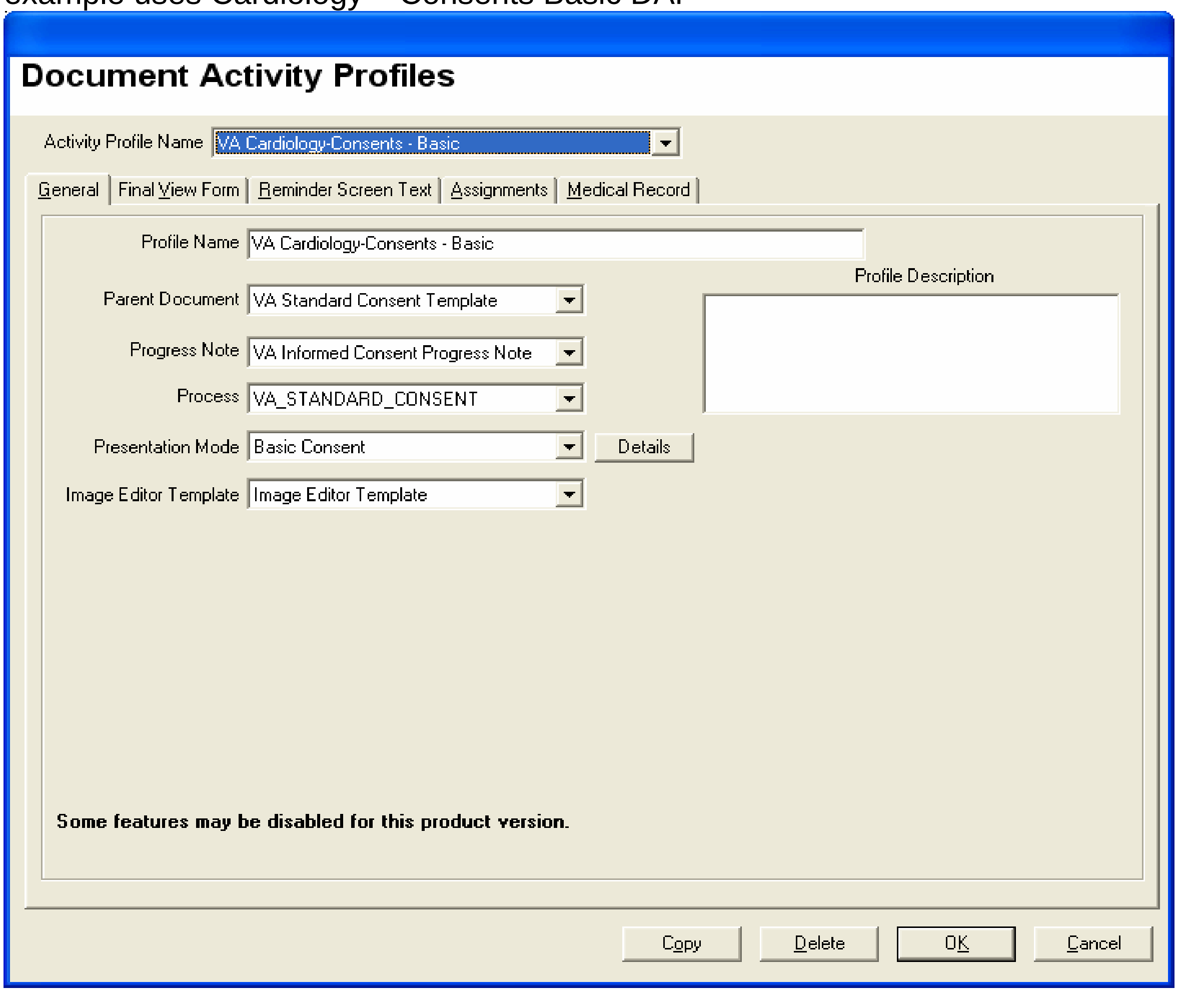
6. Click OK to save your changes.

How Do I Copy a Document Activity Profile?

Anytime you create a new specialty in iMed that contains consent categories, you must assign a document activity profile to it. You will have to create separate profiles for Basic and Step by Step consents. The easiest way to do this is to copy an existing DAP and rename it. Here are the steps:

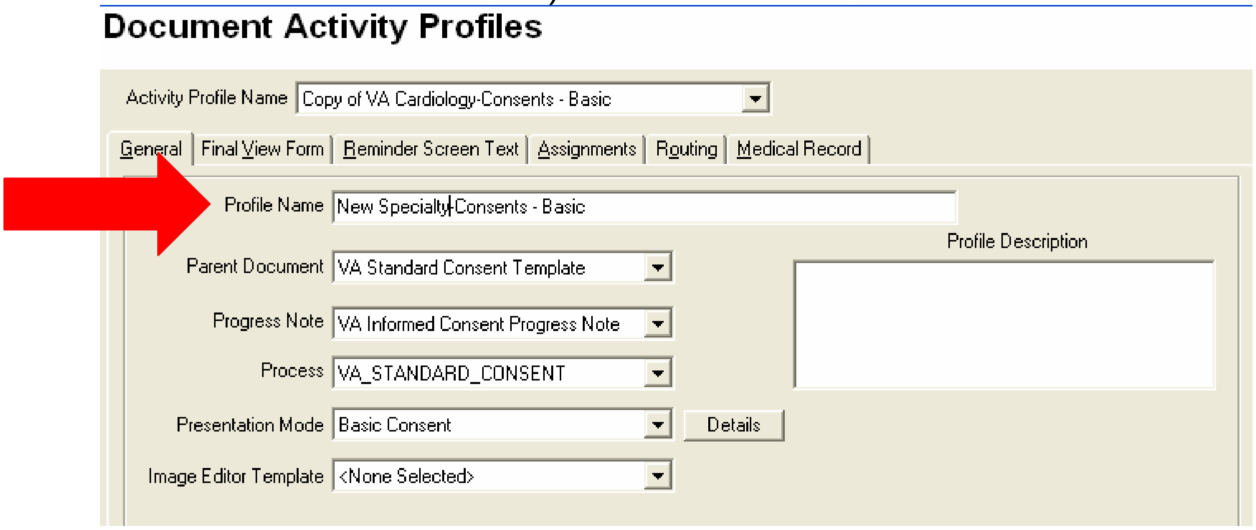
1. Open iMed and select Maintenance → Preferences → Document Activity Profiles

2. Select an existing DAP from the dropdown box at the top of the screen. The example uses Cardiology – Consents Basic DAP

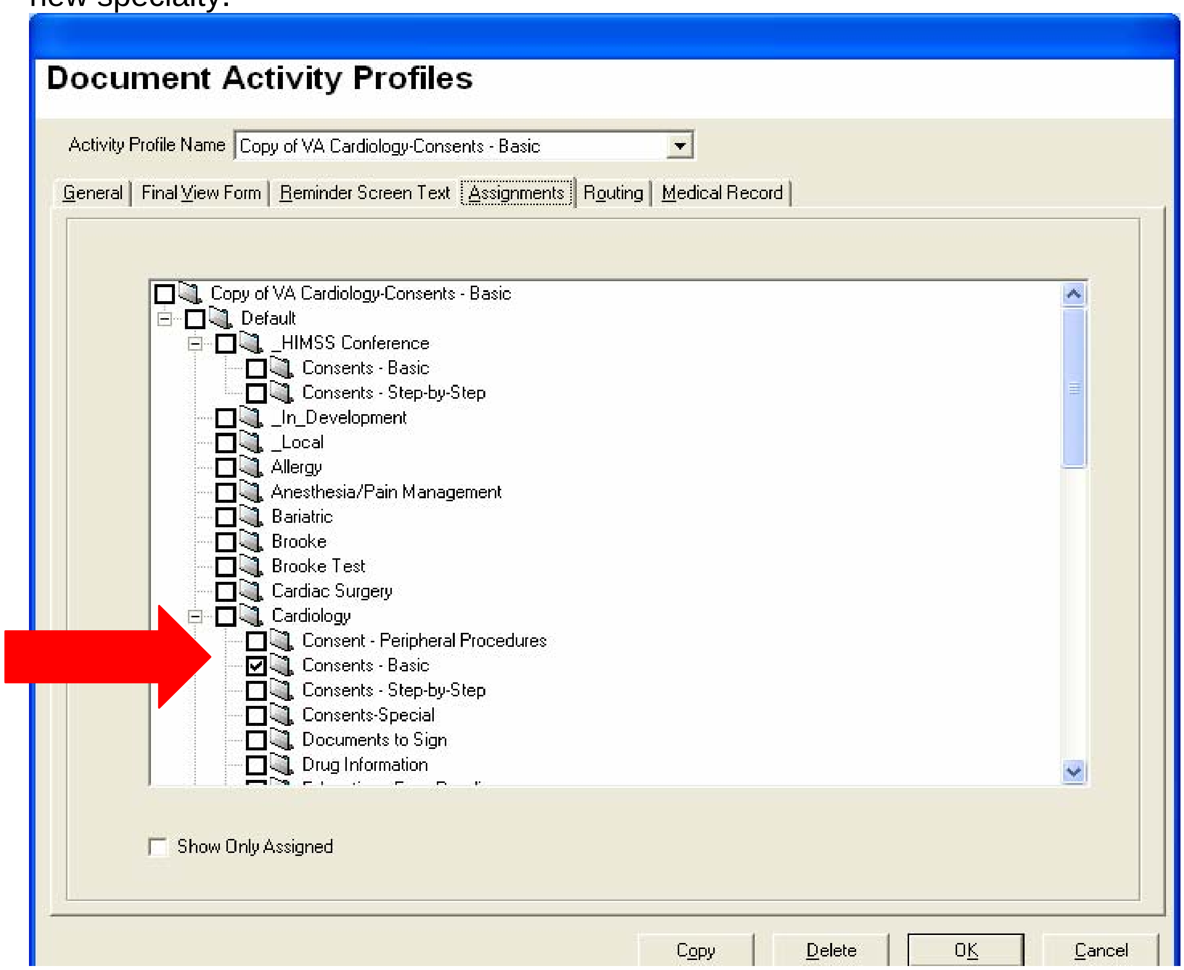


3. Click the Copy button at the bottom of the screen.

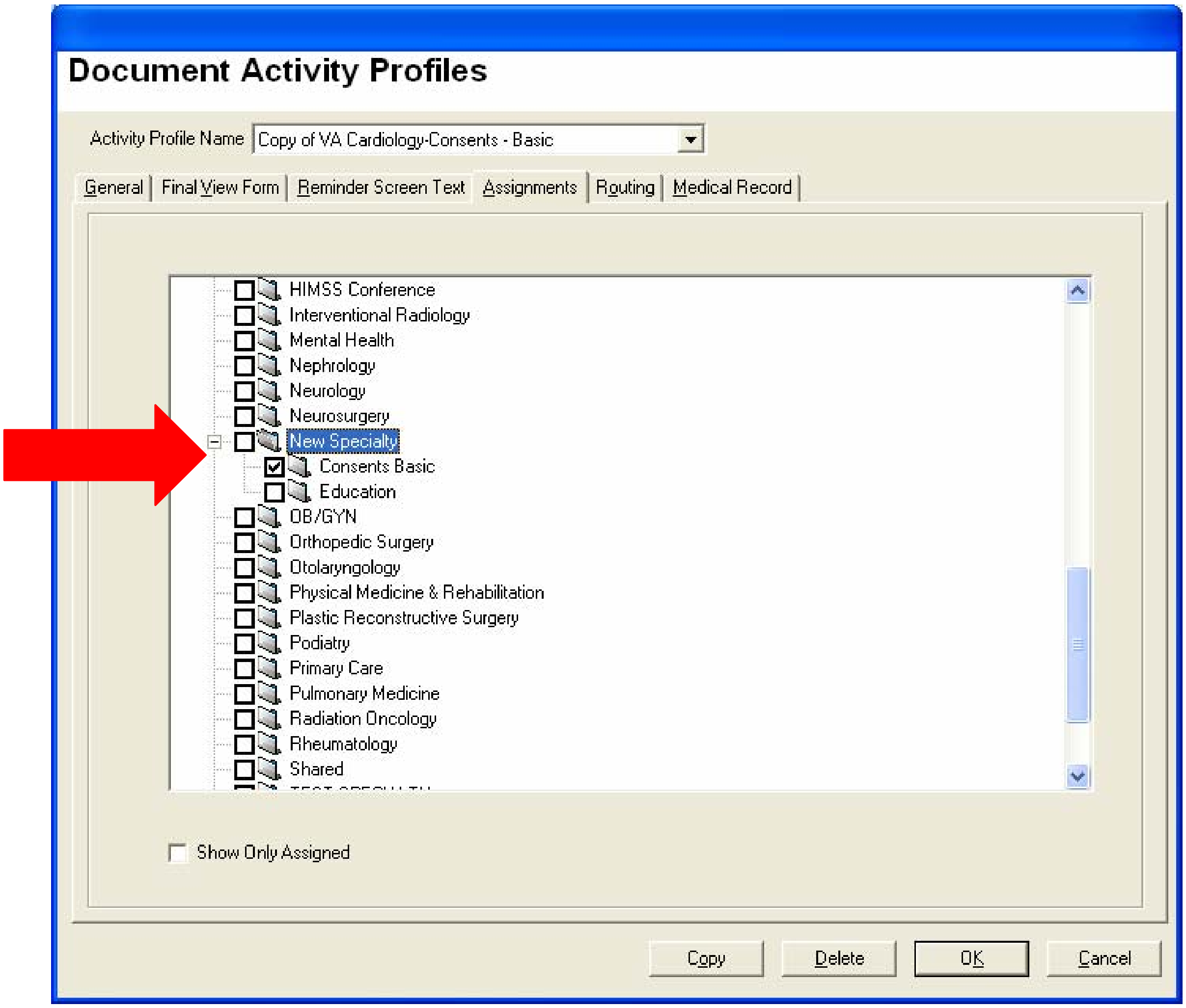
4. In the Profile Name box, type in the name of your new Specialty (make sure to leave the text Consents – Basic)



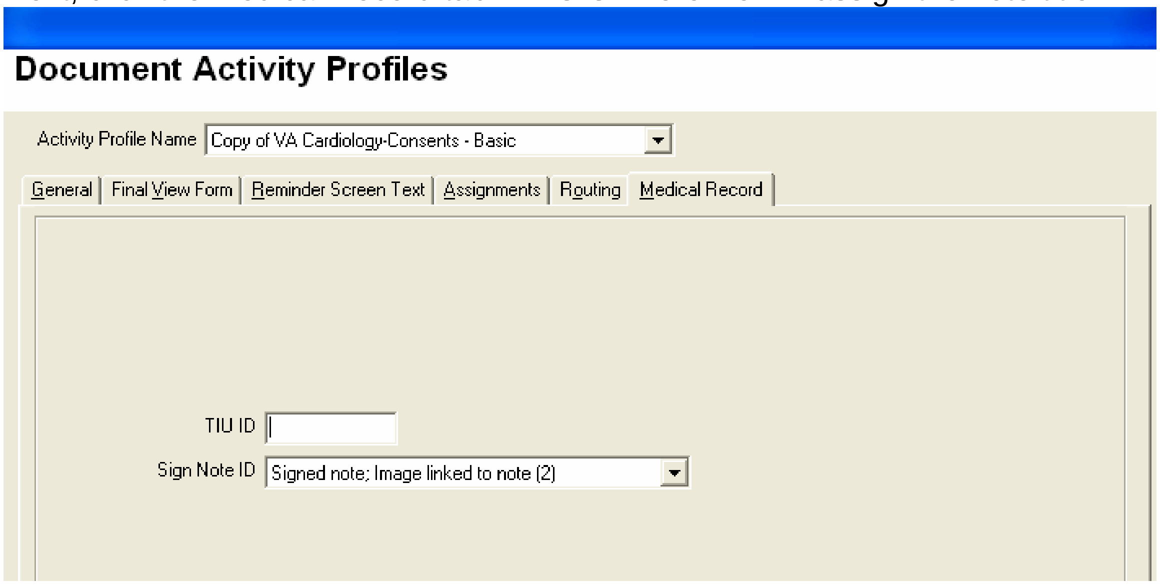
5. Click the Assignments tab. We must de-select the assignments from the DAP we copied (in this case, Cardiology) and select the new assignments for our new specialty.



6. Scroll down and click the gray folder next to your new specialty to view all the categories. Click the box next to the categories you want this DAP assigned to.



7. Next, click the Medical Record tab. This is where we will assign the note title.



8. Enter the IEN number into the TIU ID box.

9. Click OK to Save Changes.

10. Repeat steps for Step by Step Consent DAP (if applicable).

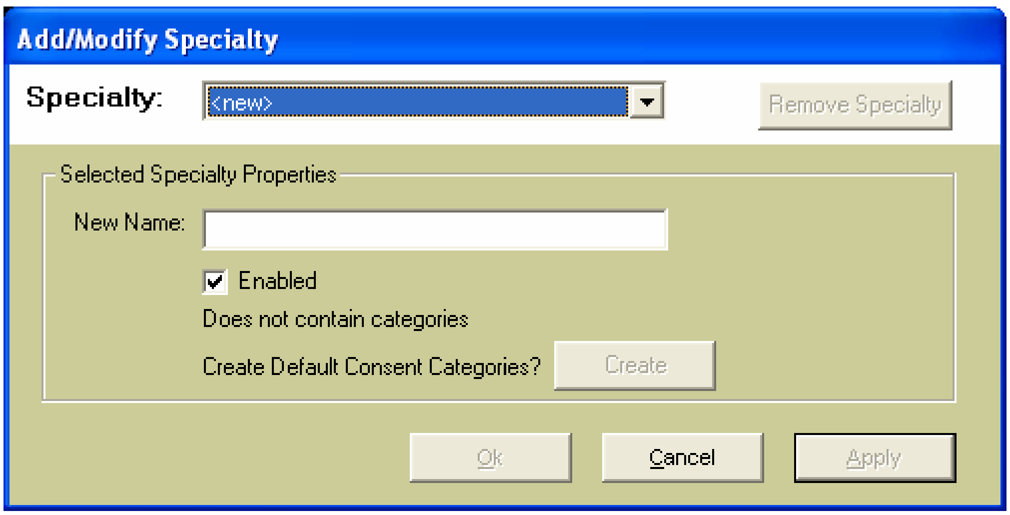
NOTE: Non-consent categories under any specialty will automatically default to the note title assigned to education/non-consents. This is called the Default Non-Consent DAP. It is usually the first DAP that appears in the list. If you want a different note title than the default, you must copy the Default Non-Consent DAP and rename it. Don't forget to un-check the Default box on the Assignments tab of the copy.

How Do I Create a New Specialty?

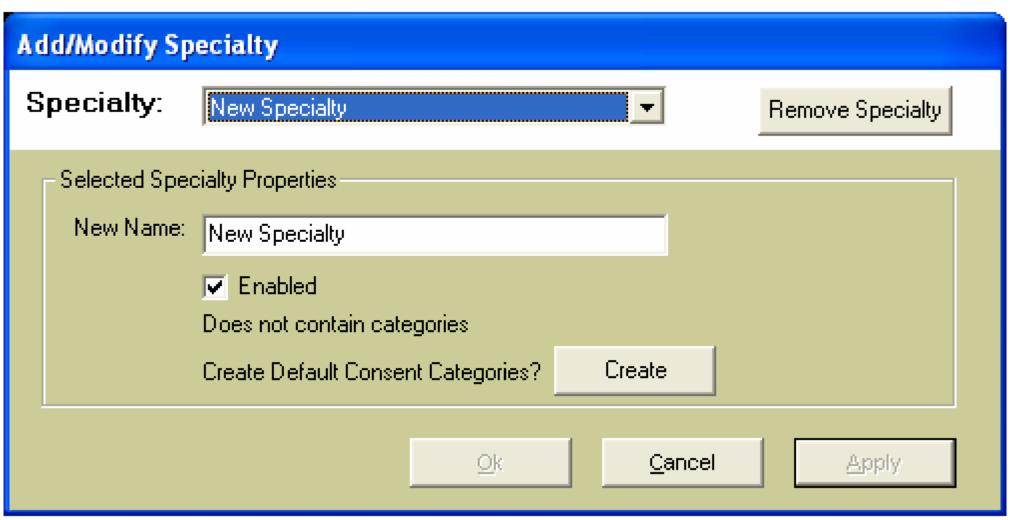
You may create your own specialty in iMedConsent to include local forms and/or consents. (Primary Care for example) To create a specialty:

1. From the toolbar, click Maintenance -> Specialty

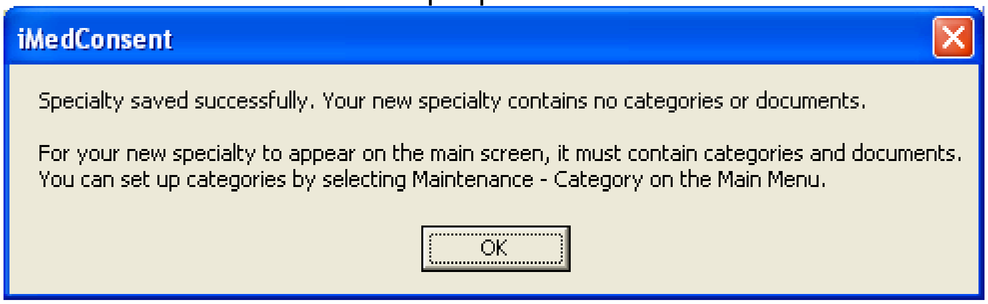
2. When the screen opens, click the drop down arrow next to Specialty and select New.



3. Give your Specialty a name and click Apply.



4. Click Ok to the information Pop-Up



5. Click the Create button if you want your new specialty to contain default consent categories (basic and step by step).

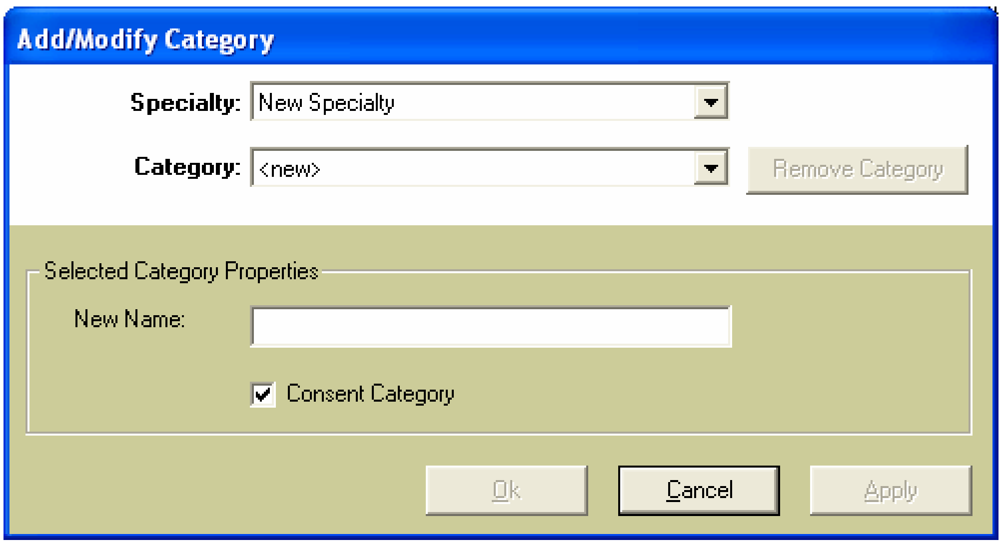
NOTE: Anytime you create a new specialty that contains consent categories, you **must** attach a Document Activity Profile to it so that iMed knows what note title to attach. For instructions, please see the earlier section titled “Copying a Document Activity Profile”.

How Do I Create a New Category?

Once you create a new Specialty, you must then create a new category if you want to store non-consent documents here. To create a category:

1. From the toolbar, click Maintenance -> Category

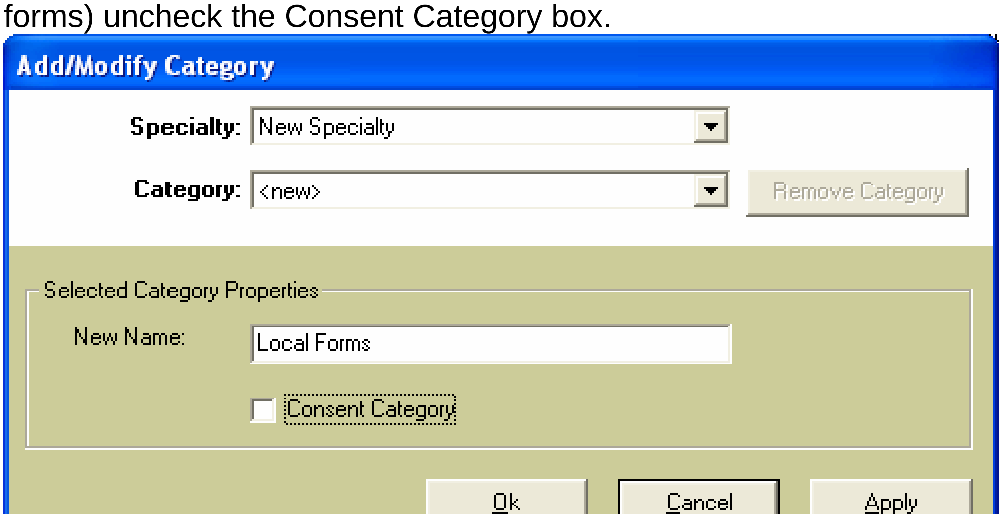
2. When the screen opens, select the newly created Specialty from the drop down list.



3. Click <new> in the Category drop down list.

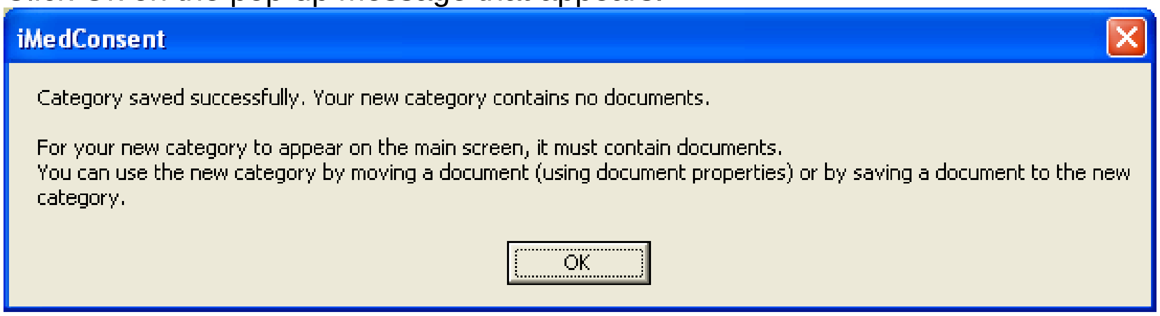
4. Type the name of your Category in the New Name box.

5. If the new category is for non-consent documents only (education or local forms) uncheck the Consent Category box.



6. Click OK button.

7. Click Ok on the pop-up message that appears.



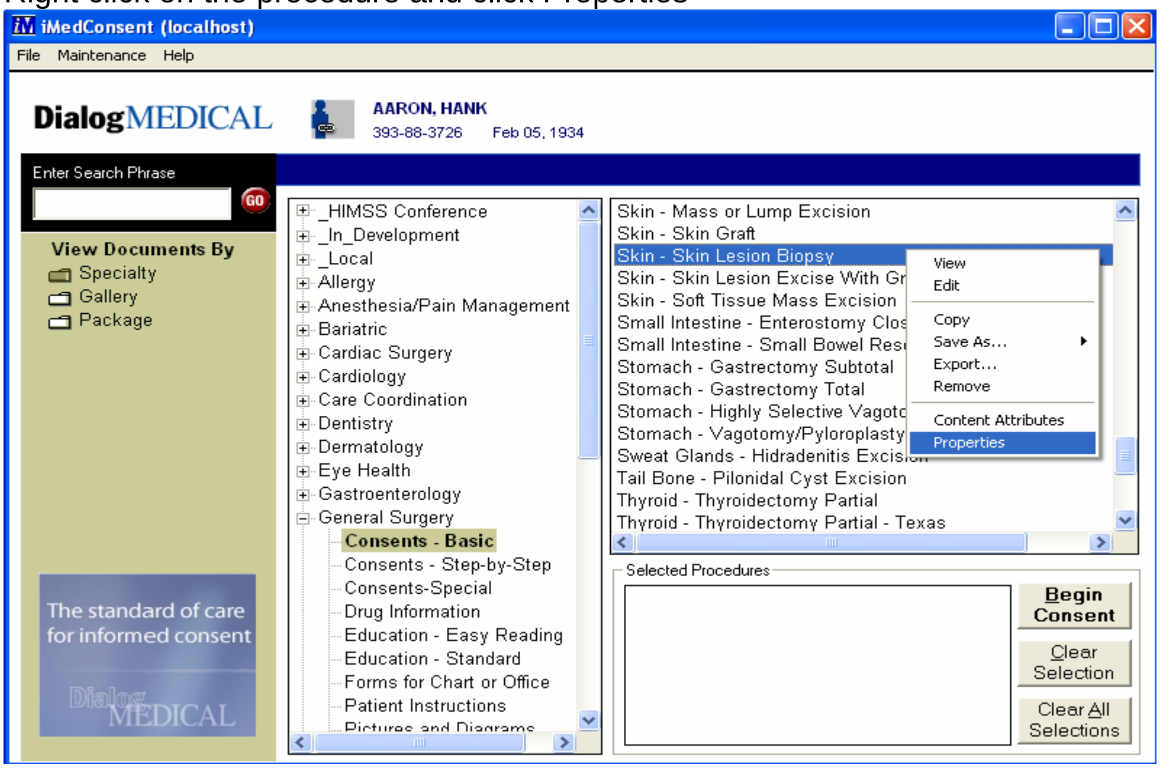
8. Your new Category has been saved.

9. You must now move documents into the new category so they will appear on the main screen.

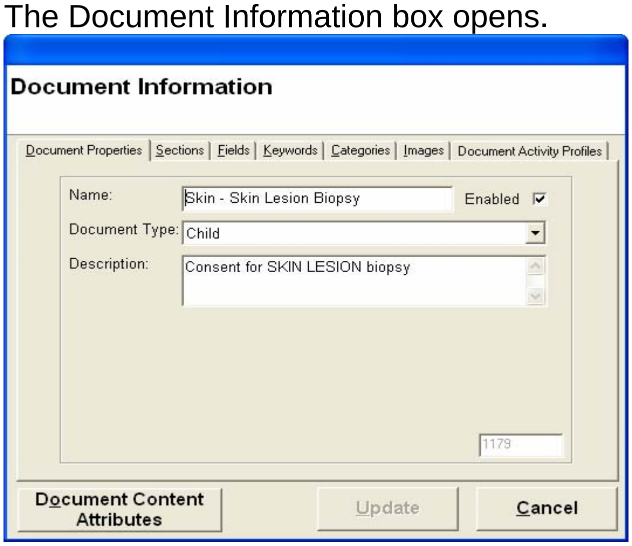
How Do I Share and Move Consents and Non Consents?

There may be situations where you want a procedure in one specialty to exist in another specialty as well. To "share" this procedure, follow these steps.

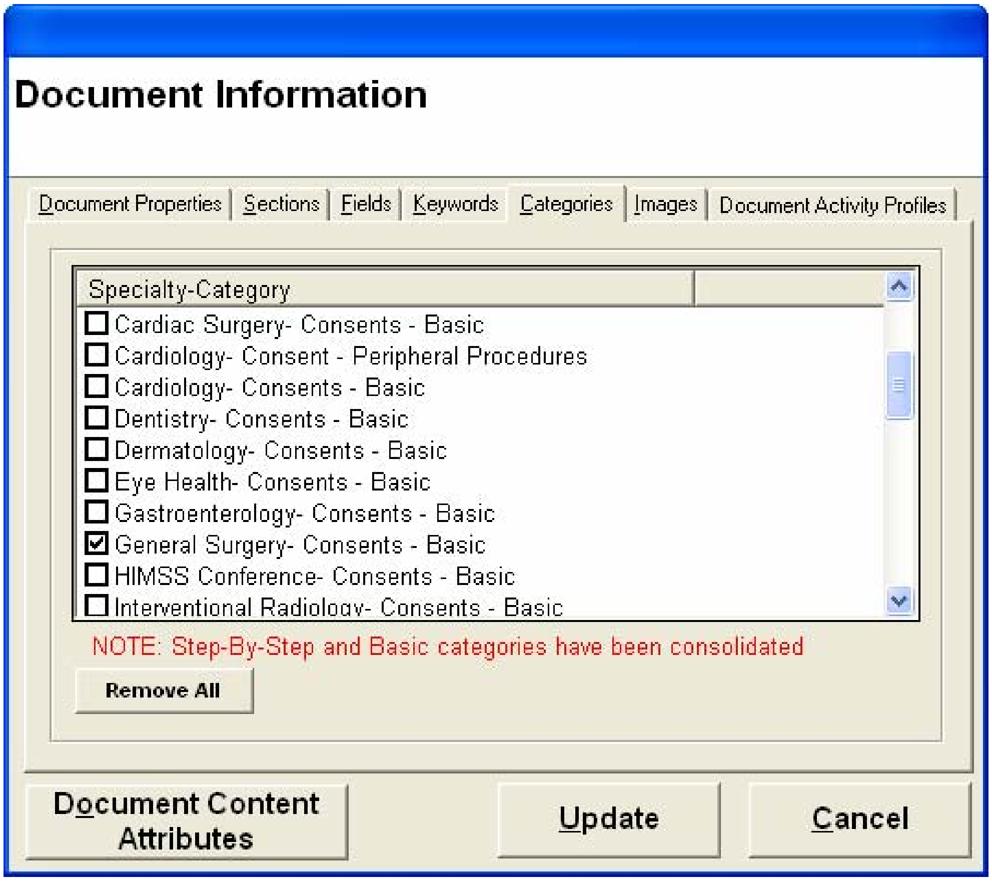
1. Right click on the procedure and click Properties



2. The Document Information box opens.



3. Click the Categories tab



4. Check the Categories where you want the procedure to appear.

5. Click Update to save your changes.

How Do I Locate the Error Log?

If you encounter an iMedConsent error on a workstation and need to call technical support, it is helpful to copy the contents of the error log for that workstation. To find the error log, follow these steps:

For PC's:

1. Go to the folder where iMedConsent is installed on the machine. (This is usually **C:\Program Files\Dialog Medical\iMedConsent VA**)
2. Double-click the **Error.log.** This is a text document that will open in Notepad.
3. Copy and paste the contents of this error log into an email and send to enterprise@dialogmedical.com.

For Thin-Clients:

1. Contact your Citrix Server administrator to retrieve the contents of the error log.

How Do I Set Up My Favorites?

The Favorites feature gives the user the ability to focus on those documents that he or she uses frequently. Users now have the ability to create a list of documents for easy access that is saved under their user login name. Users can add/remove documents from their personal "Favorites" as needed.

There are two ways to access the Favorites Editor Screen.

1. Navigate to Maintenance and select Favorites
2. Once a Favorites list is created, Favorites Editor can be accessed from a button located on the right side of the Favorites View Screen.

Note**** In the Favorites Editor Screen there is a check box "Automatically Add Completed Documents to Favorites". If this box is checked then any signed document will automatically be added to the Favorites list.

To add and remove documents without using Favorites Editor.

- To add a document to Favorites, right click on the document selected and select "Add to Favorites" from the menu
- To remove a document from Favorites, navigate to the "Favorites View Screen", right click on the document selected and select "Remove from Favorites from the menu. If there is only one document listed in a Specialty in Favorites then the Specialty will be removed also. To get the specialty back just add a document to it.

How Do I Create a Utilization Report?

Creating Utilization Reports is a useful tool for capturing data to enable measurement of rate of use of iMedConsent for treatments and procedures for which written consent is required and for which an iMedConsent form is available during a specific time period.

The default date range for this report is from the beginning of the current month through the current day.

NOTE: Only events that occur after the deployment of the **v3.8.1, build 347d** will be recorded on the report. You will not be able to query events that occurred in past releases.

The following information is populated in a CSV file that can be opened in Excel;

- Date
- Specialty
- Document
- Patient Info (this can be omitted via a selection choice)
- Category
- Sections Changed
- Signing Practitioner

To run the utilization report, select Maintenance → Report