CORI²

CLINICAL OUTCOMES REPORTING INFORMATICS

Administrator Instructions for Use

Manufactured by

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1 Introduction

1.1 Site Administrator

CORI² Site Administrator is the term CORI² personnel use to refer to the primary administrative contact in the GI department at the practice site. The Site Administrator is responsible for managing various aspects of the software including maintaining staff records *(see Staff Page)* and their permissions, lists of instruments, medications, procedures, and diagnoses. Additional functions are creating patient handout and referral letter templates and determining some default system settings. Typically, the Site Administrator is the first person users should contact regarding CORI². If necessary, the Site Administrator contacts CORI² Site Services to resolve any issues beyond the scope of day-to-day administration.

1.2 Staff Record Management

The Site Administrator creates, edits, and deletes staff records in CORI². In addition to entering identifying information, the Site Administrator activates and deactivates staff, assigns permissions to each staff member and determines to which associated sites (if any) a staff member may have access.

1.3 Permissions

The Administrator sets the permission levels for each staff member to provide security in CORI². The task of setting permissions on different functions within CORI² is made easier through the use of Security Templates.

1.4 Instruments, Medication, Procedures and Diagnoses Lists

CORI² makes use of several lists of items used in procedures. The Site Administrator manages the content of these lists, which determines how the items are displayed in the procedure reports. *(See Administration Page for more information).*

1.5 Printed Materials Templates

Procedure reports in CORI² can be accompanied by patient instructions handouts and physician referral letters. These are composed of blocks of text which are included as desired. The document templates and the blocks are managed by the Site Administrator.

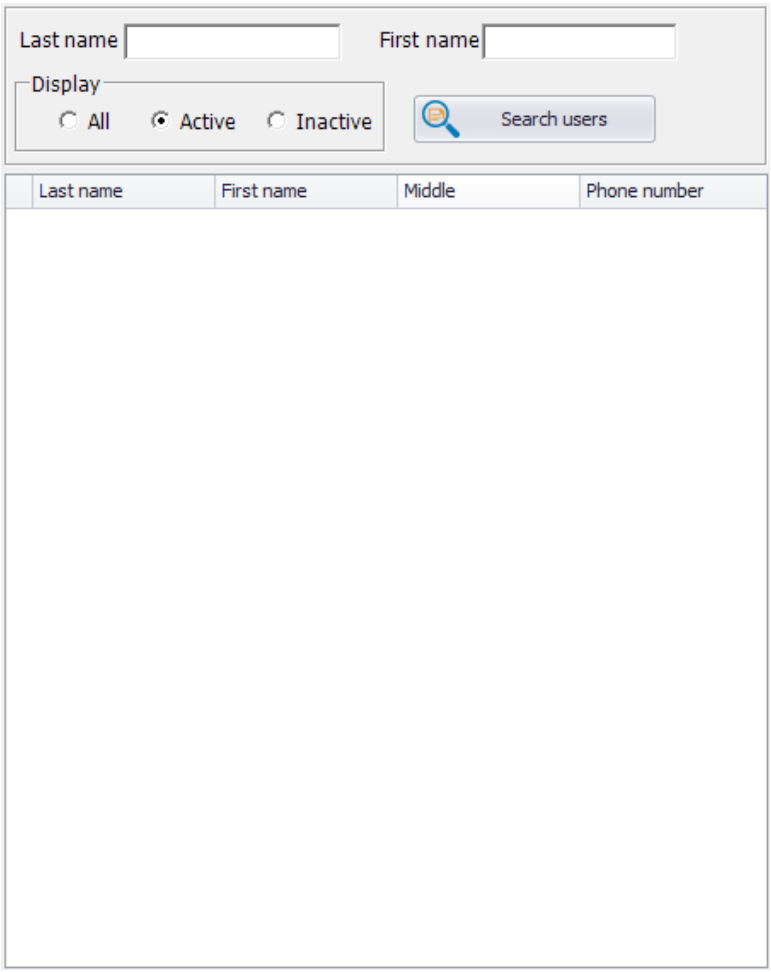
1.6 System Settings

Settings that determine certain aspects of CORI² operation are managed by the Site Administrator.

These include whether the Social Security Number (SSN) or patient identifier appear on the Patients page, the procedure codes, diagnoses codes and other lists, and the business hours for the Scheduling page. Information on these and other settings appears throughout the *Administration Page* chapter.

2 Searching Records in CORI²

Many pages and screens throughout CORI² provide an area for searching records. The search functionality is nearly identical, differing only in the available search criteria and the information displayed in the Search Results display. A typical search area is displayed below:



2.1 General Notes on Searching

All record management functions must begin with a search.

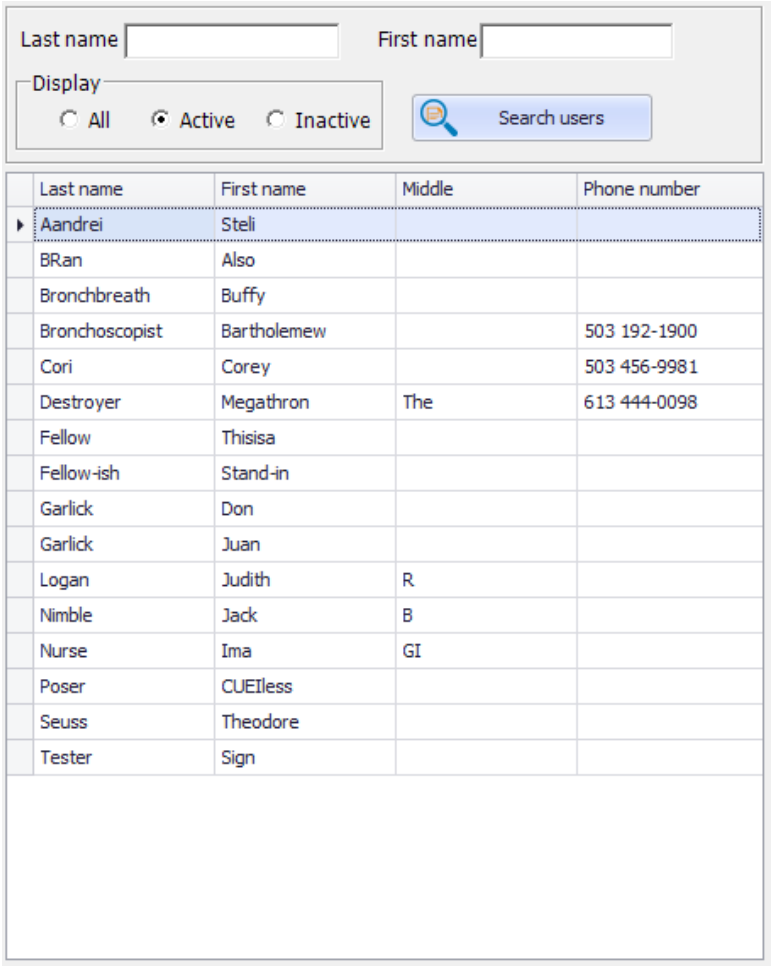
While it is possible to perform a search without entering any search criteria, it is strongly recommended to search using criteria.

Searching should be done with increasing specificity. For example, begin a patient search with a few letters of the last name. With common last names, use the entire last name and one or two letters of the first name. Use more letters or additional criteria to narrow down a large search result. If a search produces no results, remove letters or individual criteria and search again.

2.2 Conducting a Search

To conduct a search:

1 Enter search criteria as needed.
2. Click SEARCH USERS.
3. Results are displayed in the Search Results display.



4. Click on a column header to sort the displayed results by that column. Alternate clicks will reverse the sort order.

5. To sort the entire result, right-click anywhere in the Search Results display and select a column name to sort by.

NOTE: *The sort order is indicated by letters next to the column name: DESC appears if the current order is ascending, and ASC appears if it is descending. Selecting the same column name again will reverse the sort order.*

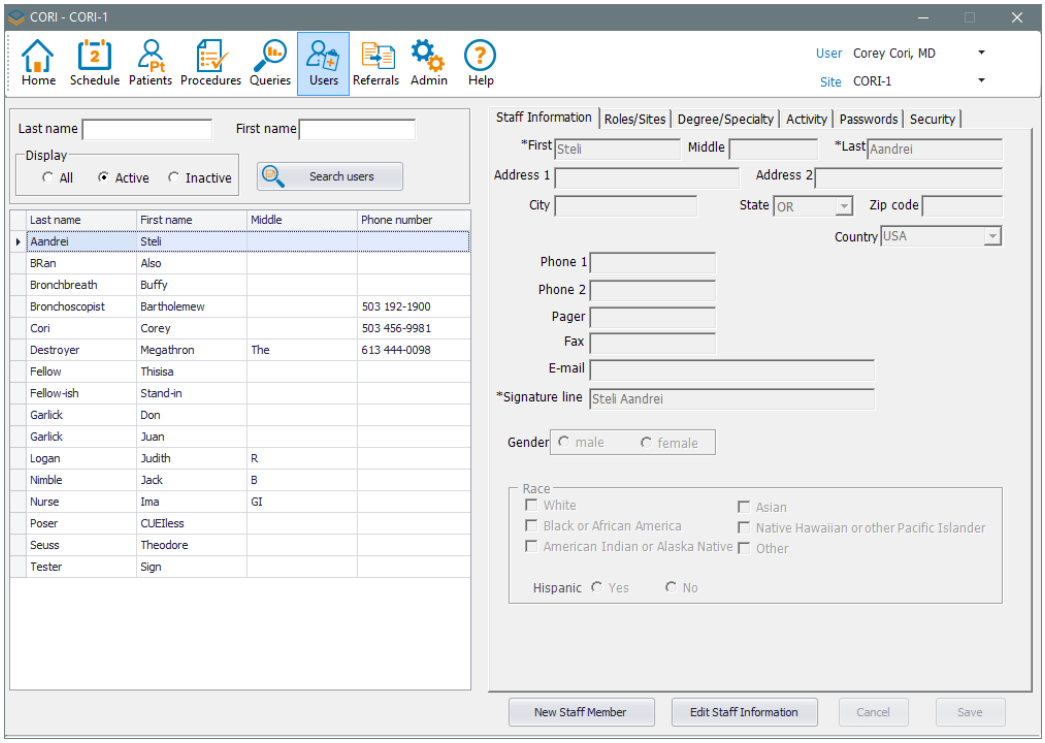
6. Click on a row in the search results to display the record details.

3 Staff Page

Staff records are required for any person at the practice site who will use CORI² or be listed as personnel in a procedure report.

The First (name), Last (name), and Signature line fields are required to save a staff record, however, to be useful it must also include a Username, Password, Security permissions, and be set to Active. Additionally, records for personnel who will be listed in a procedure must include a role (Endoscopist or Bronchoscopist) and a CUEI *(see CORI² Unique Endoscopist Identifier – CUEI).*

For a staff member to be able to sign any part of the procedure report, their staff record must have one of the signing permissions *(see Permissions and Security Templates).*



4 Creating or Editing a Staff Record

To create or edit a staff record:

1. Perform a search as described in *Searching Records in CORI².*

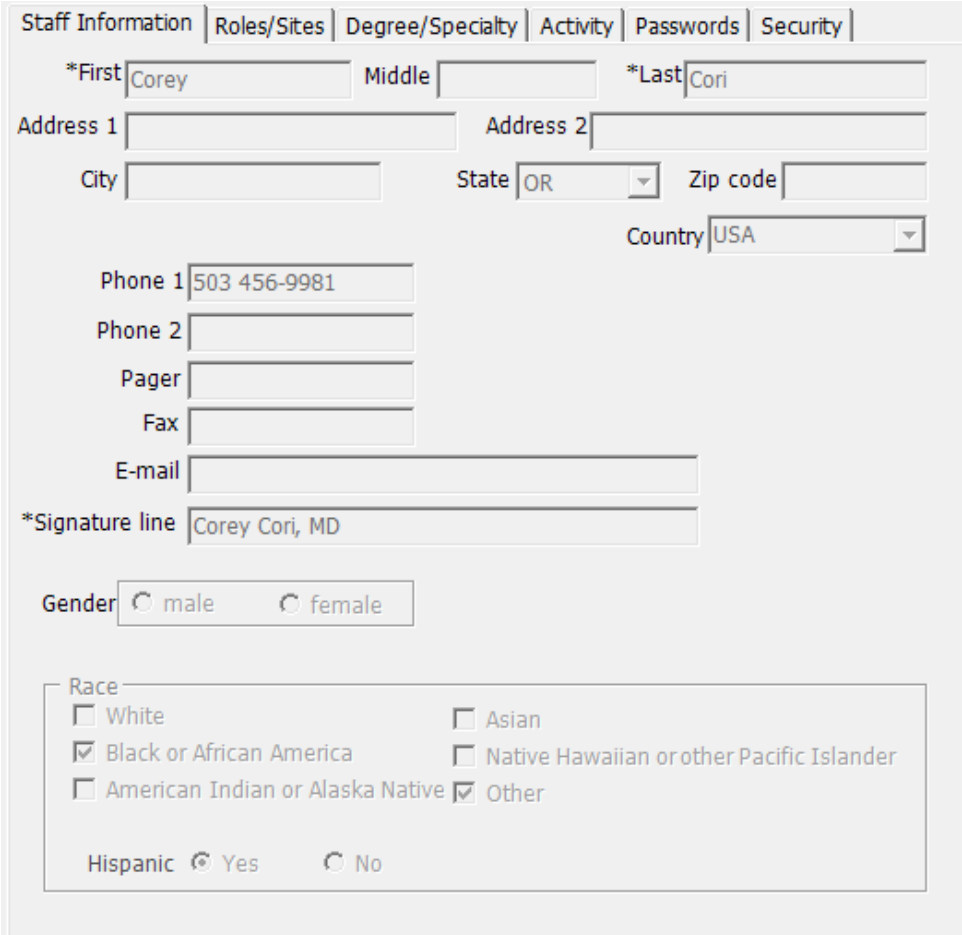
2. Click NEW STAFF MEMBER to create a new record or EDIT STAFF INFORMATION to edit an existing record.
3. Enter or change information as needed.
4. Click SAVE to save the record or CANCEL to discard all changes.

4.1 Staff Record Tabs

Staff record information is spread over several tabs, each containing specific information. Below are descriptions and images of the tabs.

4.1.1 Staff Information

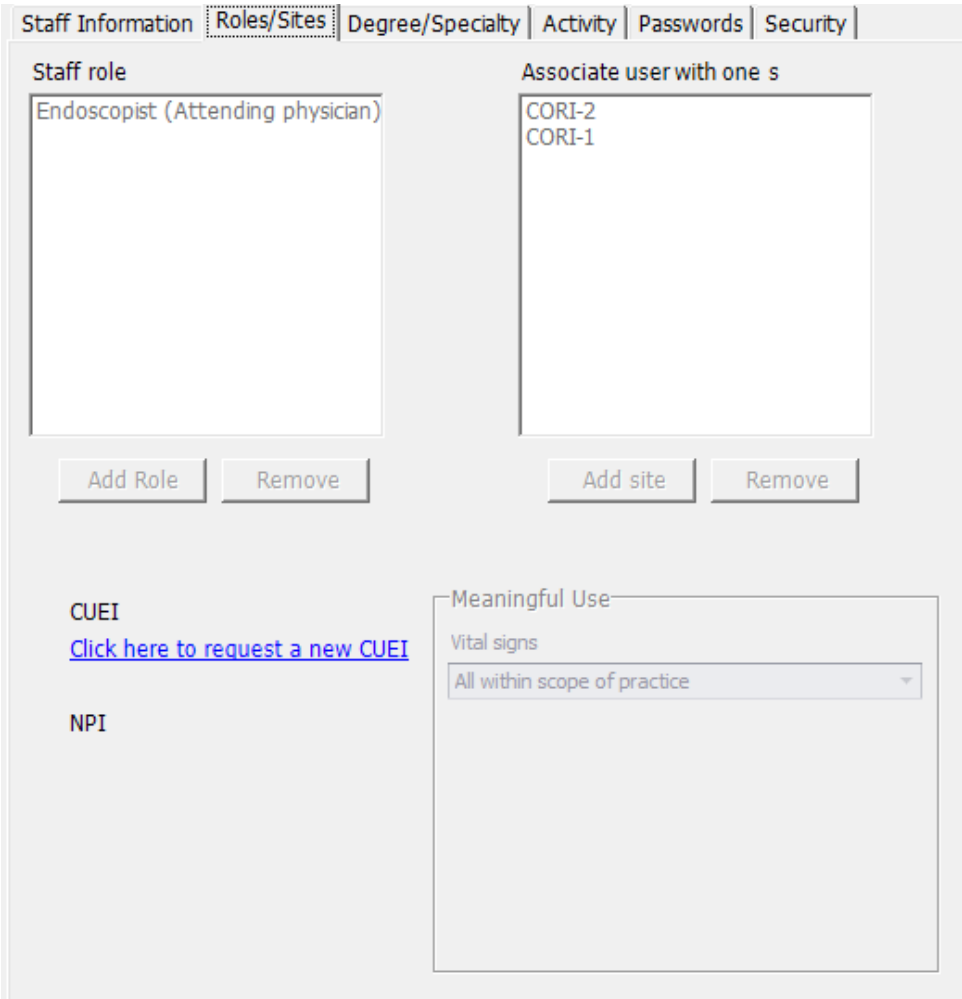
The Staff Information tab contains basic information about the staff member. The First, Last and Signature line fields are required to save the record. Completing the First and Last fields automatically fills the Signature line field.



4.1.2 Roles / Sites

The Roles / Sites tab contains the staff roles and associated sites lists. Staff roles determine how the staff member will appear on a procedure report. If a CORI²

installation has multiple associated sites (see below), the staff record can be assigned to additional ones.



4.1.3 Staff Roles

The Staff Roles tab identifies users that will be listed in a procedure record. There are over 25 staff roles that can be used to identify a staff member.

Endoscopists and Bronchoscopists must have a staff role in their record to be listed and identified as a Responsible Endoscopist or Bronchoscopist. It is not required to identify users who will not be listed in the procedure record.

4.1.4 CORI² Unique Endoscopist Identifier (CUEI)

To uniquely identify doctors that perform procedures in CORI², their staff record must include a CUEI. This is required for any staff record that has an Endoscopist or Bronchoscopist staff role. A CUEI can be requested from CORI² by clicking the link "Click here to request a new CUEI" in the Roles / Sites tab or by completing the CUEI

Website Request Form at www.cori2.com. This is usually handled by the Site Administrator.

4.1.5 Associated Sites

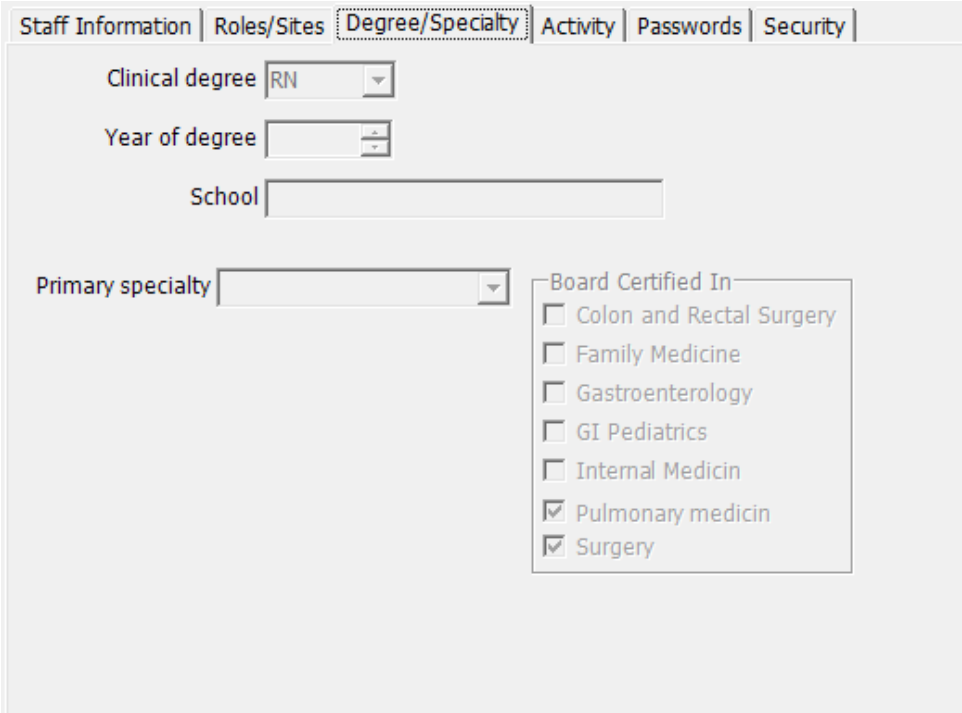
CORI² allows one or more practice sites to maintain their CORI² facility on a single installation.

This allows separate practices using the same network or server to maintain their data while minimizing maintenance and administration. Many endoscopists practice at multiple CORI² sites. The sites are not formally associated within CORI² until such a relationship has been established within the software. This requires the assistance of CORI² personnel and is usually done at installation.

4.1.6 Degree / Specialty

The Degree / Specialty tab displays the Clinical Degree, Year of Degree, School (University), Primary Specialty and certification information. Completing information in the Degree / Specialty tab is optional.

If the Clinical Degree is completed, the Signature line field on the Staff information tab will display automatically.

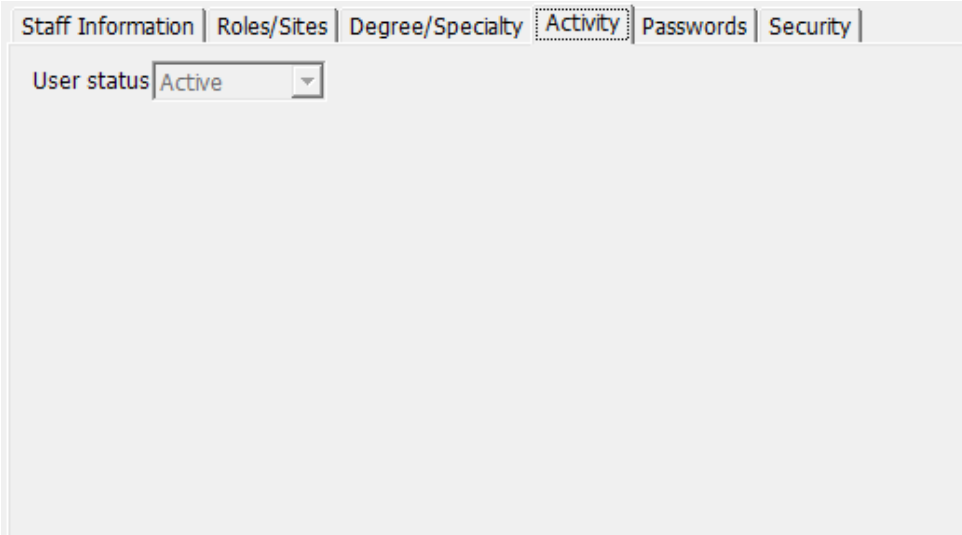


4.2 Activity

The Activity tab displays the User Status of a staff record.

Setting the staff record to "Active" allows the Staff member at your site to be added to the Procedure Personnel for the Procedure report. All Staff records set to "Active" appear in the active staff record search.

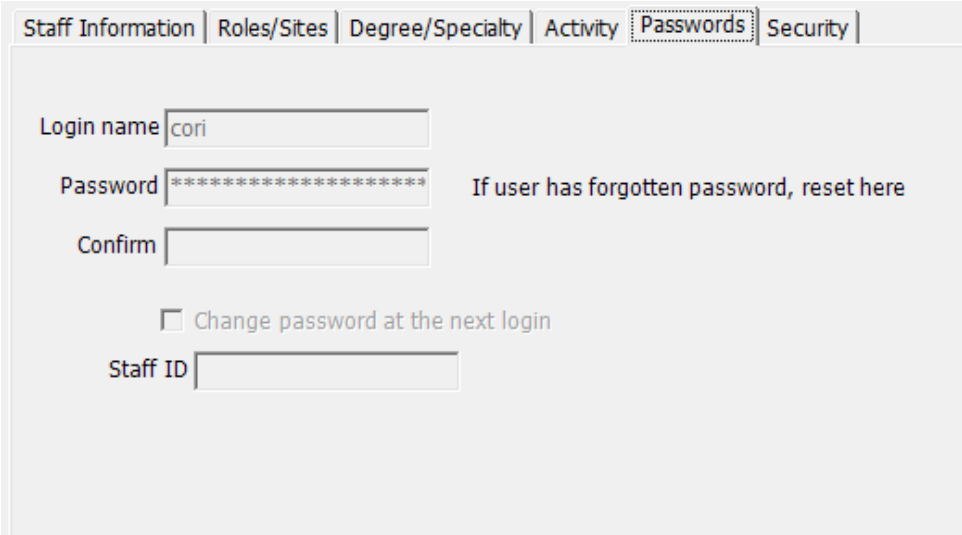
Setting a staff record to "Inactive" removes the record from the Procedure Personnel table and from Staff record searches when only active records are searched.



4.2.1 Passwords

The Passwords tab displays the staff member's Login Name and Password as well as identifies if the password must be changed at the user's next login.

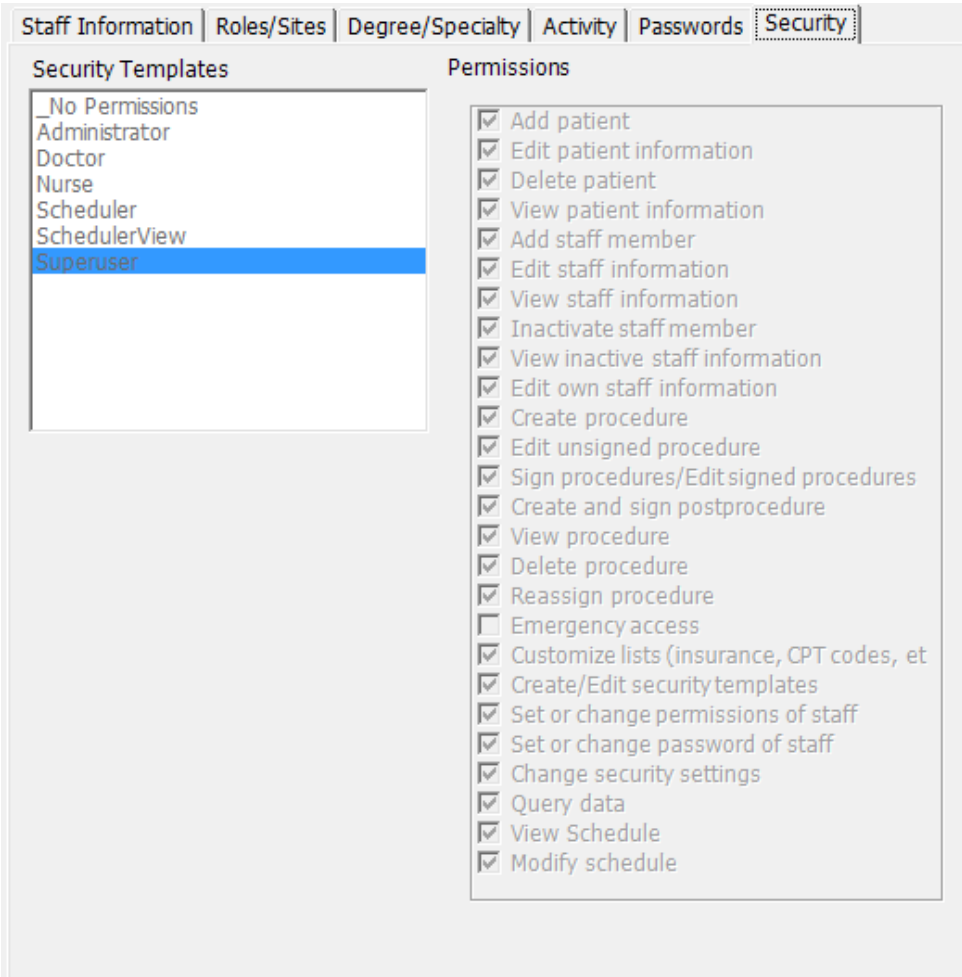
Passwords are reset from this tab.



4.2.2 Security

The Security tab displays the security template and security permissions assigned to the staff member. Security templates are used to assign multiple permissions at once.

Permissions not affected by the template can be granted or revoked individually on this tab.



4.3 Active and Inactive Staff Records

Staff records are associated with procedure records. Staff records cannot be deleted as this would change the data for a past procedure record.

When a user is no longer employed or a user of CORI² the staff record is designated as Inactive and will not appear in the Procedure Personnel table in the Pre-procedure section.

Users with the View Inactive Staff permission see an option group in the Staff Page search area that allows a staff record search to be limited to Active staff, inactive staff, or both.

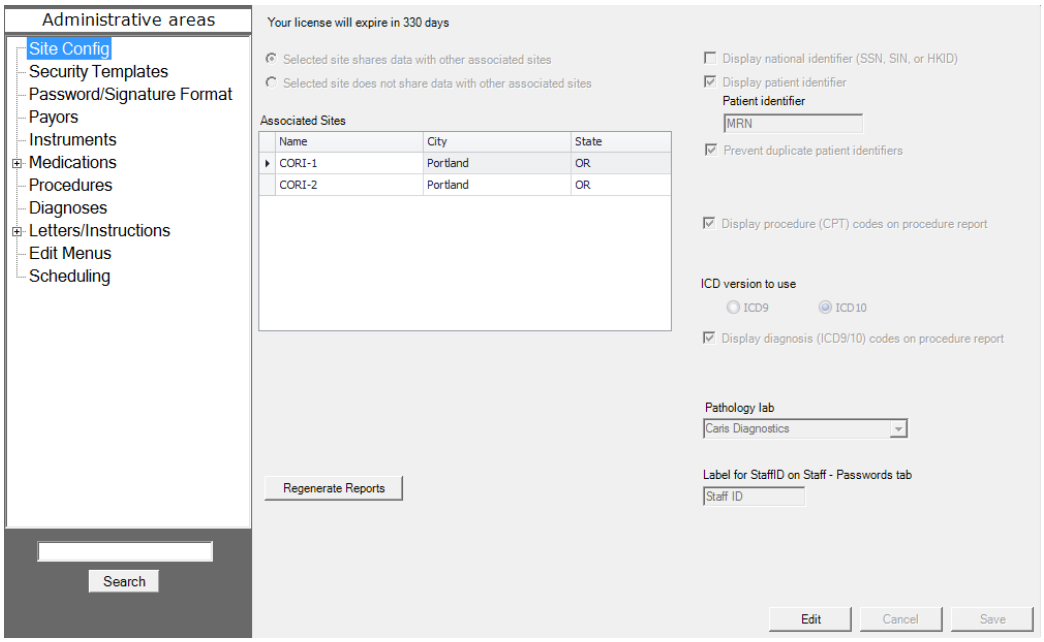
5 Administration Page

The Administration page is where settings for CORI² functions are set and modified. The Site Administrator manages this page. Few if any additional users are given access (via several permissions) to the page.

The Administration Page information is spread over several sections, each containing specific information. Below are descriptions and images of the sections.

5.1 Site Configuration

The Site Configuration section is where the details of the CORI² license are visible, including Associated Sites. Option to enable and display patient identifiers, CPT and ICD codes are also located here, as well as Pathology lab and Staff ID labeling.



5.2 CORI² Licensing

CORI²'s Site License is viewable at the top of the Site Configuration section of the Administration page. This box displays the number of days remaining with the CORI² user license.

Your license will expire in 325 days

Licensing is configured by CORI² Site Services during set up and anytime the site license is updated. If the site license has not been renewed and is within ten days of expiring, all Administrators within CORI² will be notified and directed to contact CORI² Site Services.

To add or remove an associated site, please contact CORI² Site Services.

To edit an associated site's configuration settings:

1. Select a site's row to modify settings for that site.
2. Click EDIT at the bottom of the window.
3. Change settings as needed. Individual settings are discussed below.
4. Click SAVE to save the settings, or DELETE to discard all changes.

Selected site shares data with other associated sites: When selected, data such as patient and procedure records are visible to users at all sites listed on this page.

Selected site does NOT share data with other associated sites: When selected, data such as patient and procedure records are not visible to users at the sites listed on this page. The information is visible only to users at the selected site.

Display national identifier on Patients page: When checked, displays the national identifier (SSN, SIN, HKID, etc.) on the Patients page.

Display patient identifier on Patients page: When checked, displays the patient identifier (described below) on the Patients page.

> ***NOTE:*** *If displayed this will be a required field.*

Patient identifier field: Displays the label for the patient identifier as it appears in the Patients page. MRN is the default, but this can display any desired text. For proper appearance on the Patients page, the text should be limited.

Display Procedure (CPT) codes on procedure report: When selected, displays the code associated with the "Procedure performed" selection from the Procedure section of the report. If not selected, only the text is displayed.

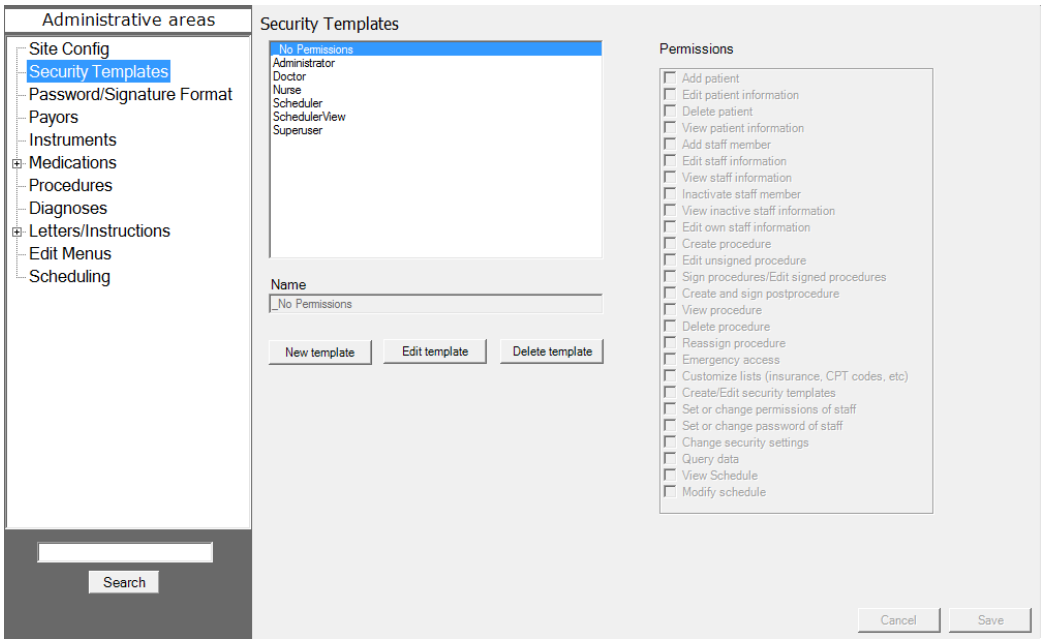
Display diagnosis (ICD10) codes on procedure report: When selected, displays the code associated with the diagnosis selected within the Findings section of the report. If not selected, only the text is displayed.

Pathology Lab: Indicates the pathology lab that will be used for pathology imports using a custom interface. While there are only a few interfaces listed currently, CORI² can interface with other pathology management systems via HL7.

Regenerate Reports: Allows signed reports to be regenerated in the event of a slight error. This is initiated by CORI² Site Services with the Site Administrator.

5.3 Security Templates

Permissions allow users access to various parts of CORI². Security templates are collections of permissions and are used to easily and consistently assign specific sets of permissions to staff members.



Several security templates are included by default in CORI².

Security templates can be edited; however, new templates can be created to suit specific needs.

To create a new security template:

1. Click NEW TEMPLATE to enter a name for the new template.
2. Select all permissions desired for the template.
3. Click SAVE in the lower right corner to save the record, or CANCEL to discard all changes.

To edit an existing template:

1. Select a template from the Security Templates list.
2. Click EDIT TEMPLATE.
3. Select and deselect permissions as desired.
4. Click SAVE in the lower right corner to save the record, or CANCEL to discard all changes.

To delete a template:

NOTE: *A template can only be deleted when no staff records are associated with it.*

1. Select a template from the Security Templates list.
2. Click DELETE TEMPLATE.
3. Click YES at the request confirmation dialog.
4. Click OK in the confirmation dialog.

Staff members can be assigned a security template, which can then be individually customized using the Security tab on the Staff page.

The individual permissions are:

Add patient - Creates a new patient record.

Edit patient information - Modifies an existing patient record.

Delete patient - Removes a patient record.

View patient information - Displays a patient record.

Add staff member - Creates a new staff record.

Edit staff information - Modifies an existing staff record.

View staff information - Views all staff records.

Inactivate staff member - Deactivates a staff record.

View inactive staff information - Displays active or inactive staff records.

Edit own staff information - Modifies the staff record of the user currently logged in.

Create procedure - Creates a new procedure record.

Edit unsigned procedure - Modifies an existing unsigned procedure record.

Sign procedures / Edit signed procedures - Signs or modifies a signed procedure record.

Create and Sign post-procedures - Enters post-procedure data and signs off on the change.

View procedure - Displays procedure records.

Delete procedure - Removes a procedure record.

Reassign procedure - Transfers procedures from one patient record to another.

Emergency access - Provides an account the ability to gain view access in an emergency when they don't normally have view patient & procedure permission.

Customize lists - Modifies application lists such as payors, medications, etc.

Create/Edit Security templates - Creates new security templates.

Set or change permissions of staff - Modifies staff record permissions.

Set or change passwords of staff - Modifies staff record passwords.

Change security settings - Modifies password/signature requirements located in the password/signature format tab.

Query data - Generates reports against local CORI² data.

View Schedule - Displays information on the Schedule page.

Modify schedule - Modifies information on the Schedule page.

5.4 Password and Signature Format

Use this tab to set security standards for passwords and electronic signatures used in CORI². The Change Security Settings permission is needed to access this tab.

To change password / signature formats:

1. Select Password or Signature.
2. Click EDIT in the lower right corner of the tab.
3. Make changes as needed. See below for descriptions of the settings.
4. Click SAVE to save the record, or CANCEL to discard all changes.

The individual Requirements are:

Minimum Length – The minimum number of characters in the password / signature.

Reuse - Allows a password / signature to be reused after this many changes.

Good for (days) - Forces the user to change password / signature after this many days.

Bad logins limit – Determines the number of failed login attempts before suspending the account.

Minimum number of - Determines the number of each character type that must be in the password / signature.

Password Hint – Determines the message displayed when users change their password / signature but fail to meet the security requirements (e.g. "Password must be six characters, and include letters and numbers.")

5.5 Payors

The Payors section identifies the entities responsible for payment of procedures. Payor information is displayed on the Patient record and is offered for convenience. It does not affect the patient record or procedure data. Payor information can be put on the procedure report by CORI² Site Services if desired.

To create a new Payor:

1. Click NEW at the bottom of the tab.
2. Enter payor information as needed.
3. The Type list allows the selection of 3 payor types. It is possible to enter a different payor type at the top of the control, but it will not be saved in the dropdown list.
4. Click SAVE to save the new payor or click CANCEL to discard it.

To edit an existing Payor:

1. Select the desired payor's row in the list at the left of the tab.
2. Click EDIT at the bottom of the tab.
3. Edit the payor information as needed.
4. Click SAVE to save the changes or click CANCEL to discard them.

To delete an existing Payor:

1. Select the desired payor's row in the list at the left of the tab.
2. Click DELETE near the bottom of the page.
3. Click YES to confirm deleting the payor.

5.6 Instruments

The Instruments section maintains the list of instruments used during procedures. The instrument name, serial number and the procedures in which it can be used are entered here.

To create a new instrument:

1. Click NEW at the bottom of the tab.
2. Enter instrument information as needed. Assigning a procedure type to an instrument causes it to display in the instruments list in the corresponding procedure report.
3. Click SAVE to save the new instrument or click CANCEL to discard it.

To edit an existing instrument:

1. Select an existing instrument from the list on the left of the tab.
2. Click on at the bottom of the tab.

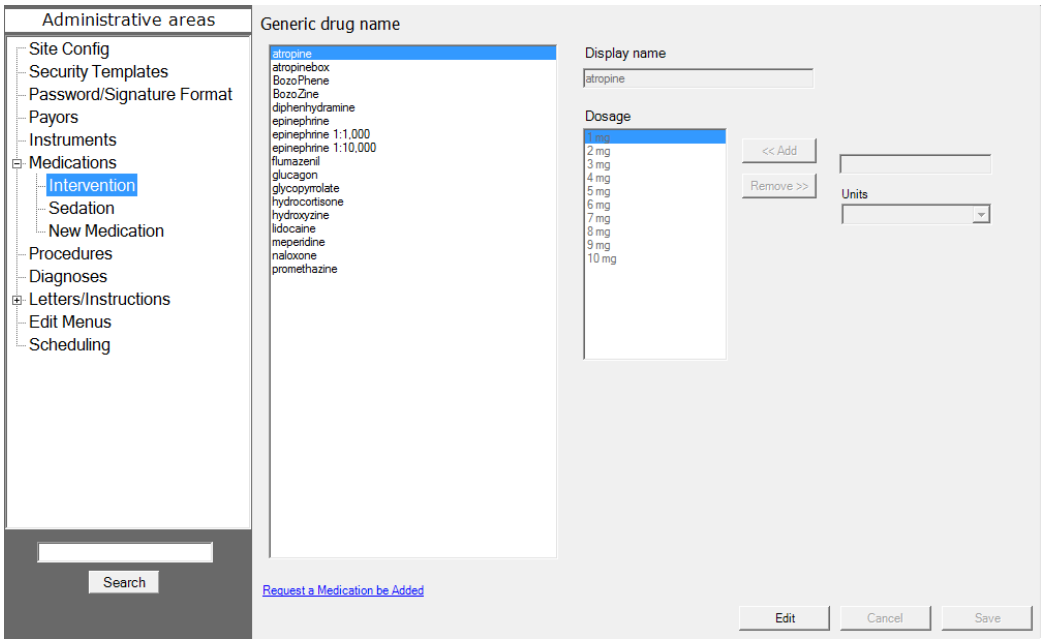
3. Edit the instrument information as needed.
4. Click SAVE to save the changes or click CANCEL to discard them.

To delete an instrument:

1. Select an existing instrument from the list on the left of the tab.
2. Click DELETE near the bottom of the page.
3. Click YES to confirm deleting the instrument.

5.7 Medications

The Medications section is for managing the lists of medications used during procedures. This tab is subdivided into three tabs, which specify where the medications are entered into the procedure report.



NOTE: *Medications themselves cannot be added or removed in this tab. It is used only for changing the dosages and names of the medications as they are displayed in the procedure report sections and the printed procedure report. To request a new medication, click the "Request a Medication be Added" link.*

5.7.1 Editing a Medication

To edit a medication:

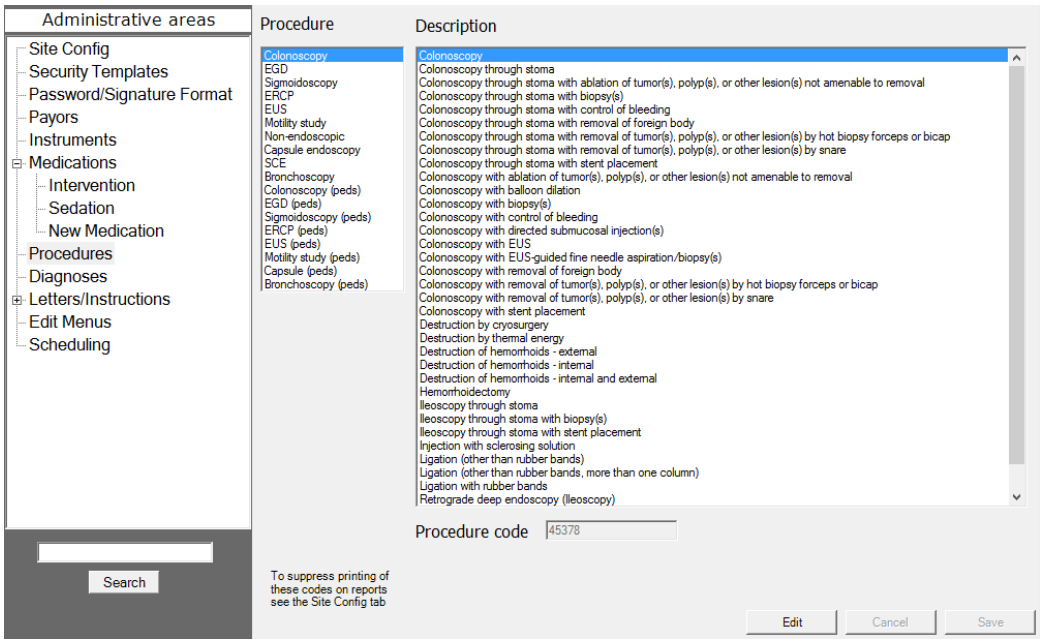
1. Click on the desired category of medication.
2. Select a medication from the list.

NOTE: *In the New Medications list select the medication class in the left list, and then select the actual medication in the center list.*

3. Click EDIT at the bottom of the tab.
4. Edit the Display Name text box to change how the medication name is displayed throughout CORI².
5. To add new dosage options for the medication, the dosage amount into the text box, then select the type of units from the Units drop-down menu.
6. Click ADD.
7. To remove dosage options for the medication select the dosage from the Dosage list and click REMOVE.
8. Click SAVE to save the changes or click CANCEL to discard them.

5.8 Procedures

The Procedures section is where numeric codes are assigned to specific procedures. CORI² uses CPT codes by default. These codes can be changed to reflect the practice site's particular coding policy.



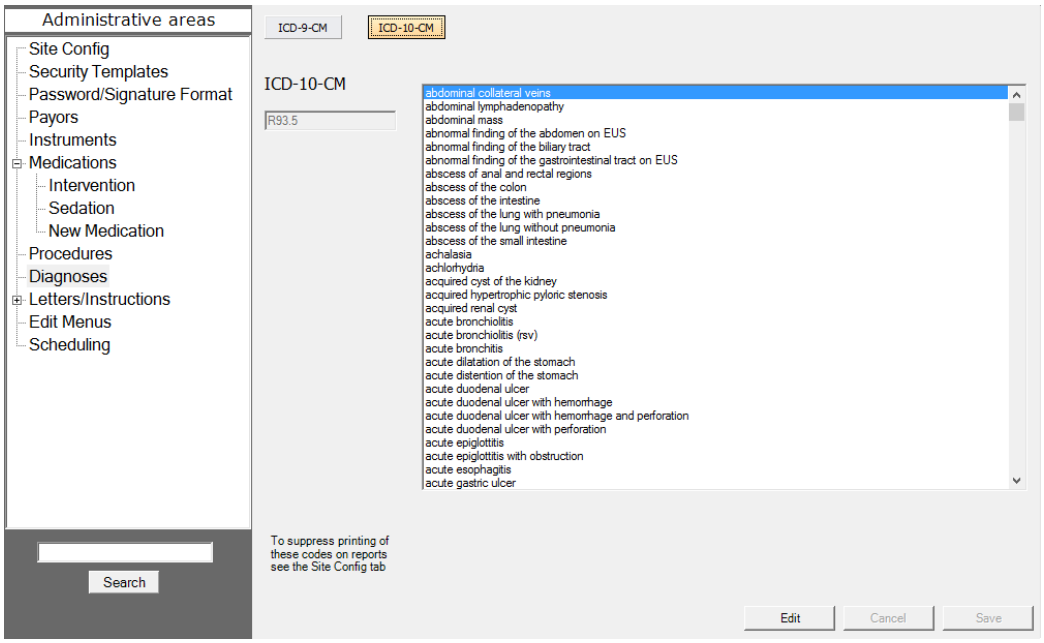
5.8.1 Editing a Procedure Code

To edit a procedure code:

1. Select the procedure type from the list on the left to display its associated procedures.
2. Select a procedure description from the list to display its associated code in the Procedure Code text box in the upper right of the tab.
3. To edit the procedure code, click EDIT at the bottom of the tab.
4. Enter or change the procedure code in the Procedure Code text box.
5. Click SAVE to save the changes or click CANCEL to discard them.

5.9 Diagnoses

The Diagnoses section identifies how numeric codes are assigned to specific diagnoses. CORI² uses ICD10 codes by default. These codes can be changed to reflect the practice site's particular coding policy.



5.9.1 Editing a Diagnosis Code

To edit a diagnosis code:

1. Select a diagnosis from the list to display its associated code in the Diagnosis Code text box in the upper right tab.
2. To edit the diagnosis code, click EDIT at the bottom of the tab.
3. Enter or change the diagnosis code in the Diagnosis Code text box.
4. Click SAVE to save the changes or click CANCEL to discard them.

5.10 Letters/Instructions

The Referral Letters and Patient Instructions section allows the configuration of referral letters and patient instructions. These documents are previewed and printed in the Procedure window, in the Letters / Instructions section.

Referral letters are created for each associated site. Additionally, CORI² can be configured to generate two different referral letters – one to the referring provider and one to copied providers. This capability must be configured by CORI² Site Services.

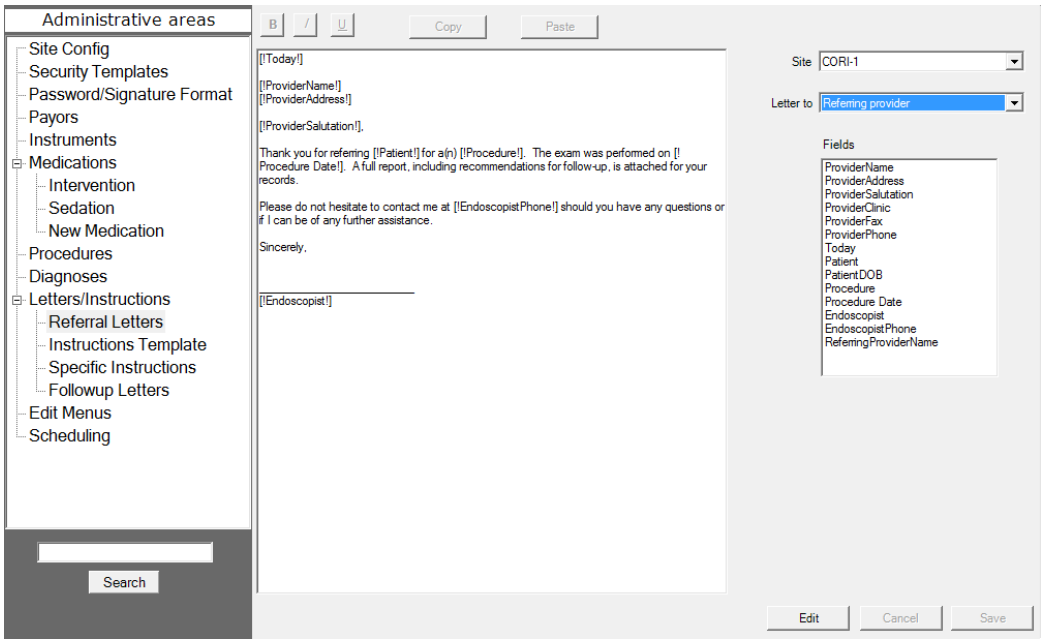
Patient Instructions are created per associated site, for each procedure type, and in different languages. The language choices are determined by the language menu *(see Edit Menus)*.

NOTE: *CORI² does not translate letters between languages. The instructions must be added to these screens in the language desired. The choice of language is arbitrary and indicated by the entries in the Language menu.*

Specific instructions are per site, per language, and per Findings set. Findings sets are differentiated by procedure type, e.g. specific Upper GI sets for both EGD and EUS procedures.

5.11 Referral Letters

Physician referral letters can be viewed and edited within the Referral Letters section.



5.11.1 Editing a Referral Letter

To edit a referral letter:

1. Select the site from the Site dropdown list in the upper right corner of the tab and click EDIT at the bottom of the tab.

   NOTE: *If CORI² is configured for multiple referral letters, select the letter to be edited from the Letter To dropdown as well.*

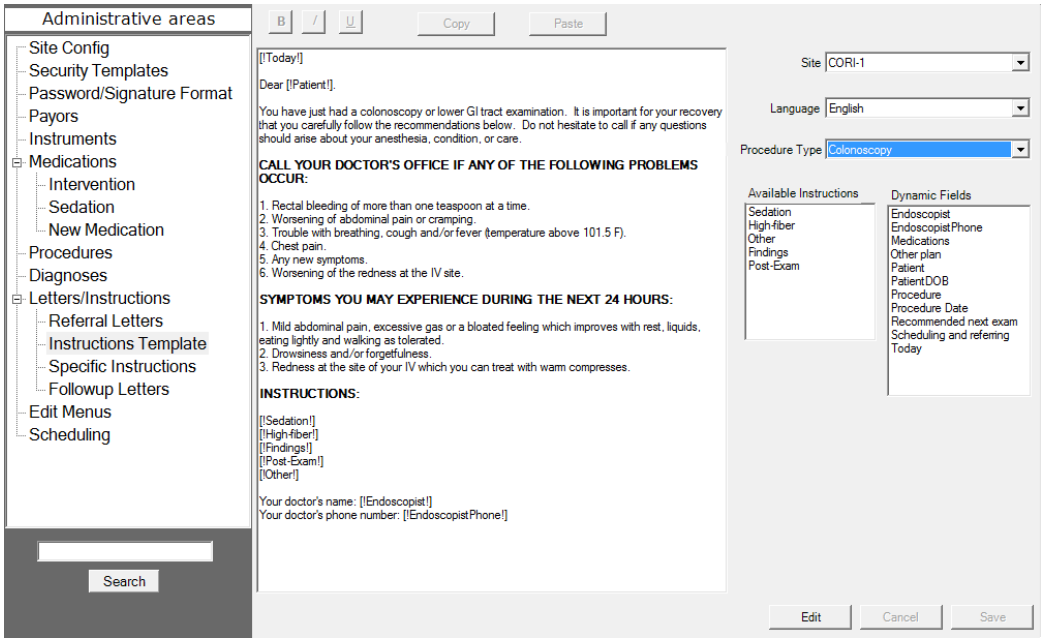
2. Enter the referral letter text in the large text area, or click on to paste text from the clipboard.
3. To add a field to the letter, drag the field name from the Fields list into the text area.
4. Click SAVE to save the changes click CANCEL to discard them.

Fields in the text area are denoted by brackets and exclamation points surrounding the field name (e.g. [!FieldName!]). When moving or cutting a field in the text area, select the entire field.

Basic formatting features can be added to the letter by highlighting the desired text and clicking a formatting button at the top of the letter display. When formatting a field, select the entire field. Adding formatting to part of a field will "break" the field, and cause the name of the field to appear in the letter instead of the intended content.

5.12 Instructions Template

The Instructions Template is used to create the template for the patient instruction handout. It is comprised of typed text, specific instructions blocks and standardized instructions *(see Specific Instructions)*.



The Available Instructions fields determine the location in the handout of information selected in the Letters / Instructions procedure section.

The post-exam instructions and other specific post-exam instructions are added to the patient handout in the Letters / Instructions procedure section. Their location in the handout is determined by the Post-Exam and Other fields, respectively, in the template.

The Findings field adds the specific instructions for each of the findings selected in the Letters/Instructions Procedure section. The specific instruction text is entered for each finding in the Specific Instructions tab, described below. Similarly, the text for Sedation and High-fiber is entered in the Specific Instructions tab, and the location of the text is determined by the fields' location in the template.

5.12.1 Editing the Instructions Template:

To edit the instructions template:

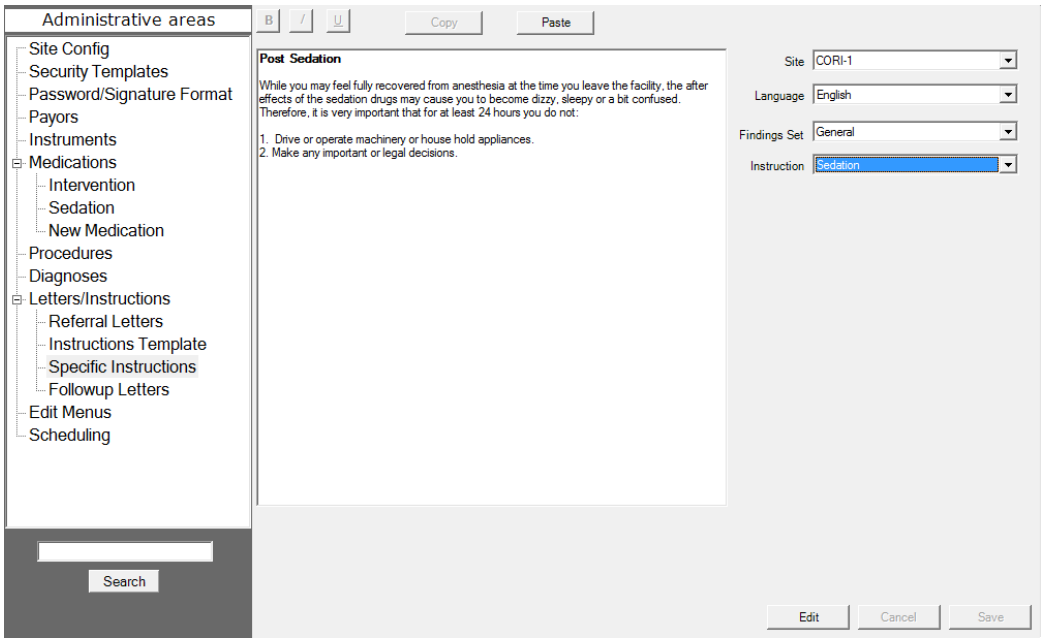
1. Select the site, language and procedure type from the dropdown lists in the upper right area of the tab and then click on near the bottom.
2. Type the instruction text in the large text area.
3. To add a field to the letter, drag the field name from the Available Instructions or Dynamic Fields boxes into the text area.
4. Click SAVE to save the changes or click CANCEL to discard them.

Fields in the text area are denoted by brackets and exclamation points surrounding the field name (e.g. [!FieldName!]). When moving or cutting a field in the text area, select the entire field.

Basic formatting features can be added to the letter by highlighting the desired text and clicking a formatting button at the top of the letter display. When formatting a field, be sure to select the entire field. Adding formatting to part of a field will "break" the field, and cause the name of the field to appear in the letter instead of the intended content.

5.13 Specific Instructions

Specific Instructions are created in this section for each finding in each procedure and for the standardized instructions in each procedure.



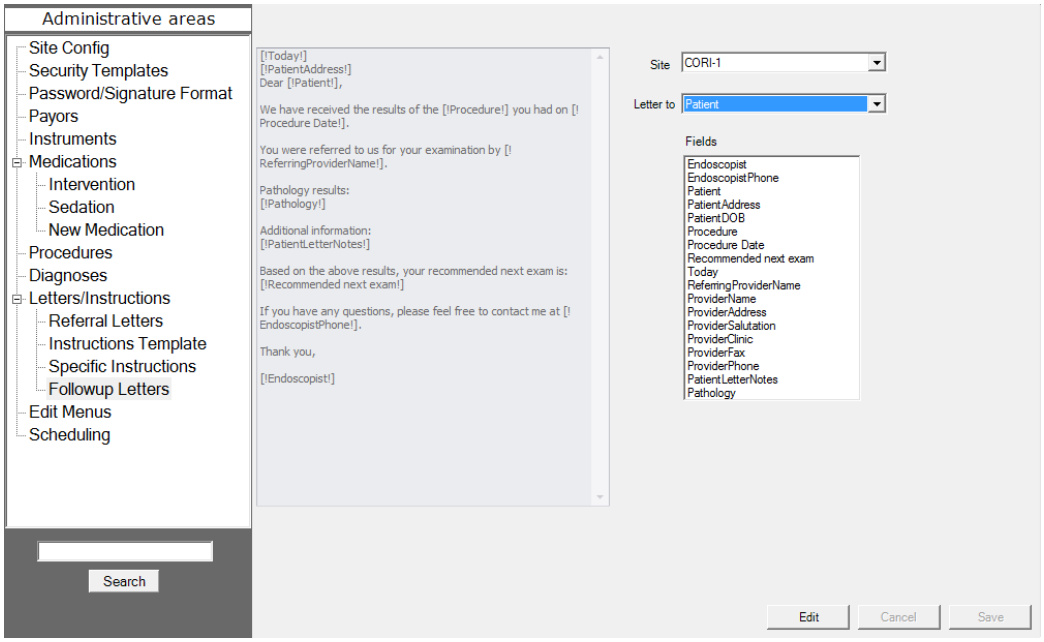
5.13.1 Editing an Instructions Template:

To edit an instructions template:

1. Select the site, language, procedure and instruction from the dropdowns in the upper right corner of the tab and then click on near the bottom.
2. Type the instruction text in the large text area.
3. Click SAVE to save the changes or click CANCEL to discard them.

5.14 Follow-up Letters

Follow-up Letters are standardized forms that can be sent to patients.



5.14.1 Editing a Follow-up Letter

To edit a follow-up letter:

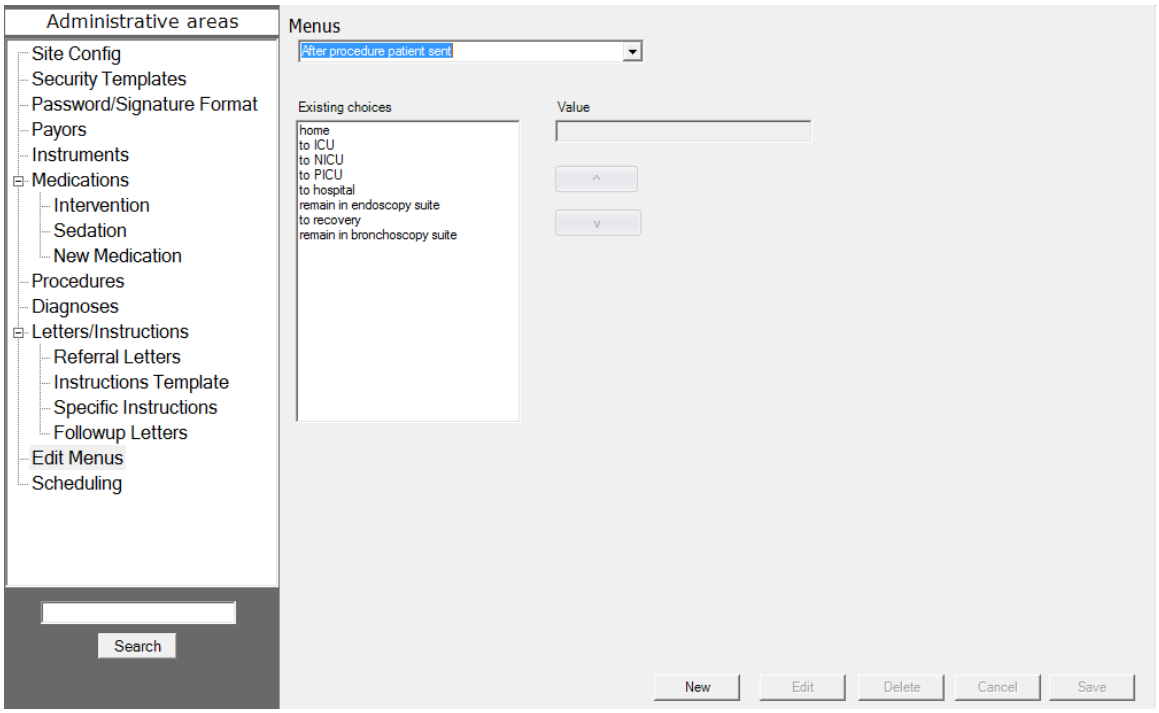
1. Select the site and who the letter is to in the upper right corner of the tab and then click EDIT near the bottom.
2. Type the information text in the large text area.
3. Click SAVE to save the changes or click CANCEL to discard them.

Fields in the text area are denoted by brackets and exclamation points surrounding the field name (e.g. [!FieldName!]). When moving or cutting a field in the text area, select the entire field.

Basic formatting features can be added to the letter by highlighting the desired text and clicking a formatting button at the top of the letter display. When formatting a field, be sure to select the entire field. Adding formatting to part of a field will "break" the field, and cause the name of the field to appear in the letter instead of the intended content.

5.15 Edit Menus

Many of the variables in CORI² are not customizable due to the need to standardize data collection. Some dropdown lists, however, can be configured to suit the needs of the site.



5.15.1 Editing a Menu List

To edit a menu list:

1. Select the desired list from the Menus dropdown list. The choices available in the selected list are displayed in the Existing Choices list.
2. Select an entry to display it in the Value text box.
3. Click EDIT to change the value.
4. Click SAVE to save the new value or click DELETE to delete the value
5. To create a new value in the list, click NEW, enter a new value and click SAVE.

The menus available for editing are:

Language - Allows different sets of patient handouts to be created.

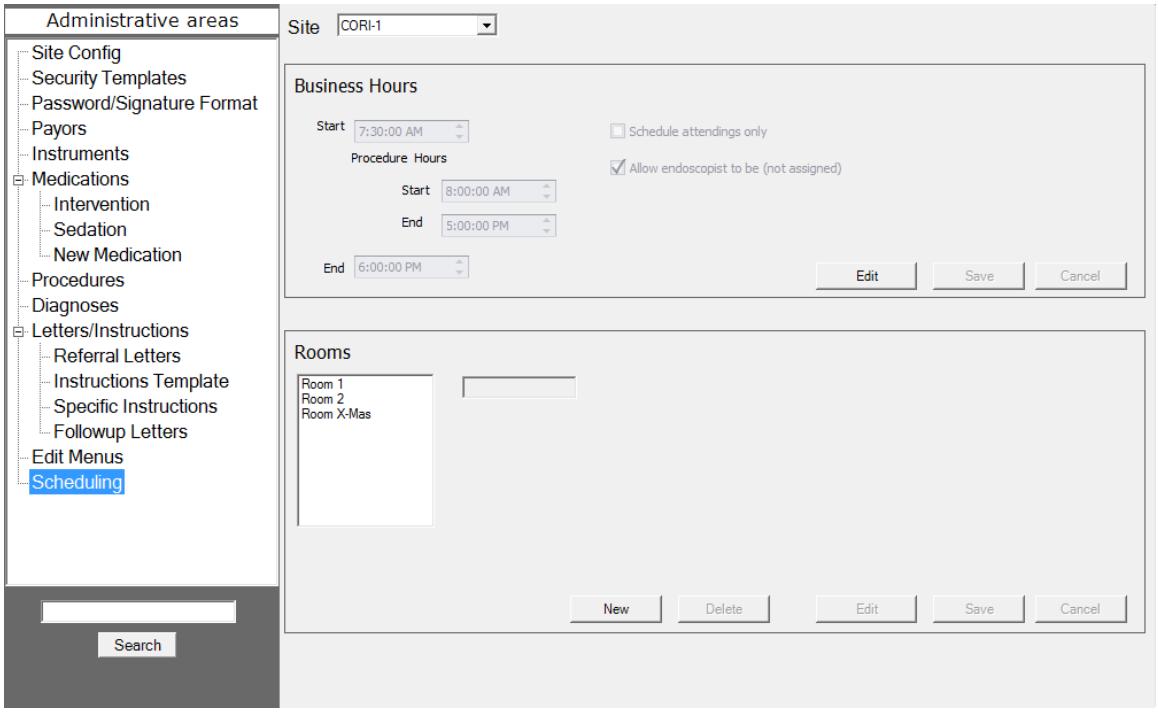
After Procedure patient sent - Allows the ability to list the locations where the Patient is sent following the procedure.

After Recovery patient sent - Allows the ability to list the locations where the Patient is sent following recovery.

Prep Used - Allows the ability to list the Bowel Prep in the procedure.

5.16 Scheduling

The CORI² Schedule page allows appointments for procedures to be scheduled. In addition, appointments can be indicated by room. The time period during which appointments can be scheduled, and the names of the rooms being used, are set on this table.



5.16.1 Setting a Time Range

To set a time range:

1. Select the proper site from the Site dropdown list.
2. Using the four time controls set the business hours and procedure hours for the site.
3. Click SAVE.

5.16.2 Creating a New Room Entry

To create a new room entry:

1. Click NEW to create a new entry.
2. Enter or change the room name in the text box next to the Rooms list.
3. Click SAVE.

5.16.3 Editing an Existing Room Entry:

To edit an existing room entry:

1. Select the room from the Rooms list.
2. Click EDIT.
3. Change the room name as desired in the text box next to the Rooms list.
4. Click SAVE.

5.17 Emergency Access

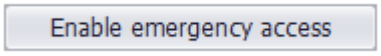
CORI² has an option that allows users with limited permissions to have greater access for a short period of time.

Called "Emergency Access", the user is able to perform their usual tasks, as well as: view procedure, view patient information, and view the schedule. CORI² tracks and logs all behavior by a user when this option is used by a user.

> ***NOTE:*** *This option is off by default, and has to be set up and configured by CORI² before you can use it. It is not a default feature.*

If enabled at your site, a user can turn it on by clicking ENABLE EMERGENCY ACCESS in the upper right hand corner of the screen.

When selected, this is the window that appears.



This can add additional functionality with personnel, but is not turned in the program by default.

5.18 Audit Log

The Activity Log displays all activity that has taken place within CORI² for a set period of time such as user login, the views of patients/procedure by users and any changes made to data inside CORI². To access the Audit Log, go to the Queries section and click AUDIT REPORT. Set the time length (by either Calendar dates or number of days), Staff Member and Event type. The default is 1 day, all staff, all event types.

6 Contact Information

CORI² Site Services can be reached via email at support@cori2.com or by calling 1-888-786-2674.