

DocView Implementation Checklist
Midway Data Systems

| Practice Information | |
|--|--|
| Practice Name | |
| Billing Address: Attn, Street, City, State Zip | |
| Practice primary contact person (name, email, work, cell) | |
| Practice Website URL | |
| What IP address(es) will our system see traffic from for users at your <u>practice</u> when accessing DocView via the internet. <i>(Only these IP addresses plus the hospital IP addresses will have access to DocView.)</i> | |
| Names of delivering providers (please list ALL and please double-check spelling). <i>Hospital staff will use this list to access your practice's patients.</i> | |
| Greenway Site Number | |
| Contract Signed Date | |
| Business Association Agreement Signed Date | |

| Hospitals at which your physicians deliver | |
|---|--|
| Hospital Name, City, State | |
| What IP address(es) will our system see traffic from for users at the hospital when accessing DocView via the internet. <i>(either forward this question to a hospital IT contact or have them contact us.)</i> | |

| Application Settings | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|----------------------|------------|-------------------|----------------|-----|-------|-------------|-----|-------|----------|-----|-------|------------|-----|-------|-------------|-----|-------|----------------|-----|-------|---------------|-----|-------|------------|-----|-------|-------------|-----|-------|--------------------|-----|-------|---------------|-----|-------|
| Hospital staff see a list of patients that have a practice-defined Flag set via Clinical Alert. Please use the instructions below to set up a flag and Clinical Alert. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Enter the NAME of the Patient Flag you created: | <i>(example: Prenatal records avail in DocView)</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| List two patient ID's that have this Patient Flag set: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| List two patient ID's that do NOT have this Patient Flag set. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Document List: Please indicate which <u>Greenway-defined</u> Document Types you want included in the prenatal packet. <i>Please include at least one Patient ID that has these documents associated with them for testing purposes.</i></p> | <table border="1"> <thead> <tr> <th><u>Document Type</u></th> <th><u>Y/N</u></th> <th><u>Patient ID</u></th> </tr> </thead> <tbody> <tr> <td>Correspondence</td> <td>Y/N</td> <td>_____</td> </tr> <tr> <td>Custom Note</td> <td>Y/N</td> <td>_____</td> </tr> <tr> <td>H&P Note</td> <td>Y/N</td> <td>_____</td> </tr> <tr> <td>Misc. Note</td> <td>Y/N</td> <td>_____</td> </tr> <tr> <td>Orders Note</td> <td>Y/N</td> <td>_____</td> </tr> <tr> <td>Procedure Note</td> <td>Y/N</td> <td>_____</td> </tr> <tr> <td>Progress Note</td> <td>Y/N</td> <td>_____</td> </tr> <tr> <td>Quick Note</td> <td>Y/N</td> <td>_____</td> </tr> <tr> <td>Triage Note</td> <td>Y/N</td> <td>_____</td> </tr> <tr> <td>Prenatal Flowsheet</td> <td>Y/N</td> <td>_____</td> </tr> <tr> <td>Lab Flowsheet</td> <td>Y/N</td> <td>_____</td> </tr> </tbody> </table> | <u>Document Type</u> | <u>Y/N</u> | <u>Patient ID</u> | Correspondence | Y/N | _____ | Custom Note | Y/N | _____ | H&P Note | Y/N | _____ | Misc. Note | Y/N | _____ | Orders Note | Y/N | _____ | Procedure Note | Y/N | _____ | Progress Note | Y/N | _____ | Quick Note | Y/N | _____ | Triage Note | Y/N | _____ | Prenatal Flowsheet | Y/N | _____ | Lab Flowsheet | Y/N | _____ |
| <u>Document Type</u> | <u>Y/N</u> | <u>Patient ID</u> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Correspondence | Y/N | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Custom Note | Y/N | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| H&P Note | Y/N | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Misc. Note | Y/N | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Orders Note | Y/N | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Procedure Note | Y/N | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Progress Note | Y/N | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Quick Note | Y/N | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Triage Note | Y/N | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Prenatal Flowsheet | Y/N | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Lab Flowsheet | Y/N | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Please list all <u>Non Greenway-defined</u> Document Types (please verify the spelling matches the Document Type spelling you defined in PrimeSUITE) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Maximum Retrieved Document Age : <i>e.g., 365 days</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Patients with "Restricted" flag or "Sensitive" flag are NOT visible in DocView. Practices wishing them to be visible will need to remove the "Restricted" or "Sensitive" flag.

Flag and Clinical Alert Setup

- In Registration / Patient Flags Administration, click the Clinical Alerts tab
- Click the Plus sign to create a flag
- Select Category "Clinical Alerts"
- Enter a label for the flag, anything will work but we recommend something like what is shown
- Hit the Right arrow.
- Pick an image and save the Flag

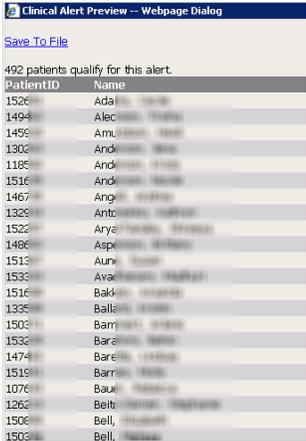
Create a Clinical Alert

On the Chart Clinical Alerts window, set up the Clinical Alert with values like shown (or specific for your practice if desired).

Preview Alerts

For the Clinical Alert you just created, hit Preview Alert and hit OK.

A list of patient ID's qualified for the Alert will display.



The screenshot shows a web browser window titled "Clinical Alert Preview -- Webpage Dialog". Below the title bar is a "Save To File" link. The main content area displays the text "492 patients qualify for this alert." followed by a table with two columns: "PatientID" and "Name". The table lists patient identifiers and names, such as 1526 Adaj, 1494 Alec, 1459 Amu, 1302 And, 1185 And, 1516 And, 1467 Ang, 1329 Antc, 1522 Arys, 1486 Aspi, 1513 Aun, 1533 Avax, 1516 Bak4, 1335 Balie, 1503 Barn, 1533 Bara, 1474 Bare, 1519 Barr, 1076 Bau, 1262 Beitt, 1508 Bell, and 1503 Bell.

| PatientID | Name |
|-----------|-------|
| 1526 | Adaj |
| 1494 | Alec |
| 1459 | Amu |
| 1302 | And |
| 1185 | And |
| 1516 | And |
| 1467 | Ang |
| 1329 | Antc |
| 1522 | Arys |
| 1486 | Aspi |
| 1513 | Aun |
| 1533 | Avax |
| 1516 | Bak4 |
| 1335 | Balie |
| 1503 | Barn |
| 1533 | Bara |
| 1474 | Bare |
| 1519 | Barr |
| 1076 | Bau |
| 1262 | Beitt |
| 1508 | Bell |
| 1503 | Bell |