Optum Physician EMR Administration Module Setup Guide for Clinical Toolbar
Purpose of this Document

This document is a guide through Optum Physician EMR’s “Practice”, “Clinical” and “Setup” tabs in the Administration Module that are relevant to using the Clinical Toolbar in the medical record.

What you will learn and be trained for is:

- The required setup functions to ensure appropriate access to features and functionality for operators
- Optional setup features and functions to customize your Optum Physician EMR company
Pre-requisite Recorded Trainings and Tasks

• The following tasks are required before proceeding to Clinical Toolbar administration setups:

• View trainings:
  • Clinical Toolbar I and II
  • QuickPicks

Go to HELP drop-down → Online Training→ Browse Catalog → Self-paced recorded trainings

• Complete EMR Training Task Workbook for Clinical Toolbar
Topics

Administration → Clinical Tab

Administration → Setup Tab

Note: Optum Physician EMR Medical Practice Setup Guides may not apply to all companies. Please review HELP; then check with your EHR Implementation Specialist or Optum Physician EMR Support to determine if extra setup or tasks are necessary.

*The order of these slides are grouped together by alike tasks to assist with the setup activities.
Detailed Recorded Setup Training

Detailed recorded trainings on setup and use have been created for some of the functionality described in this presentation.

You will be directed to visit HELP to complete the recorded training before beginning the setup of the functionality.

For comprehensive training: HELP drop-down → Online Training → Browse Catalog → Self-paced recorded trainings
Favorite Lab

This feature allows for a practice to create a list of frequently used facilities. These facilities will be in a drop down menu for your selection when creating new lab orders.

You can also view the Connections module for your facilities. Connections is Optum Physician EMR’s list of global facilities. The Favorite Lab Maintenance allows you to save lab facilities you use frequently from the Optum Physician EMR’s list of global facilities.

**NOTE:** The provider listed in your Operator Batch will display. If no provider, you can select one from the Provider Drop Down List

- After a provider has been selected, click the ADD NEW button
- “ALL LABS” lists Global Lab facilities also listed in Connections
- Some facilities have ‘their’ lab test compendiums (test name dictionaries) included
- If adding a Favorite Lab from the global list, it will also include the facility’s compendium to be used when creating favorite orders
- When added, enter your facility’s account number and fax number
- Click Save
View List of Favorite Facilities in Administration

In Favorite Lab Maintenance; after adding facilities to a provider’s favorite list –
Click “Lab Name – Account Number” drop down to view list

Click “List Order”. Click name of facility to highlight and select arrow key to move up / down on view list.
View List of Favorite Facilities in Orders (medical record)

- Open a Test Patient’s chart and click on the Order icon in the Clinical Toolbar

- Order with No Selected Facility and Favorite Orders Listed are Test Names from the Optum Physician EMR compendium
Order Sets

An Order Set is a grouping of patient orders for a specific diagnosis or condition. Creating an order set, instead of creating individual orders, helps standardize patient care, expedite order entry, and reduce delays due to inconsistent or incomplete orders.

- Go to Administration → Clinical Tab → Daily Administration section → Order Set

You can also access Order Sets to use or maintain them from the patient’s medical record in the Clinical Tool Bar.
Order Sets

- Click “NEW” to create an Order Set
- Data enter “Set Description” to name your order set
- Select “Provider” if ONLY for one
- “Save For” Group or Company
- Search by “Type” and add all orders

Please review HELP drop-down → Online Training → Browse Catalog → Self-paced recorded trainings
Order Set Example

Order Set: **Annual Female Exam**

- Lab Orders: Pap, CBC
- Procedure: Biopsy
- Imaging: Bone Density

NOTE: To “modify” an order set; click the name to open dialog box
Order Questions

Optum Physician EMR provides the ability to set up additional fields to display in lab order forms. This helps your practice to include custom information required when creating an order.

- “Field Description” – data enter the order question
- “Order Type” - select the type or order for the question to be asked of
- When writing a new Order; only the order questions will appear by order TYPE
- Click “Save”
Order Questions

- When creating a new Order, click “Custom Order Questions from within the medical record to answer the questions
- Only questions with responses will print on lab order slip
- Responses/Answers print below “Patient Notes”
Copy Favorite Lab Locations & Tests

- After creating a favorite list of facilities for one provider; use the “Copy Provider Favorites” feature to reproduce the list for all other providers
- Go to Administration → Clinical Tab → Maintenances → Copy Provider Favorites
- Add a check to each item to copy
- Click Save

For more information how to create Favorite Order Lists please review HELP drop-down → Online Training → Browse Catalog → Self-paced recorded trainings
Creating Lab and Imaging Favorite Orders

• If creating a LAB favorite order list for a facility with a lab compendium; select the facility from the drop down first

• If create a LAB favorite list for a facility without a lab compendium, you do not need to enter the facility’s name in the drop down – Optum Physician EMR’s global test name compendium will be used to find favorites

• After adding lab favorites; change the Order Type to Imaging and search for imaging tests

• Procedure Order Type includes both procedures and DME
Lab Account Numbers

If each of your providers have distinct lab facility account numbers; select ADD to enter account number to the facility Per Provider

Can also select ‘All Providers” if account number is shared
Manage Immunizations

- The Manage Immunization Lots application enables you to manage immunization lots for a group.

- The system keeps track of the inventory and deducts administered vaccinations from the lot quantity.

- Inventory tracking by the system ensures that required vaccinations can be reordered in a timely manner.

- You can modify lots, make lots inactive, and delete lots as necessary in the Manage Vaccination Lots application.
Manage Immunization Lot

To keep track of number of doses in a lot; enter the Immunization Lot details.

Go to Administration → Clinical Tab → Daily Administration section → Manage Immunization Lot.

Complete All Fields and press SAVE.
Manage Immunization Lot (Deactivate)

When the lot is completed, return to Administration and click the “edit” button to the ‘right’ of the lot row. At the bottom, select “NO” next to active and select a reason from the drop down. Press Save.
Select Immunization Lot (medical record)

Displays list of lots when ordering from the Clinical Toolbar-Immunizations
Immunization Administrators

The Immunization Administrator Maintenance application allows you to specify which resources are displayed in the “Administered By” field when entering an immunization in the medical record.

**Note:** If the operator is flagged as a provider in their operator profile, the provider’s name is selected by default. You can flag an operator as a provider in the Operators & Roles application in the Administration module.
Immunization Administrators

- Go to Administration → Clinical → Maintenance →
- Immunization Administrator Maintenance
- Select the checkbox next to each resource that is authorized to administer immunizations
- Click Save. Each name selected will appear in the "Administered By" field when entering an immunization in the medical Record module
Clinical Letter Editor

• The Letter Template application provides the ability to create clinical letter templates for your company or group

• Clinical Letters are created by “type” so some letters can have different parts of the patient’s record attached or incorporated into the letter

Please review HELP Drop-Down→ Browse Catalog → Self-Paced Learning → Clinical Letter Editor
Patient Education Upload

- Practice specific or customized education can be uploaded to order from the patient’s medical record
- Upload “Patient Education” that will display as a selection in the medical record → Patient Education → “Tree”
- Add “Title; Language; and System Area” of the patient education
- Browse for scanned file
- Click “Store”
- Education can be selected from the medical record → patient education
You can access patient education materials from the Clinical Toolbar. Pre-loaded Krames Patient Education materials are also available.

Provide Patient Education Information, MU M19
Use certified EHR to identify patient-specific education resources and provide to patient if appropriate.
Creating Lab and Imaging Favorite Orders (medical record)

- Creating Imaging, Procedure and Durable Medical Equipment (dme) favorite lists is the same as creating Favorite Lab Test List.
- Change the “Order Type” and search for favorites
- Navigate to a “test” medical record
- Click on “Order” from the Clinical Toolbar
  - Create an encounter, select ‘TYPE’ as Other

For more information how to create Favorite Order Lists please review HELP drop-down ➔ Online Training ➔ Browse Catalog ➔ Self-paced recorded trainings
Company Logo

Your company logo can be uploaded and will print on all orders and patient education; it will print when included on practice management and clinical letters:

Go to: Administration → Setup Tab → Practice Management → General section → Company Logo link

- File types include Jpeg, GIF, or PNG
- Logo height is .60
- Logo width is 1.50
- Scan logo file onto desktop and click the “browse” button to search
- Click the “upload” to upload into Optum Physician EMR
Conclusion & Next Steps

1. You should have completed either the live or recorded training session for Clinical Toolbar training
2. Be sure you have completed all of the sections of the EMR Training Task Workbook for Clinical Toolbar
3. Your “Administration” setup activities for Clinical Toolbar module can now be completed
4. Next, you should discuss/review your setup activities with your implementation specialists during your next weekly status meeting
5. To continue your training and module setups, attend either the live or recorded training session for Health History Panes
6. Refer to the Health History Pane setup document