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Section 1: iCare Overview

The iCare Overview will give users the processes and training guide relating to iCare.

Introduction

The iCare application gives physicians access to their resident population, as well as the entire physician group’s resident population. Prior to logging in to the application, the physician has immediate access to clinical documents that require a signature and/or review. When using their unique pin number, the physician can e-sign these documents and enter orders. Depending on facility processes, the resident’s health record includes medications, treatment orders, attachments (lab), demographics and additional clinical documents, assessments, care plans, and clinical notes.

There are two Physician widgets within Vision. The Resident widget contains the access and view of the residents associated to the physician or the physician group. The Documents to Sign/Review widget contains a listing of documents that require a physician signature or review—for example: Verbal/interim Orders, SBAR, Physician Order Sheets. From the displayed list the physician (using their unique pin number) can sign and review the documents as well as enter orders.

Vision’s iCare (which includes the iCare application and Vision Physician widgets) has three main objectives:

- Extend the electronic health record to the physician, so critical resident information can be viewed, with little or no training
- Improve the communication between the organization and the physician, using real time messaging via Inbox.
- Address productivity and minimize time to review and sign clinical documentation using a secure pin
- Enter orders through iCare to eliminate data entry & confusion from verbal & paper orders.

This document contains the processes and training guide for iCare. The document is divided into the following sections:

- Set-Up: Contains all of the set up areas that are necessary for iCare/Vision Physician Portal.
- Physician/Clinical Training: Contains the Vision Physician View.

Role/Security Rights

An iCare role is already established in the Database. If your database does not have an iCare Role – follow the appropriate process in creating a new role.

Create an iCare User Role

To create an iCare User Role, see the instructions below for proper walk-through. Then Configure favorite for the role can be set by the Organization. It is recommended that organizations set up only one iCare role. Note that if the database already has an iCare/Physician/Care Provider Role, this step is not necessary.
Setting Menu Access Privileges

To determine the overall security rights for roles using iCare, see the instructions below for proper walkthrough. Note that the organization will need to request that iCare Script 25418_UPD be run to activate iCare Premium in their test, train, and production environment.

1. Click Setup
2. Click Security
3. Click Menu Access Privileges under Roles
4. Select iCare under Role(s)
5. Select iCare under Service Module
6. Select iCare under Service Area
7. Click all checkboxes, except Care Plan Oversight (Home Health Only)
8. Click Attachments checkbox, if users wants the physician to add attachments
9. Click Submit
Home Widgets

*Home Widgets* have to be enabled in order for a user to be able to use the Vision iCare widget. To enable *Home Widgets*, see the instructions below for proper walk-through.

1. Click Setup
2. Click Security
3. Click Menu Access Privileges, under Roles
4. Select iCare under Role(s)
5. Select Home under Service Module
6. Select Home Widgets under Service Area
7. Click Home, iCare User Dashboard, and Inbox checkboxes under the View column
8. Click Residents and Documents to Sign/Review checkboxes under iCare section
9. Click Submit

**iCare User Set Up**

*In Vision, the Physician first must be set up as an entity, followed by the configuration of the Physicians actual username they will use to log in.*

**Adding/Update Physicians**

The *Add/Update Physicians* screen allows a user to add or update a physician within the system. Ensure to run the Physician Listing before implementing iCare to ensure the database only has ONE physician.
entity. When the physicians & Nurse Practitioners are setup as users, they can only be assigned to one entity. Validate that the system database has one entity for physicians to associate them as the PCP.

Entities must ensure NPI, E-Mail Address, and Title are entered on this page. Validate Physician address, phone number, and licenses are accurate.

**Setting-Up User Security**

When *Setting-Up User Security*, ensure the user has been added to *Active Directory* first. The user must follow the same requirements for the *Active Directory* as for regular Vision users, while adding the 3-digit customer code to the username specifically.

Note when updating user privileges the PIN is used to eSign the documents being pushed to iCare. You can leave this blank as the Care Provider will be prompted upon initial login to set his/her PIN, but if the physician forgets his/her PIN, the user can delete the PIN so the user will then be prompted to set it again. The PIN requirements are still maintained through *Organization Global Settings*. To access this Click *Organizational Global Settings*, under *Org. Structure*, within the *General* group of the *Setup* module. Also note that Nurse Practitioners should be setup as Physicians in order to sign & enter orders, not Physician Staff.

1. Click **Setup**
2. Click **Security**
3. Click **Add a User** or **Update User Privileges** under **User**. Select **Add** if this Physician is not set up as a user.

   a. User’s Organizational access = if Care Provider will be attending in multiple facilities, ensure Org Access is set to both
   b. Care Setting = functions just as it does for regular Vision users
   c. Associated Roles = assign the role the users Care Providers can have access to, with both the iOS application and Vision. Select the iCare role that has been created within your database
d. Is the user a Vision, Touchscreen, or Mobile View User? Click Yes to have access to see the Care Provider name as Personnel

e. Is the user an iCare User? Click Yes to have access to set an effective date (this allows the Care Provider to start utilizing his/her iOS devices)

f. Associated Physician/Staff allows user to attach the Care Provider to his/her entity which has already been added in Vision (note if duplicate entities are entered for physicians, address this before setting up the Care Provider as a user)

g. Terminology substitute is used to change the default name of the Care Recipient from “Resident” to “Patient” so the term Patient displays rather than Resident when logging into Vision and iCare

Build Physician Groups/Physician Staff/Physicians

To Build Physician Groups/Physician Staff/Physicians this can all be accessed under the Physicians, Physician Staff, and Physician Groups Setup section within the Setup module.

Note: For Administration and Nursing Management to have access to the patients and patient information, they can be set up like a staff for the Physicians associated to their location. Enabling iCare for these users will require utilization of iCare license per contract agreement.

Add/Update Physician Groups

The Add/Update Physician Groups screen allows a user to add or update a physician’s group. The primary focus of a Physician Group will allow Physicians to cover for one another if they are associated in the same group. For example, if you wish the Medical Director to see all patients within the facility, or if you have a Nurse Practitioner seeing every patient within the organization – this can be the one step to setup rather than individually.

1. Click Setup
2. Click Entities
3. Click Add/Update Physician Groups under Physicians, Physician Staff, and Physician Groups
a. Add a Physician Group – Search the database to ensure this Physician Group has not been added before. If no matches are found:
   i. Click Add New

   ![Image of Add/Update Physician Groups]

   ii. Click the Binoculars Icon to select an Organization
   iii. Enter Group ID. If no ID is entered one will automatically generate
   iv. Enter Display Name
   v. Enter NPI, if applicable
   vi. Enter E-Mail Address, if applicable
   vii. Add Addresses and Phone Numbers, if applicable
   viii. Click Save

Add/Update Physician Staff

The Add/Update Physician Staff screen allows users to add or update a physician’s staff members. The Physician Staff associates PA’s and Nurse Practitioners with the supervising physician.

1. Click Setup
2. Click Entities
3. Click Add/Update Physician Staff under Physicians, Physician Staff, and Physician Groups
   a. Click Add New
b. Click the **Binoculars Icon** to select an **Organization**

c. Enter **Staff ID**

d. Enter **Last** and **First Name**

e. Enter **NPI**, if applicable

f. Enter **E-Mail Address**, if applicable

g. Add Addresses and Phone Numbers, if applicable

h. Click **Save**

### Add Physician Staff Member to a Physician Group

To **Add a Physician Staff Member to a Physician Group**, follow the steps below for proper setup.

1. Click **Associate Staff and Groups** (link is available within **Add/Update Physicians** page)
2. Click **Add** (for either *Physician Groups* of *Physician Staff Members*)
3. Enter *Physician Group Name/Physician Staff Member Name*
4. Click **Search**
5. Click **Select**

### Add Associated Physician Group

- **Physician Group Name:** VHS
  - **Search**

  
  
  1 result found
  
<table>
<thead>
<tr>
<th>Group Name</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>VHS Physician's</td>
<td></td>
</tr>
</tbody>
</table>

### Device/Application Setup and Functionality Overview

The organization settings will allow the user to define the parameters that will be utilized with the iCare product. These settings include the Organization name, logo, contact and what I chart information the Physicians will have access to on a mobile device.

### Organization Settings

Follow the steps listed below to ensure proper set up for the iCare application. These settings must be enabled prior to the Physician using the system.

1. Click **Setup**
2. Click iCare
3. Click iCare Settings

![iCare Settings]

- **Organization Name** = auto-populates based on Care Provider logged in
- **Organization Logo** = organizational branding. To upload a new logo, Click Browse and search computer’s hard drive for desired image
- **Organization Website URL** = when logo is clicked, user is taken to organization’s website
- **iCare Services URL** = each customer is designated an iCare URL that will need to be noted when the Care Provider sets up his/her iOS device (this URL should be provided by the CSC/PM)
- **Get Assistance Contact Information** = Enter Name and Phone Number to obtain help information at the community. This person will be the Go-to person within the organization if/when Care Providers are having issues (ensure this person is aware of the flexibility needed when providing support to the Care Providers)
- **Roles to Receive Inbox Messages from iCare Users** = Select roles able to send/receive Physician messages. This will trigger alert provider to presence of documents in an email with no PHI
- **Send New Documents Notification Email Job** = establishes the time period in which Vision checks for new messages to send to the physician (minimum is 120 minutes). A physician will only receive one notification per group of documents for the indicated time period
- **Generate Physician Favorite Orders Job** = this field tells the system how often to generate new favorite orders (suggested time frame is 7 days)
- **Recent Admissions** = determines the number of days an admission is considered “recent” (default is 5 days). This will display as a capital green A by the residents name
- **Discharged Admissions** = determines the number of days that a discharge will remain active on the resident widget. There will be a lowercase “d” located next to the resident’s name to indicate they have been discharged.
- **Resident filtering and sorting** = Residents on the resident’s widget can be sorted by facility by selecting the specific facility under the settings tab
- **Physician Groups** = in order for Physician’s to sign orders for one another within a Physician Group, this radio button must be set to “yes”. This will allow all Physician’s associated within the same group to sign for each individual Physician.
m. Chart Content to Include = this section lets the user define which Vision content will be made available to the iCare User. Note that under current functionality if Care Providers are using paper chart, you normally allow them access to everything
   i. General/Resident Note Categories = this field determines how General Notes are being used within the user’s organization, to determine if the Care Providers should be given access. This field is generally used for Business Office (may not be applicable to the physician)
   ii. Clinical Note Categories = listed in this field are interdisciplinary or nursing notes that have been written in the resident’s record/chart within Vision
   iii. Assessment Types = this field allows the Care Provider to have access to view any interdisciplinary or nursing assessments that have been completed within Vision. If the therapy department will be using Vision, the Care providers will have access to view the Daily Documentation as well as their progress notes
   iv. Attachment Types = this field allows physicians to attach documents such as Labs, X-rays, etc.
iCare Enabled Forms

iCare enabled forms allow documents to be sent electronically for signature. A document tracker must be attached to the form in order to send them electronically.

Forms Builder

In Forms Builder there are documents with the Physician eSignature that must be enabled for iCare. These documents include (but not limited to): Physician Order Sheets, Interim Orders, Therapy Evaluations, Certifications, etc.
1. Click **Setup**
2. Click **General**
3. Click **Forms Builder** under **Forms**
4. Click **Copy**, for desired form if there is an existing form that needs modification for an electronic signature.
5. Click **Edit Template Info**
   a. Select **Document Tracker Type** (Can only be selected to forms)
   b. Click **Yes** for **E-Sign on Lock**
   c. Add **Physician Signature**
   d. Note: The **Signer Entity Field** will need to have a question added to the database to pull for the Electronic Signature Message. To do so, choose another column/row and add a question. Label the Question ID and Question Text close to the physician signature to find it after the fact. Choose the Answer Response Type as Physician Search and allow 1 Number of Answers.
e. Once the question has been added, validate that the Question Properties have the Document Tracker information selected:
   i. Document Tracker Recipient – yes
ii. Document Tracker Signature Required – no
   1. If this form is only for review only and does not require a signature, the Document Tracker Signature Required must be set to “no.”

f. Once you’ve updated, save the assessment and lock it. You will need to turn ‘off’ the old version of the form and enable the new updated version to allow this functionality to appear for the iCare users.

**Organizational Parameters**

When sending orders electronically to iCare the user needs to enable the correct POS to be signed. Note Vision already has a hard coded POS that can be sent electronically. If this isn’t the desired POS, the user will have to create a POS to send electronically and validate that all proper items are setup on the form.
to push information correctly. If *Forms Builder Security* is in place for the original forms, be sure to include new forms. To enable *iCare Clinical Settings* click *Clinical Settings*, under *Org Parameters*.

Enable iCare Clinical Settings by attaching the appropriate POS and Interim/Verbal Order Form.

**Clinical Office Processes**

The Admissions Department must attach the appropriate Primary Physician to the Residents Chart to ensure the Physician can electronically sign the resident’s orders.

**Physician Association**

When associating a physician to the resident admission as the primary physician, the physician resident list will populate as the Care Provider Caseload. Note when a physician is duplicated within Vision the Care Provider will not see all of his/her residents without merging the records together.

Note when associating a physician, the *Physician Address* and *Phone Number* are options because the database is searching for an entity rather than choosing a specific address. If an address or phone
number is listed on this screen and the physician entity has more than one address listed, the Face Sheet will only populated with the one address rather than what is on file within Vision.

To associate a physician the user can either click *Add* under *PCP* on the Resident Ribbon or go into the *Census* module.

1. Look up Resident
2. Click *Census*
3. Click *Resident Info*
4. Click *Add Physician* on *Physicians* Widget

   a. Click **question mark** button, to search for **physician**
      i. Enter necessary fields
      ii. Click **Apply Filters**
      iii. Select physician from provided list
   b. Enter 1 under *Display Order* (this is the primary physician)
   c. Enter *Physician Address* (optional)
   d. Enter *Physician Phone Number* (optional)
   e. Enter *Date Active*
   f. Click **Submit**
Generating Physician Order Sheets

The *Generate Physician Order Sheets* report is used to electronically send physician orders sheets to iCare. The report is also used to cancel existing documents in the documents tracker for the month/year. This report can also be a scheduled job. The files that are being sent are no larger than 250K. If the facility decides to use Job Scheduler to run this behind the scenes, there will be no interruptions to the current workload of users who are logged into Vision through the User Interface.

This report allows the user to filter by facility, resident, or Care Provider. This report can also be used to run the POS for a specific physician.

Note that this report functions as an assessment when printing the monthly orders for Care Providers to sign on a monthly basis. When an assessment has been signed, it will then appear under the *Assessments* group within the *Clinical* module. If an order is refused by a physician for signature this order/Physician Order Sheet will display in the *Alerts* group within the *Clinical* module. If the refusal reason is the order was added to the wrong physician, the order must then be copied forward and added to the correct physician for signature. To address this Click *Resend* and the order for signature will cancel.

1. Click *Clinical*
2. Click *Reports*
3. Click *Generate Physician Order Sheets* under *Orders*
   a. Generate For = Select iCare Users
b. Cancel & Recreate = Click Yes (this will cancel physician documents in the Document Tracker)
c. Click Submit

This report functions as an assessment when printing the monthly orders for Care Providers to sign on a monthly basis. When this assessment has been signed, it will then appear under the Assessments tab if the Care Provider has refused/accepted the POS.
If an order has been refused by the physician for signature, the Alerts tab will display that order/Physician Order Sheet. If for whatever reason the refusal reason is it was added to the wrong physician, the order must be copied forward and added to the correct physician for signature. The refusal can then be addressed by clicking resend and it will cancel the order for signature.

### iCare Mobile Application

The latest version of the HealthMEDX iCare Mobile Application can be downloaded through iTunes or the App Store. When searching for the application, enter “HealthMEDX iCare” to find the correct application. Note that the Care Provider can only use larger iOS devices to enter order; the iPhone will not allow this process.
Overview (for iPad, iPhone, iPod Touch)

Once the user is logged into the application, the system will display the iCare main page. To log into the HealthMEDX iCare app follow the instruction below for proper walk-through.

1. Click iCare icon, to launch the application

2. Enter Email Address
3. Click **Submit**
4. Enter **URL** (this is given to the user by the facility project manager)
5. Click **Back**
6. Enter **Username** and **Password**
7. Click **Login**

8. Create PIN
Documents to Sign

The *Documents to Sign* page compiles a list of documents ready to sign including, interim/verbal orders, physician order sheets, certification, and other forms designated by the community. A red number appears on the home screen when there are documents ready for signature. Note that within Vision, *Verbal/Interim* orders appear under the *Orders* group and *Monthly POS* appear under the *Assessments* group.

1. Click **Documents to Sign**

2. Click row of desired document to view the resident’s chart
3. Click icon at the bottom left of the page, to sign/reject the document
   a. Sign a Document
      i. Click Sign
      ii. Enter PIN
      iii. Click Confirm

   b. Cancel link = cancel the process of signing/refusing
   c. Refuse to sign a Document
      i. Click Refuse button
      ii. Enter reasons for refusal
iii. Click **Confirm Refusal**

If the user has selected the option to cover additional physician under setup, the additional physician documents to sign, to review, and inbox message will display on your screen.

**Documents to Review**

The **Documents to Review** page compiles a list of documents that have been identified by the facility to ensure the Care Provider has viewed the assessment that was created, but does not require a Signature. On this page once a Care Provider has selected **Archive**, the assessment/form that was originally displayed will disappear (as if the Care Provider has already viewed the information necessary).
Residents

The Residents page displays the caseload for the particular Care Provider, with the option to view individual residents. Click the Gear icon, to search and filter by facility. This is useful if the user is attending in more than one facility within the organization.
Note that some residents have more than one concurrent admission and during the order process it is essential that orders be applied to the correct admission.

The Residents summary page consists of displaying a smaller version of the Resident Ribbon in conjunction with quick links to Vitals, Documents, Resident Info, Diagnoses, Medications, Treatments, and Allergies & Attachments.
iCare

Vitals
The Vitals section will display the most recent vital signs of a resident along with any notes entered by nursing while documenting the vitals. Click the greater than (>) icon to obtain more information about a vital (if applicable).
### iPhone view:

#### Vitals

##### Most Recent Vitals

<table>
<thead>
<tr>
<th>Blood Pressure</th>
<th>Date/Time</th>
<th>Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td>145 / 83</td>
<td>1/8/14, 9:41 PM</td>
<td>Anderson, RN Hannah</td>
</tr>
<tr>
<td>155 / 85</td>
<td>1/3/14, 10:05 PM</td>
<td>NURSE, NANCY</td>
</tr>
<tr>
<td>150 / 80</td>
<td>12/31/13, 9:36 PM</td>
<td>NURSE, NANCY</td>
</tr>
<tr>
<td>160 / 80</td>
<td>12/2/13, 9:28 AM</td>
<td>Anderson, RN Hannah</td>
</tr>
</tbody>
</table>
Documents
The Documents section gives the Care Provider access to view any documents that have been completed within Vision (depending on the security granted to the Care Provider within the system). The user can filter documents to review based on three buttons towards the top of the screen:

- To Be Signed = items that need the Care Provider Signature
- To Be Reviewed = assessments that need to be reviewed rather than signed by the Care Providers
- Signed/Reviewed = Documents that have been already signed and/or reviewed

Therapy
The Therapy section gives the Care Provider access to view the therapy progress notes, daily documentation, and other therapy related items (depending on the security granted to the Care Provider within the system).

iPad view:
Resident Info

The Resident Info section displays the pertinent demographic information for the Care Provider’s needs. This information includes Date of Birth, Gender, Current Address, Case Manager, Advanced Directives, Admission information, Related/Responsible Parties.

iPad view:

![iPad view of Resident Info section]

iPhone view:

![iPhone view of Resident Info section]
Diagnoses
Under current functionality, the Diagnoses section allows Care Providers to view diagnosis codes. Note that Care Providers do not currently have the functionality to add DX to the resident chart. However, they do have the ability of seeing the current Active Diagnosis codes as well as History, if a diagnosis code has been resolved or reached an exacerbation date. If a primary diagnosis has been selected it will display above a dark green line indicating it is the primary diagnosis.

iPad view:

![iPad view of Diagnoses section]

iPhone view:
Orders

The Orders section will display the current active orders based off of the type of order currently being displayed. Each Order option has the ability of filtering order based on the Active, PRN, and Discontinued Order buttons. A current allergy list can also be seen on this screen. Note that a user can enter orders only on the iPad version of the software.

iPad view:
iPhone view:

When entering Medications, users have the option of adding from order sets, favorite list (indicated by the star symbol), or from the FDB medication library. Note the provider’s favorites list can be managed by using green stars. If a star is grey the item is no longer a favorite. This system will automatically remember the user’s choices.

Any medication appearing on the Beers Lists, ISMP, or CMS list will be listed as a high-risk medication and this will be indicated by a red high-risk box. The user will have access to enter Treatments, Lab, Diagnostics, Therapy/Restorative, Advance Directives, Referrals, or Order sets, by clicking the appropriate buttons.
To view a resident’s medical record, click the View Chart button. To return to the order entry screen without loss of data, click the Back button. The user also has the ability of discontinuing medications that are currently in the active status on the resident record.

**Entering Orders**

To Enter Orders follow the steps below for proper walkthrough.

1. Click **Add Medication**
2. Search for Medication – if using the search all to find a medication, tapping the green star can make this medication a favorite

   a. Enter Medication
   b. Click **Favorites** or **All** to filter search results
3. Click desired Medication row
   a. Amount to Administer = Enter value or use the plus or minus sign buttons to increase/decrease the amount to administer. The user can also type in the box if they wish to add more information on dosing.
   b. Route = Click Select, to select a route for the type of order being added
c. Diagnosis = Click Select, to open the list of active diagnoses on the resident record. If the diagnosis isn’t listed, the user can enter instructions and the nurse will be responsible for entering the diagnosis into the medical record.
d. Treatment/Therapeutic Range = Notes can be entered via typing or by singing the built-in dictation on the 3rd generation iPad.

e. Dispense as Written = Defaults to off, the provider will need to toggle to make the order be dispense as written.
f. Frequency = Click the i (information) button to add a Frequency or type the button in the blank box
   i. A screen of standard frequencies will pop up
   ii. If adding a PRN, add the frequency internally and then click PRN to do 3SPRN
   iii. The continuous option means the PRN is an FYI order to nursing and will not flow to the admin entry area
g. Duration = Enter Duration (if applicable). Tap any of the duration buttons or use the + sign to select. If the duration is not on the quick button, click the plus or minus sign then select days, weeks or months by clicking the “select >” button.
h. Begin Date = Defaults to the current date. To change click the date already listed

![Date selection screenshot](image)

i. Informed Consent = Click Select, to select an Informed Consent option (if the organization requires this to be obtained for psychoactive medication or restraints)

![Informed Consent screenshot](image)

j. Click **Done**
Order Entry: Deleting Orders Not Yet Submitted

If an error occurs in ordering, orders can be removed prior to making the orders active. The most common reasons for deleting orders not yet submitted is because of entry error or interactions found. To delete, swipe finger across the desired order to delete and Click the Delete button that appears. If an order is deleted prior to being active for the resident that order will not appear in the resident’s medical record.

If an order has been made active it will need to be discontinued, rather than deleted. To discontinue a medication, swipe finger across desired order and Click the Discontinue button that appears. The user will then be prompted to select a Discontinue Reason from the provided list. The user should then enter their PIN to validate the desired orders that are being discontinued. To choose discontinue more than one order at the same time, Click Edit to select desired orders.
If the discontinue reason is not in the list, then the provider can click on other to bring up a text box field.

**Adding Orders from Order Sets**

At the end of all of the *Order Types*, the user has the ability to add from Orders that were created within the Vision system. During an entry the user can add multiple orders from any category. One the left side of the screen the orders that have already been added will display. Note the green checkmark icon indicates the item will be pulled forward from the order set. Choose each individual order to add to the POE from the order set.
If an order has a required field validation error, this error will display the field in a red highlight. To correct the error, fill in the appropriate field and Click Done. Once an order has been completed, it will then appear within the column of added orders during the user’s session.
Order Submission: Confirmation of Signature

Once an order has been completed, Click Save & Sign, to see the Confirm Signature page appear. To Confirm Signature Enter PIN and Click Confirm. Note that once the PIN number has been entered and saved, it does not have to be re-entered during the session. Once all orders have been added, confirmed, and signed by the user, they will appear under the Medications and Treatments sections. A green dot icon will appear next to the orders that have just been added indicating they are new orders. This process also pushes these same orders to the Clinical Smart board within Vision for the presence that a new order has been entered by a provider.
Interaction Checking

When finished with submitting an order, Clicking Done will prompt an Interactions Found screen to appear. This screen allows the user two option; one being to return to the order and edit the interactions found or Click Save & Sign.
Entering orders that require Co-signature

Nurse Practitioners, Physician Assistants, and Medical Students all require orders to be co-signed. A list of physicians that can co-sign orders will display for providers whose orders require being co-signed. The Quick list will display physicians that are assigned to the residents and the Search list will allow the user to search for any physician within the organization.
Allergies
The Allergies section allows a user to view resident’s allergies as well as any adverse reactions related to the allergy. This section will display for a resident’s current admission.

Attachments
The Attachments section allows the user to view attachments that have been scanned into Vision. If your facility is currently not scanning documents into Vision, the physicians will not be able to see that
documentation. Based off of security settings different attachment categories will start to list and appear under the resident ribbon. The camera icon allows for the user to take photos using the iOS device of items such as wounds, documents, etc. Note that these pictures cannot be directly attached within iCare, but can through the Vision application. Within an Attachment Category, swipe left or right to display the next attachment.
Forms

The *Forms* section allows users to view forms of the Clinical Chart that have been completed within the Vision application through iCare.
Notes

The Notes section allows users to view any clinical notes that were written within Vision by the Nursing staff, IDT staff, or any other user. To view a specific type of note, select a note category. The more Note Categories that have been written within the resident chart increases the number of options appearing in this section. Notes can be filtered if there are multiple Note Categories.
Care Provider Inbox Messaging

*Care Provider Inbox Messaging* gives users the ability to write a message to a group of users or one specific user. To access this, Click the piece of paper with a pencil icon on the home screen. Note that the *Inbox Widget* is the only way Care Providers can refuse *Documents & Orders*, with the refusal appearing within the Vision application. This widget also allows for Vision users to send Inbox messages to the care providers regarding resident information. The groups that display here are driven through the iCare Settings previously setup.
Announcements

The Announcements page displays announcements that are generated through the Vision Announcements Widget.
Care Plan Oversight

The Care Plan Oversight page is used to document the length of time a provider was viewing a resident’s medical record as well as documenting any home health certifications and re-certifications. Note this page is used only for Home Health functionality.
Settings

The Settings page allows users to make adjustments to the settings in iCare. Some settings to note are the Mail Signature section, the Auto Logout section, and the ability to get a notification when New Document Emails come in. The Mail Signature is the wording that appears at the bottom of every email. The Auto Logout feature can be adjusted from three to fifteen minutes.
iCare Vision Side Functionality Review.

iCare also has the functionality to be accessed through the Physician Portal, or Vision on the computer. The Physician will be attached to the iCare role, which will allow access to Vision through the desktop.

Accessing iCare functionality through Vision

To access the iCare functionality through Vision, the facility will need a URL (that is different from the iCare URL) to access Vision. Once logged in, the user will be brought to the iCare View home page. Within the Residents area the user will have access to the Recently Selected Residents, and the iCare User Dashboard. Note that the iCare User Dashboard is not required for providers to have on their home page.
Residents Widget

To view resident information, Click the Residents Widget, on the home page. Note that a resident exists in this list for 30 days past discharge. Widget functions include:

- Filter = widget will default to Mine (based on Physician association). Click My Group to see the group of guests
- Sort = widget will default to Last Name. The guest list is in alpha order based on the sort selection
- Individual Guest Button = clicking an individual guest from the guest list will display the guest name, organization level, and facility location. Icons existing on the individual guest button include Census, Chart, and Calendar
- Page buttons = allows user to page through the list of guests
Documents to Sign/Review Widget

The Documents to Sign/Review Widget contains the Verbal/Phone Orders that need to be signed. Note that there are other items outside of orders that can be sent to iCare. Ensure that all facility documents that a Care Provider signs on paper have been converted to electronically completed. Note to refresh the listing of documents in the inbox Click Check for New Documents.

Click Documents to Sign/Review Widget:

1. **E-sign a Document**
   a. Click checkbox next to desired document to e-sign
   b. Enter PIN
c. Click Sign

2. **Review Documents (prior to e-sign)**
   a. Click Verbal Order from desired line (Verbal Order will populate)
   b. Enter PINK
   c. Click Sign (or not)

If a verbal order is refused, the Inbox Refuse Documentation message will populate. The physician will enter the related reason. Selecting the Refuse button, the message will be sent to the roles/personnel.

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**Inbox Widget**
The *Inbox Widget* allows clinicians to send a new message, reply to a message, forward a message, and delete a message. This widget contains messages from personnel, role, or other physicians and the number of inbox messages will display in the super bar. This widget displays *Message Priority, Type,* etc.
**Sender, Subject, Date & Time Received**, and related resident a message is related to if applicable). Note that messages are not a part of the Clinical Record.

- **Send a New Message**
  - Click **New**
  - Click **To**, to select the recipients of the message
    - Enter Recipients name
    - Select Type of Recipient
- Click **Search**
- Select Recipient
- Click **OK**

- Enter **Residents name**
- Select Type of Admission
- Click **Search**
- Select Resident
- Click **OK**

- Select Priority

- Click **Attach Resident** (if applicable)
  - Enter Residents name
  - Select Type of Admission
  - Click **Search**
  - Select Resident
  - Click **OK**

- Enter **Subject**
- Enter **Message**
- Click **Send**
- Reply to a Message
Click the checkbox of desired message to reply

Click **Reply**

Enter Message

Click **Send**

- **Forward a Message**
  - Click the checkbox of desired message to forward
  - Click **Forward**
  - Click **To**, to select the recipients of the message
    - Enter Recipients name
    - Select Type of Recipient
• Click Search
• Select Recipient
• Click OK
  o Enter Message
  o Click Send

• Delete a Message
  o Click the checkbox of desired message to delete
  o Click Delete

iCare User Dashboard

The iCare User Dashboard allows for members of a physician group, including physician staff, to interact with the messages and documents of other members in the group.
The following information will display:

<table>
<thead>
<tr>
<th>Column</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>Displays the associated physician or practitioner.</td>
</tr>
<tr>
<td></td>
<td>Allows an Inbox message to be sent to the User.</td>
</tr>
<tr>
<td>Last Login</td>
<td>Date/Time the user last logged into Vision.</td>
</tr>
<tr>
<td>Last Login (iCare)</td>
<td>Date/time the user last logged into iCare.</td>
</tr>
<tr>
<td>Unread Messages</td>
<td>Count of Inbox Message the user has not read.</td>
</tr>
<tr>
<td>Critical</td>
<td>Count of documents that are at the critical time period.</td>
</tr>
<tr>
<td>Warning</td>
<td>Count of documents that are half the time to the set critical time period.</td>
</tr>
<tr>
<td>Normal</td>
<td>Count of documents that are in the normal status.</td>
</tr>
<tr>
<td>+</td>
<td>Expands to the individual documents that make up the count.</td>
</tr>
</tbody>
</table>

Selecting the individual document will populate the Document Tracker grid with the documents populated:

**iCare Clinical Management within Vision**

The portal in Vision allows users to diligently manage any document that was successfully sent to the Provider through via iCare. Users can track each one of these documents through various widgets.
Document Management

*Document Management* is the area that defines the process for Verbal Orders, from the point of creation to managing the signed or rejected Verbal Orders.

Signed orders will be reflected in the Physician order entry page.

![Document Management Table]

**Document Refusal**

Once orders are refused from the Physician, there are a few different notifications that appear in Vision indicating an order has been refused.

The To-Do’s widget will display the Order that was refused in red.

![Document Refusal Table]

In the Resident’s Clinical Chart, under the alerts tab, the refused order will be displayed alongside a “resend” function that will push the order back to iCare.
In the Resident’s Chart in the assessments section, the order sheet that was refused by the Physician will display

By clicking on the signed or refused section, a summarization of the electronic signatures will appear

Create a Verbal Order
Once Verbal Orders are created within Vision they are accessible from the Document Sign area of iCare. Note that the CC will create Verbal orders within Vision, at 4:00 am daily. Once created in Vision, the Verbal Order is accessible from the Document Sign area of iCare or Vision.

1. Click Clinical
2. Click Reports
3. Click Orders
4. Click the Binoculars icon to select an Organization
5. Enter Begin and End Date
6. Click the **Binoculars** icon to select a Guest, Physician, and/or Author (optional). If no selections are set, the report will run for all Verbal Orders, based on Organizational Selection and Date filters.

7. Click **Submit**

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**Document Tracker Widget**

The **Document Tracker Widget** is a home widget that monitors the status of each document sent to the Physician for an e-signature. Be sure this widget is enabled within security. To confirm this, click the **Menu Access Privileges** link, under the Roles section, of the Security area, under the Setup module.
“Organizational Parameters: Establish critical warning days via Org Parameters > Clinical Settings. We recommend 7 days.”

1. Click the **Configuration** icon
2. Click the **Binoculars** icon to select an **Organization**
3. Enter **Date Range**
4. Select **Show** from dropdown list (**Created** is selected by default)
5. Click **Document Types to Show**
6. Click **OK**
To adjust the widget date and document status, select the date range filters, document status or the configuration icon. The following configuration screen will populate:

The facility or lower organization must be selected. Adjust the date range as needed. Show document status, document status comparison values. The Created (Not Received or Refused) is selected by default. Select the Document Types to Show for Interim Orders. Select Ok. Note: The configuration settings will be retained per user.
By selecting the document bar, the Document Tracker Grid populates:

The document tracker will also display a list of the refused Forms, Interim Order Sheets, and Physician Order Sheets depending on the date parameters that are set.
In order to cancel a refused POS, user has to select the specific POS by checking the box, and then click cancelled at the top:

Click the Document bar to access the Document Tracker Grid.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
</table>
| Status     | • Document timeframes, assigned in Organizational Parameters Clinical  
            • Blue = Normal  
            • Yellow = half the time of Critical  
            • Red = Critical number of days to return |
| Recipient  | • Physician associated to the Verbal Order |
| Type       | • Displays the type of the order |
| ID         | • Displays the identifier associated to the document  
            • Selecting the blue hyperlink will populate the document |
| Current Status | • Displays Sent or if a document is Locked  
                • Sent is based on the iCare parameter |
| Created    | • Date the document was created |
| Lock       | • Date the document was locked |
| Sent       | • Date the documents was sent to the physician  
            • For iCare/Portal, the created date and sent date will be the same |
| Re-sent    | • Date if a document was resent to a Physician |
| Received   | • Date when the document has been returned signed |
| Refused    | • Date the document was refused |
Nursing Completion of Orders within Vision

A nurse is notified on the *Clinical Smart board or Order Administration Widget* within Vision, when orders have been entered through iCare. In the *New Orders* column there are two different colored dots that will appear depending on the user’s facility. A yellow dot appears by the facility when using draft status. A red dot appears when a care provider has entered the order through the iCare POE. The red dot indicates the order needs to be attended to immediately. When clicking the red dot the Vision POE screen displays, for the user to address the order(s) that have been entered or discontinued by the physician as well as complete the necessary items.

On the Vision POE screen, to make orders available for the staff for administration, the required fields need to be completed before clicking *Save*. The nursing staff needs to understand the ability of changing status from *Draft to Active*, completing required fields, adding nursing notes (if applicable), and validating if the order requires a physical monitor to be added. If using the Order Sets setup by the organization, pull the physical monitors, notes, etc. that are within the order set already.

Note that the widgets are set to refresh every three minutes, but the user can manually refresh by clicking the refresh icon.
When the user clicks on the Red Dot, it takes them to the Vision POE screen for them to address the order(s) that have been entered or Discontinued by physician and complete the necessary items. The first order displayed shows that the provider discontinued the order through iCare POE, and it needs to have recognition from the staff that indeed the order is discontinued.

To make the orders available to the staff for administration, the required fields that are identified within the organization are required for completion before submitting save. Ensure with the nursing staff they understand the ability of changing the status from Draft to Active and completing the required fields, adding any nursing note and validate if the order requires a physical monitor it has been added.

If the Care Providers will be using the Order Sets setup by the organization, the will pull the physical monitors, notes, etc. that are within the order set already.
Overview

This document is intended to assist personnel in troubleshooting support incidents for iCare, both iOS and web-based. Included within are directions for how to troubleshoot incidents on both versions as well as a Frequently Asked Questions (FAQs) for commonly reported issues.

Troubleshooting

To troubleshoot iCare issues within the web-based product, follow the same instructions as troubleshooting Vision.

Setting up an iCare User

To troubleshoot iCare issues within the iOS-based product, setup the master user to be an iCare user that is a Physician Staff member associated to the Physician reporting the issue. This will allow you to login using the master account and your credentials on an iOS device. You will then be able to view the same patient’s/charts the physician views. Unfortunately, at this time, troubleshooting Documents to Sign and Review cannot be performed in this manner.

In addition, as a standard practice, when troubleshooting issues on the iOS-based product, please verify the user has the latest version of iCare installed. This can be by tapping on iCare >

Or on the iPad going to Settings > iCare App

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Vision Application Training Manual
FAQ’s

When attempting to add the URL to connect to on iOS, the “+” icon never appears. Ensure the URL entered is valid. Kill the app, restart it, and try again. If this fails, check the URL in a web browser. Enter the URL as you have typed it (e.g. https://app1.healthmedx.com/icare) plus “/connectiontest.xml” (i.e. https://app1.healthmedx.com/icare/connectiontest.xml) You should get an xml response and should not be prompted for credentials. If you do not get a valid response there is a problem with the web server setup. If the address is not secure (i.e. https) address, check the iCare settings on the iOS device’s Setting pane to see if the device is configured to allow non-secure addresses. By default, https is required.

When logging into iCare you get a message indicating invalid user id or password. Ensure a valid user id and password are being entered.

When logging into iCare you get a message indicating you are not a valid portal user. Check in Vision on Update User Privileges to see if the user id is setup as an iCare user and that a valid Physician or Physician Staff is selected.
When logging into iCare on an iOS device you receive an unknown error occurred message, or iCare simply closes without an error message  Tap on Settings, and then iCare. Turn the Reset option “On”. Then kill the app and restart it. If that does not resolve the issue, check to ensure the app server is operational by navigating to the app server + “/iCare/ClientWCF/PortalLoginService.svc” (e.g. https://app1.healthmedx.com/icare/ClientWCF/PortalLoginService.svc) - this should load without error and should not prompt for credentials.

Email registration does not automatically pull the appropriate login URLs Email registration is not yet operational

No patients are available under Patients on iOS (or on the Patients widget in Vision). Check in Vision on Update User Privileges if the user id has at least one Care Setting selected – User Care Settings are required for this to function properly

![User's Organizational Access](image)

**Figure 1**

Patient is not displaying in the Patient list  Ensure the physician is associated to the patient in Vision as the PCP. Ensure the admission has not been discharged past the minimum time frame specified in the iCare Settings page

Certain content is missing on the iOS version of iCare  For Notes, Assessments/Forms and Attachments, check the iCare Settings page in Vision to ensure the types of content missing is set to be displayed in iCare.
Assessments/Forms do not display properly (or an error message is displayed rather than the form) on the iOS versions of iCare Ensure the user is logging in to the correct app server URL. Logging into a test app server using a production login, or vice versa, will result in forms (and possibly other views) not functioning properly.

The physician told me that he has entered several orders on my patient, but the nurse cannot see them as draft orders in Vision, why? Ensure that the physician is associating the orders to the correct admission if the patient has more than one admission. Ensure that the physician is following the process of signing orders with his pin.

Why are physician orders discontinued directly in iCare with only an acknowledgement in Vision by nursing? This was a request from the Medical Advisory Board that all physicians orders be considered discontinued upon signing. Unsigned medications and treatments up to the point of discontinuing (time of discontinuing) will be available for signing.

Adverse Reactions are not displaying in iCare Ensure the patient has adverse reactions entered in Vision.

I am a Medical Student, why are all my orders requiring co-signature? This was a request from the Medical Advisory Board that all Medical Student orders be required to be signed off by physicians.

Document to Sign or Review is not available/displaying under Documents to Sign or Review Using Document Tracker in Vision, check the document in question is set to a “Sent” status. If document has a “Sent” status, ensure the recipient of the document is the physician expecting to see the document. Remember that Verbal/Interim orders will appear under the Orders tab versus Monthly POS appearing under assessments.

Physician is not receiving email notifications about Documents to Sign Check the iCare Settings page in Vision to ensure the job is setup and running successfully. Check in Vision that the Physician has a valid email address specified and that “Notify on New Documents” is turned on.
Physician does not want to be receiving email notifications about Documents to Sign. Turn off the New Document Email Notifications in Settings. Or removing email from physician entity in Vision.