Connecting Disconnected Data™

Product Features Overview

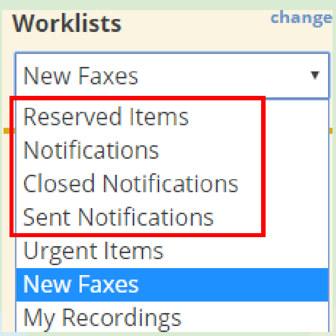
Release 8.0

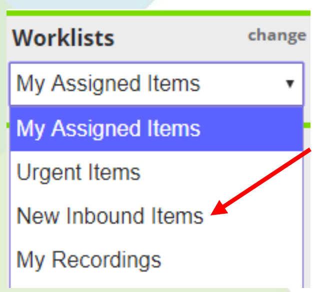
- *Tracker*
- *PixCert*
- *TVOD*
- *Trace Quality Assurance*

Tracker

Notifications* and *Reservations* are now *Assignments
New Faxes worklist is New Inbound Items

All notification-related worklists and the *Reserved Items* worklist are replaced with the *My Assigned Items* worklist. New Faxes worklist is replaced with New Inbound Items.





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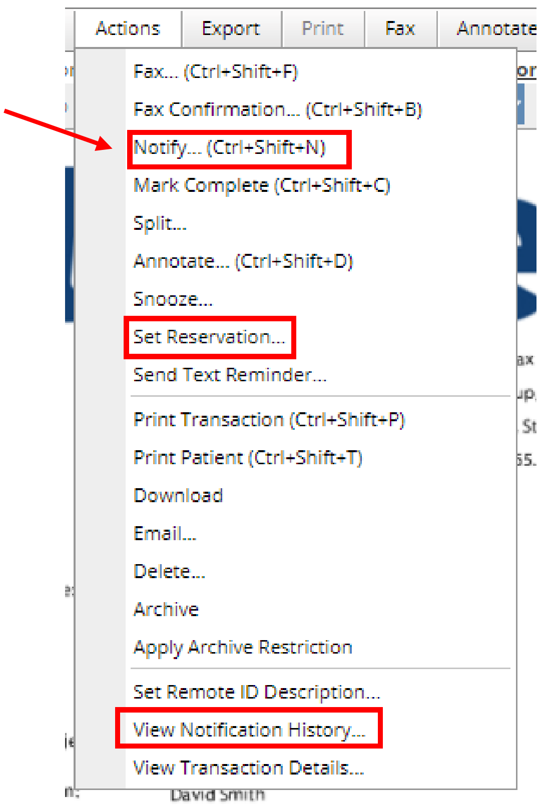
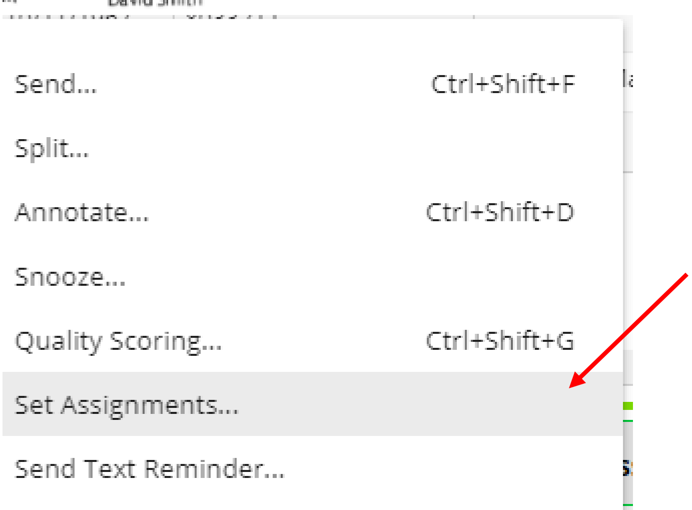
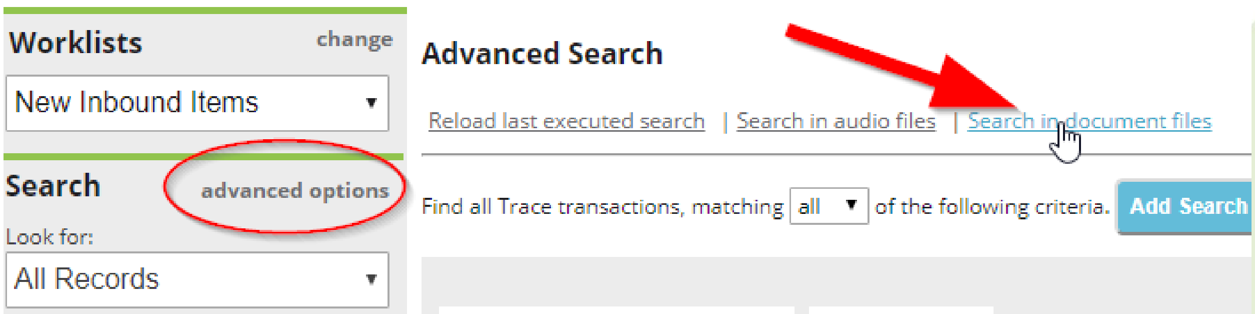
All notification- and reservation-related options in the *Actions* menu are removed or replaced with the *Set Assignments…* option. The Fax option in the Actions menu is replaced with Send.



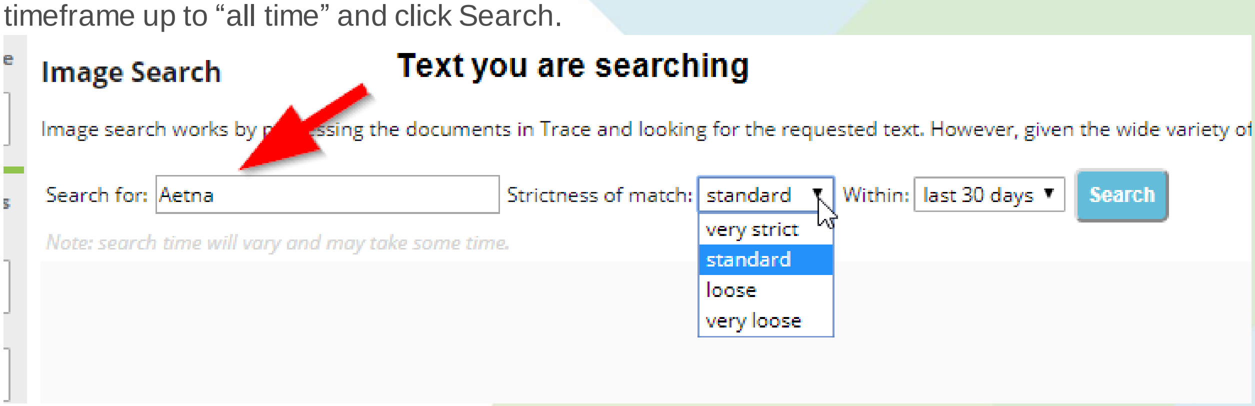


OCR And Audio Search now available under Advanced Search

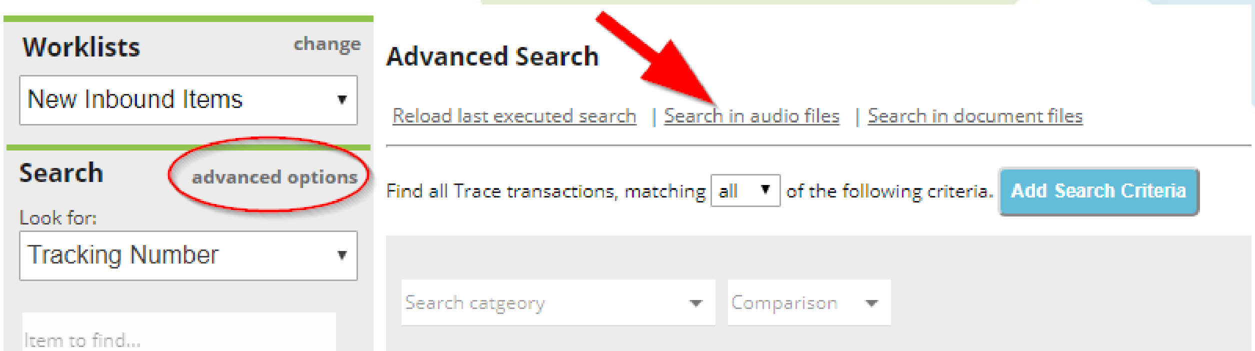
You can now do an OCR search of all machine written text in all document types like PixCert, Faxes, and Imported\Interfaced documents. Note: OCR is enabled by default in the 8.0 Release.



You can select the text and level of strictness although Standard is recommended. Select the timeframe up to "all time" and click Search.

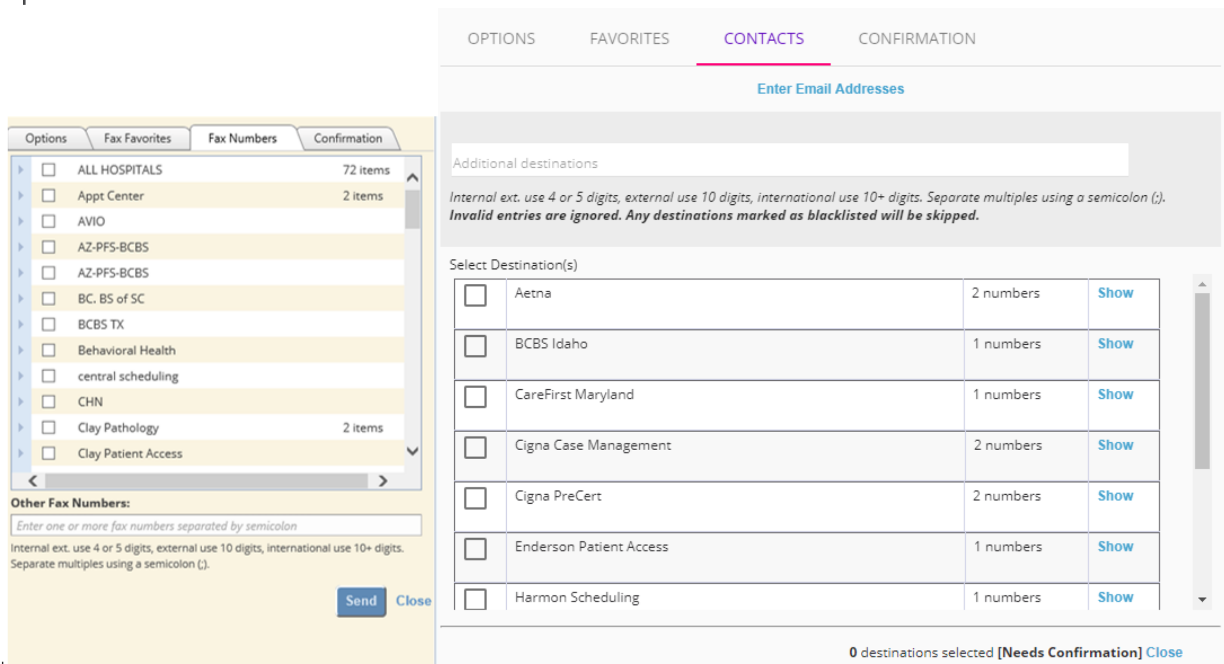


Similarly, you can now more easily get to Audio search direction to search for any words or phrases that exist or do not exist within an audio recording of any type. **NOTE**: You must have Audio Search Enabled.



Coversheet Layout

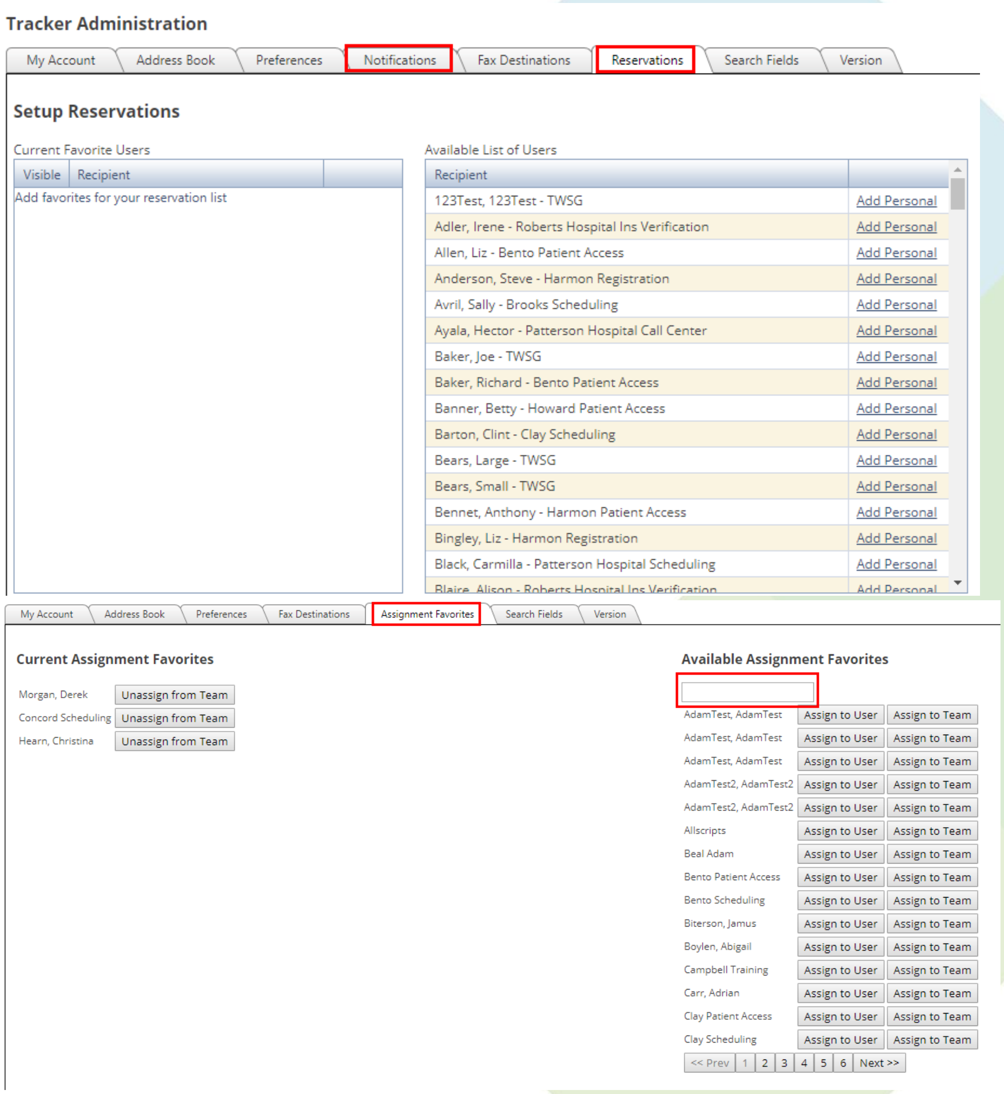
Coversheet layout has changed in 8.0. Attach items from options section. The contacts section replaces Fax Numbers tab.



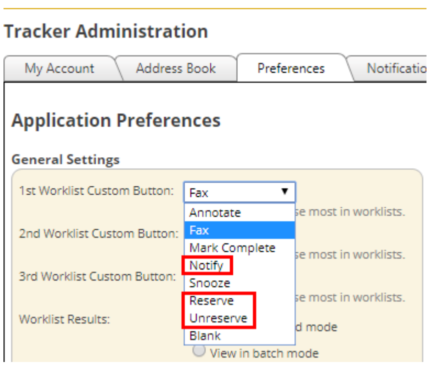
Enter email addresses, fax numbers and destination codes under “Contacts”.

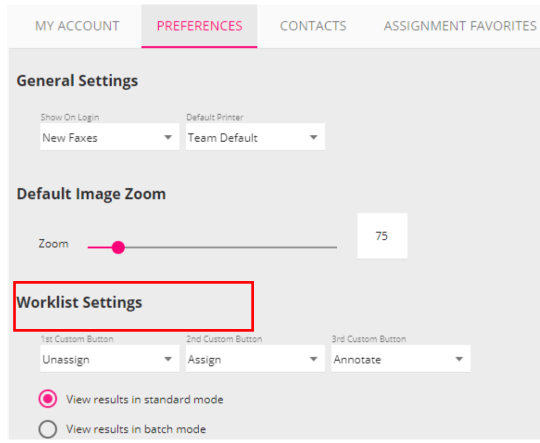
Setup Menu

The *Setup* menu no longer has a *Notifications* tab, and the *Assignment Favorites* tab replaces the *Reservations* tab. The *Assignment Favorites* tab also has a text filter to search for groups or users by name to add as a favorite.

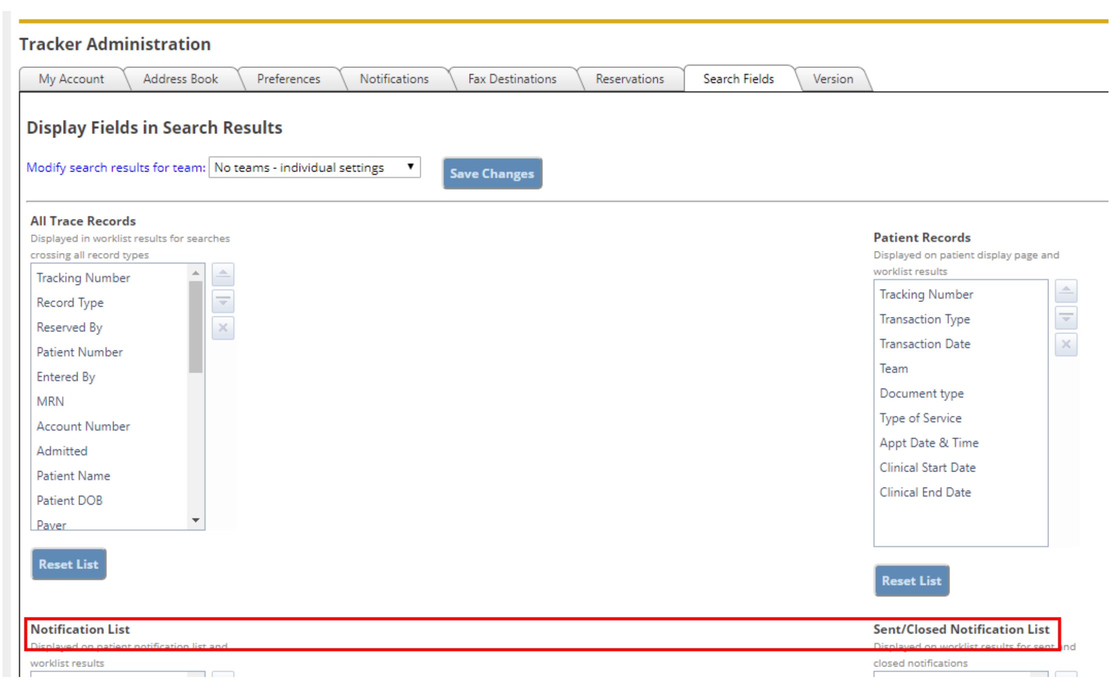


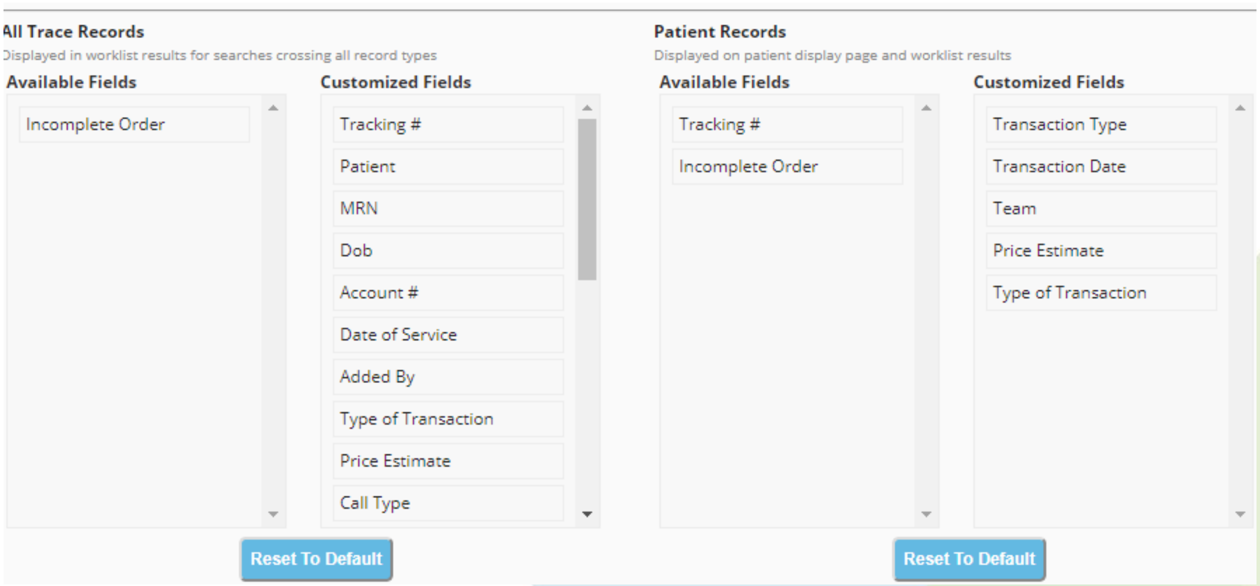
The *Preferences* tab under the *Setup* menu removes the *Notify* custom button option and replaces the *Reserve* and *Unreserve* options with *Assign* and *Unassign*.





The *Search Fields* tab under the Setup menu removes the *Notification List* and *Sent/Closed Notification List* sections from the customization options. The layout has changed to add a "Customized Fields" section.





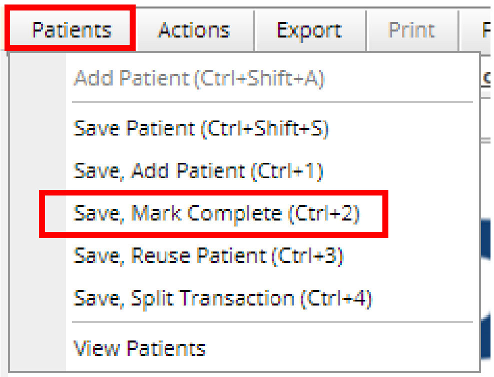
The worklist grid column previously labeled "*Reserved By"* is now labeled "*Assigned To"*. Since assignments can be associated with both groups and users, reservations to multiple users will appear in the grid as Users, and reservations to multiple groups will appear in the grid as Groups.

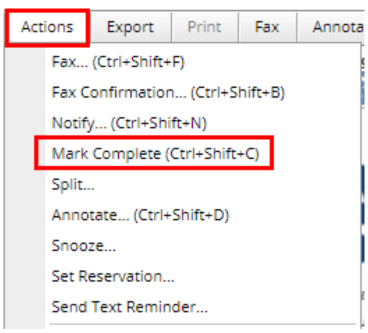
Tracking Num	Record Type	Reserved By
90163	Fax	
90154	Fax	
90146	Fax	
90144	Fax	
90088	Fax	
90048	Fax	
90044	Fax	
90007	Fax	
89999	Fax	
89968	Fax	

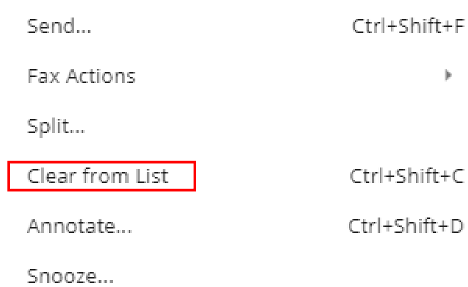
Track #	Patient	MRN	Account #	Dob	Assigned To	Added By
3522					Group(s)/User(s)	
3415					Group(s)/User(s)	
3411	Bacon, Heather	700010332	7099111	08/10/1970		
3405						
3403						

Mark Complete **is now** ***Clear from List***

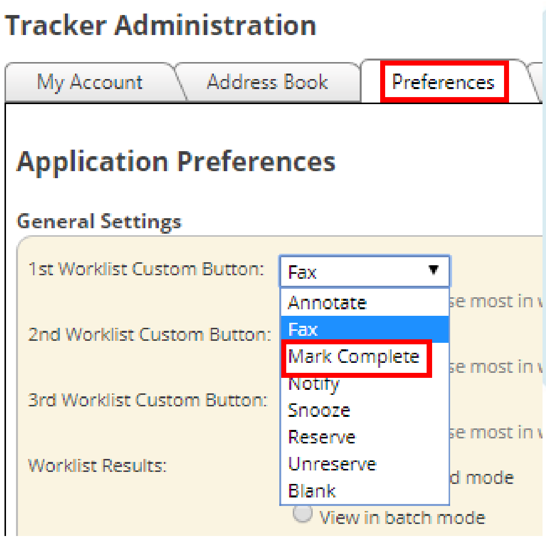
The terminology around removing an item from the New Inbound Items worklist has been changed from “Mark Complete” to “Clear from List” in both the Patients and Actions menus.

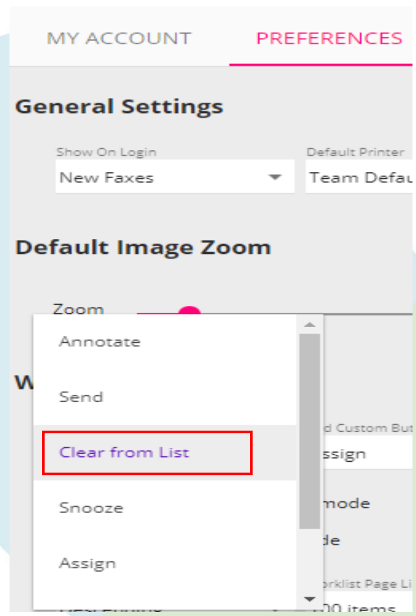




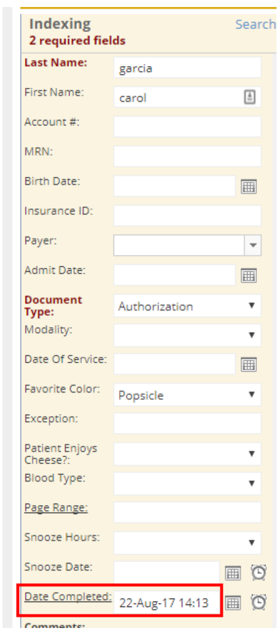


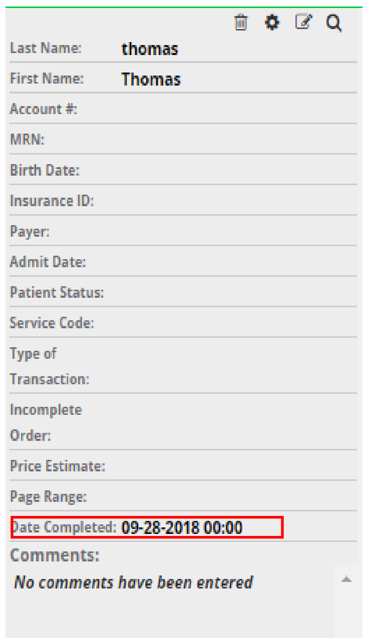
Mark Complete now appears as *Clear from List* in the custom worklist button options under *Setup > Preferences.*

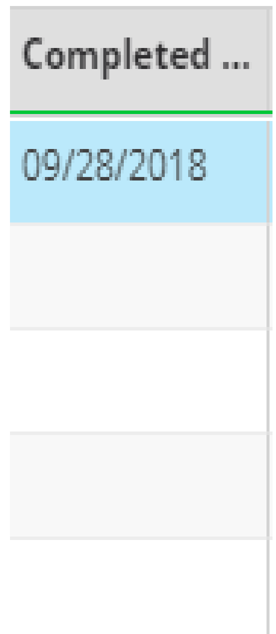




NOTE: Clients/Customers wishing to track statistics on completion of inbound faxes should be encouraged to use the "*Date Completed"* indexing field as part of adding patients to records. In Release 8.0 we added a "*Completed On"* column that will show the date/time stamp from the Date Completed field in the grid when it is used, regardless of whether the fax has been cleared from the New Inbound Items worklist.

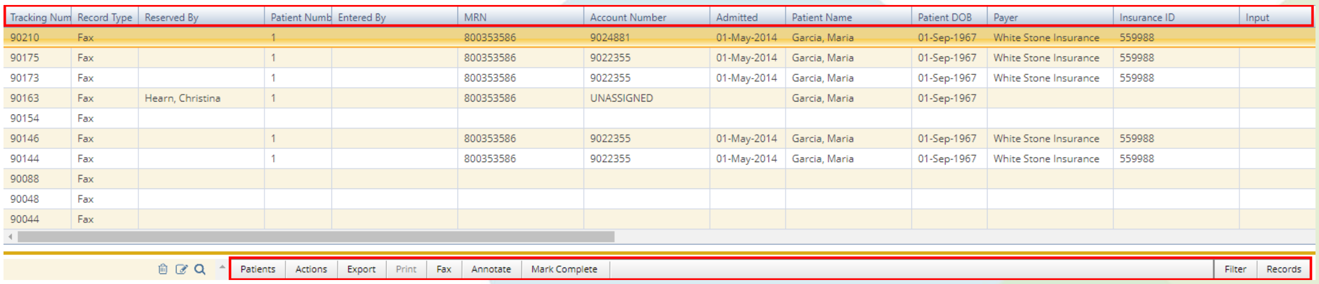




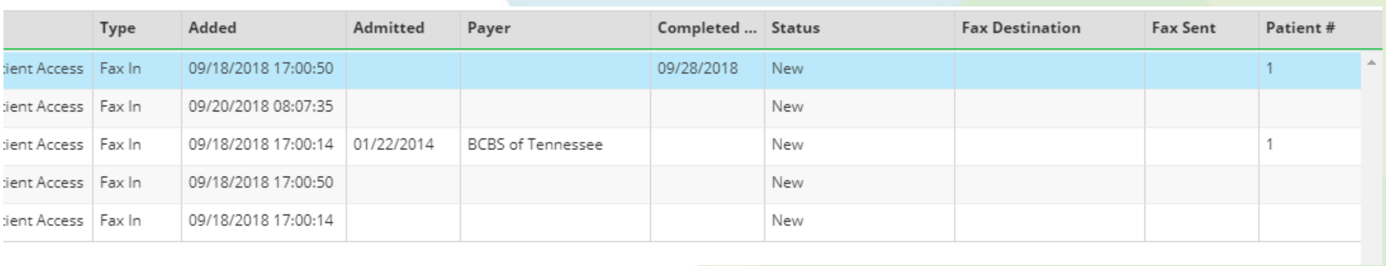


Style changes and grid column changes for worklists

Grid column headers and the horizontal divider between the worklists grid and the image/patient data display now appear in medium blue with white text. Release 8 column headers appear in black text with gray shading and the horizontal divider is gray with non-bolded black text.



Tracking Num	Record Type	Reserved By	Patient Numb	Entered By	MRN	Account Number	Admitted	Patient Name	Patient DOB	Payer	Insurance ID	Input
90210	Fax		1		800353586	9024881	01-May-2014	Garcia, Maria	01-Sep-1967	White Stone Insurance	559988	
90175	Fax		1		800353586	9022355	01-May-2014	Garcia, Maria	01-Sep-1967	White Stone Insurance	559988	
90173	Fax		1		800353586	9022355	01-May-2014	Garcia, Maria	01-Sep-1967	White Stone Insurance	559988	
90163	Fax	Hearn, Christina	1		800353586	UNASSIGNED		Garcia, Maria	01-Sep-1967			
90154	Fax											
90146	Fax		1		800353586	9022355	01-May-2014	Garcia, Maria	01-Sep-1967	White Stone Insurance	559988	
90144	Fax		1		800353586	9022355	01-May-2014	Garcia, Maria	01-Sep-1967	White Stone Insurance	559988	
90088	Fax											
90048	Fax											
90044	Fax											



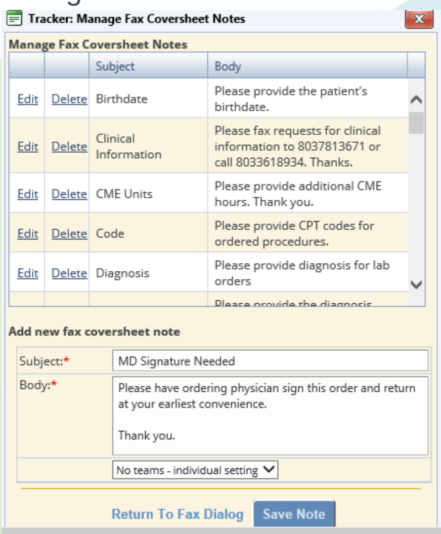
	Type	Added	Admitted	Payer	Completed ...	Status	Fax Destination	Fax Sent	Patient #
:ient Access	Fax In	09/18/2018 17:00:50			09/28/2018	New			1
:ient Access	Fax In	09/20/2018 08:07:35				New			
:ient Access	Fax In	09/18/2018 17:00:14	01/22/2014	BCBS of Tennessee		New			1
:ient Access	Fax In	09/18/2018 17:00:50				New			
:ient Access	Fax In	09/18/2018 17:00:14				New			

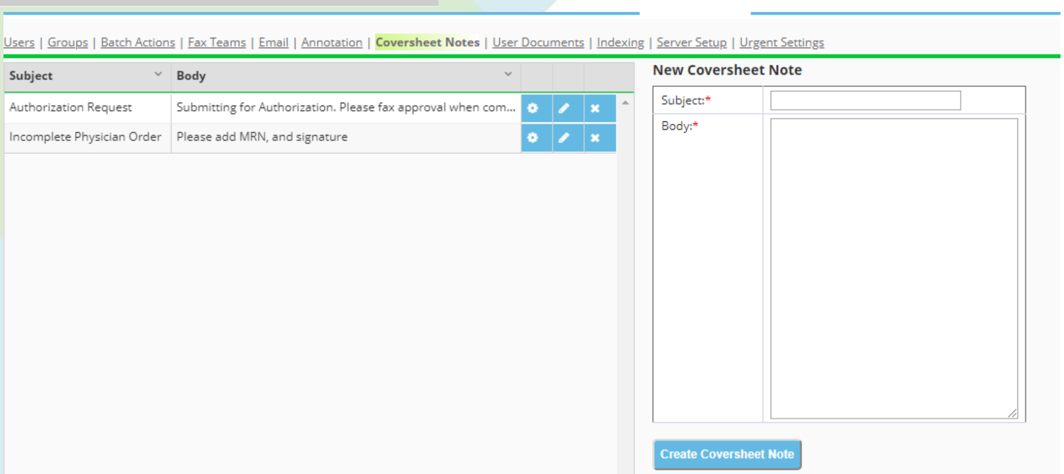
Some column headers have been consolidated or renamed, and the default order has been modified as below. As with prior releases, the column order can be modified in *Setup > Search Fields*. Tracker admins can apply the preferred grid order to teams in *Administration > Indexing*

Release 7	Release 8
Tracking Number	Tracking # (worklist column Track #)
Record Type	Type
Reserved By	Assigned To
Patient Number	Patient #
Entered By	Added By
MRN	MRN
Account Number	Account #
Admitted	Admitted
Patient Name	Patient
Patient DOB	Dob
Payer	Payer
Insurance ID	Insurance ID
Input	Added (merges date for all types except Fax-out
Date Received	Added
From	Fax Sender
Recipient	Trace Team
Fax Type	Type
Destination	Fax Destination
Date Sent	Fax Sent (Outbound Faxes)
Call Type	Type

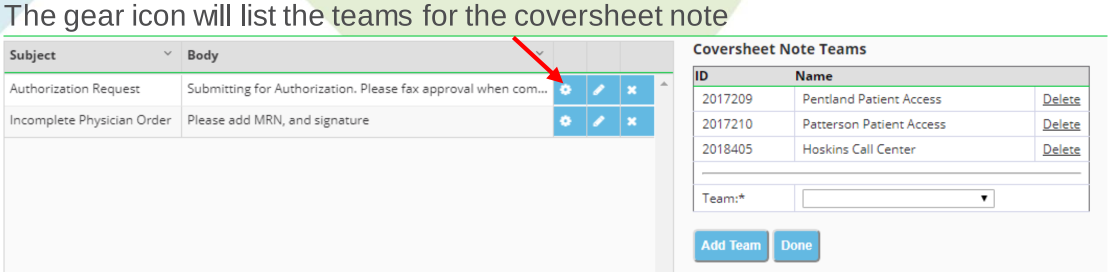
Coversheet notes administration moves to Administration tab

This feature was previously part of the Manage button in the Fax dialog. The initial view in *Administration > Coversheet Notes* displays a list of all admin level notes with action and a dialog to add a new note.





The gear icon will list the teams for the coversheet note



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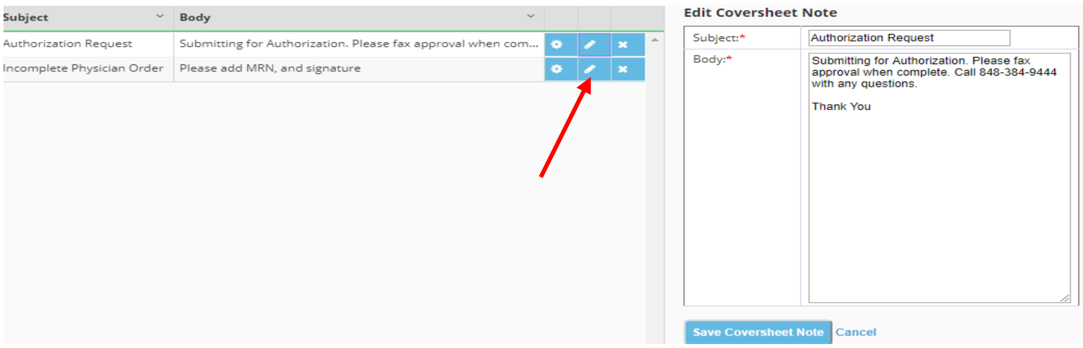
Clicking the *Edit* icon displays the note's subject and body and allows them to be changed

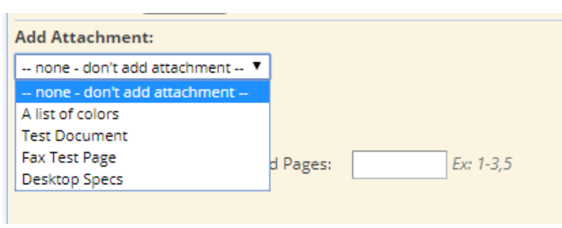


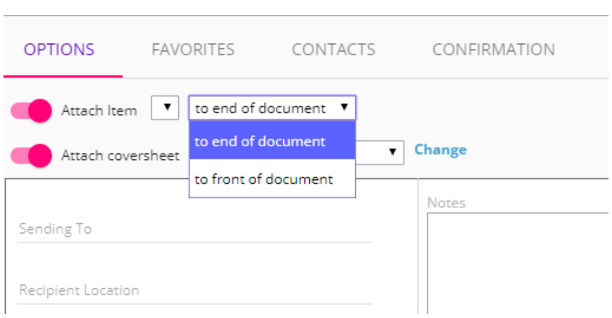
This change resolves an issue where new users on a team had to have existing notes copied to them individually – now, if the team has notes, all users on that team can access them from *their first login.*

All existing team-level coversheet notes will be moved to the new process as part of the update.

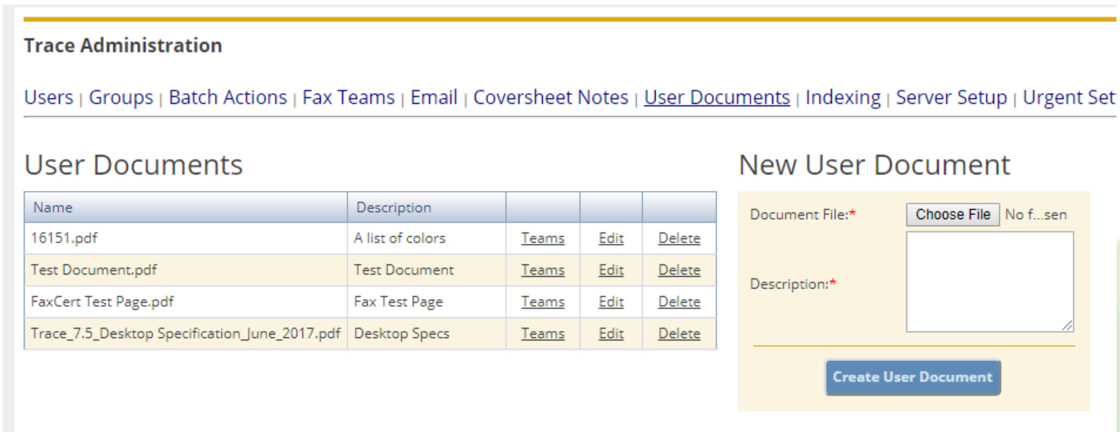
The Fax dialog now includes option to add attachments

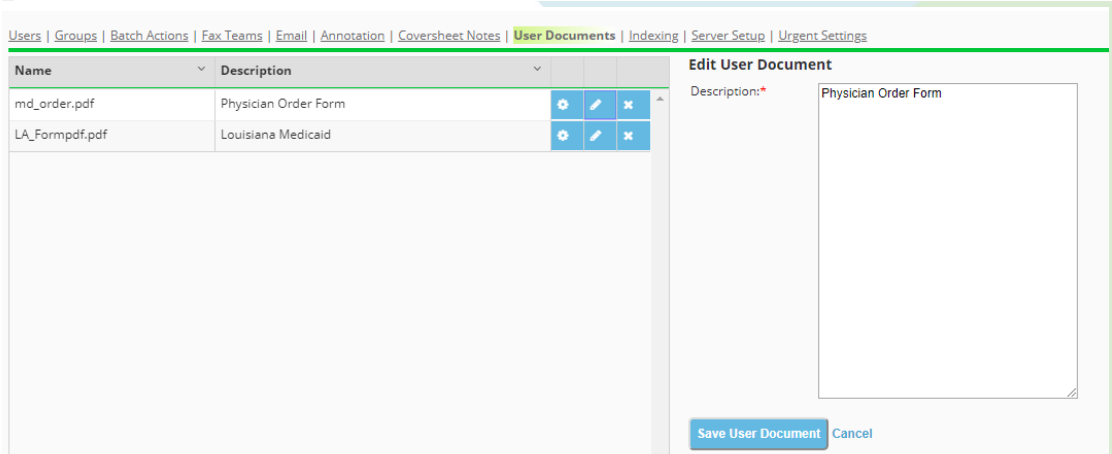
Users now have the ability to attach additional static documents to outgoing faxes(for example: a notification of a process/contact change for a department). In the Add Attachment section, the Fax dialog displays a dropdown list of available documents, then a dropdown with the option to attach the selected document to either to the front of document or to the end of the document. In release 8 the feature is located under the "Options" tab when sending out in Tracker.



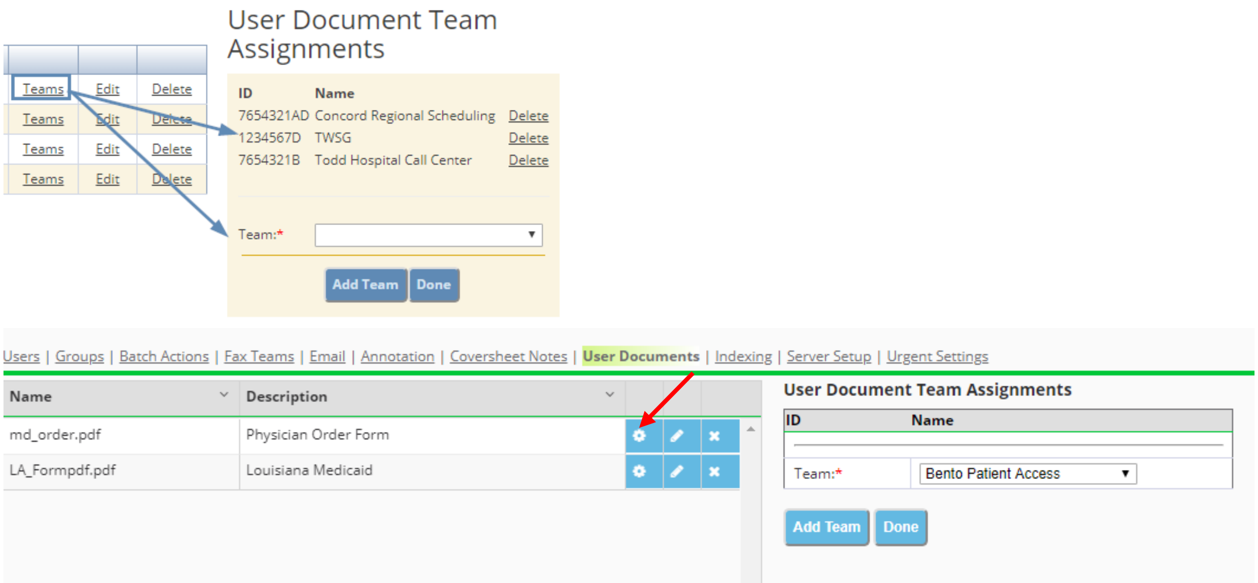


To add a document to the list for a team, a Tracker admin can click Administration > User Documents. This section can also be used to assign documents to additional teams. In release 8 the layout has changed for this feature.

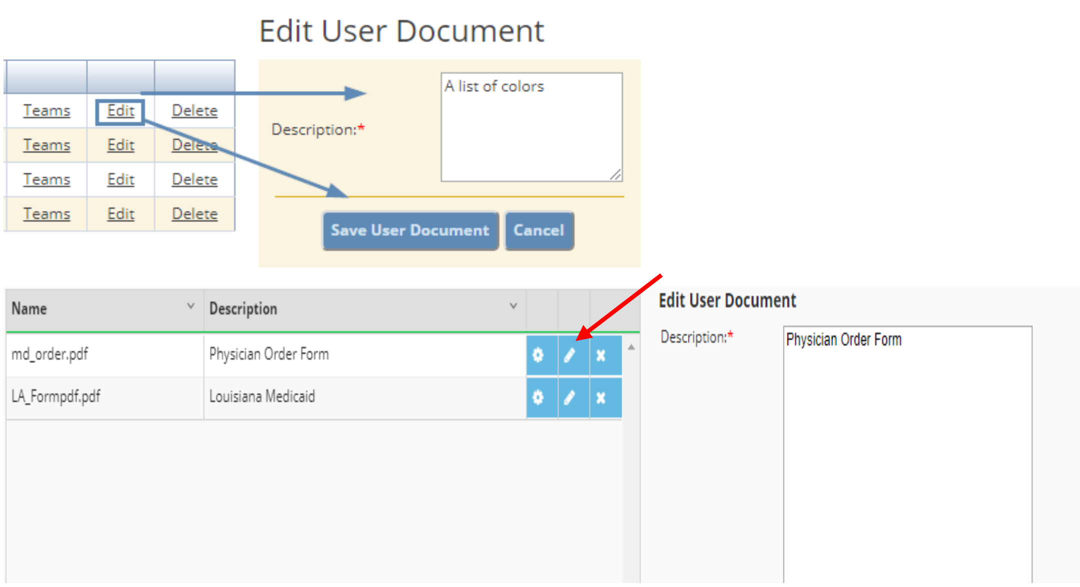




Clicking the Teams link displays a list of teams that have the document assigned and allows new teams to be added



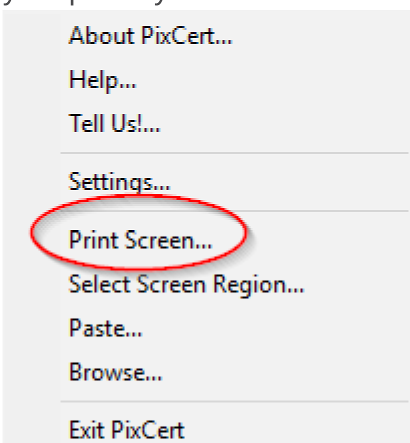
Clicking the Edit link displays the document description and allows it to be changed

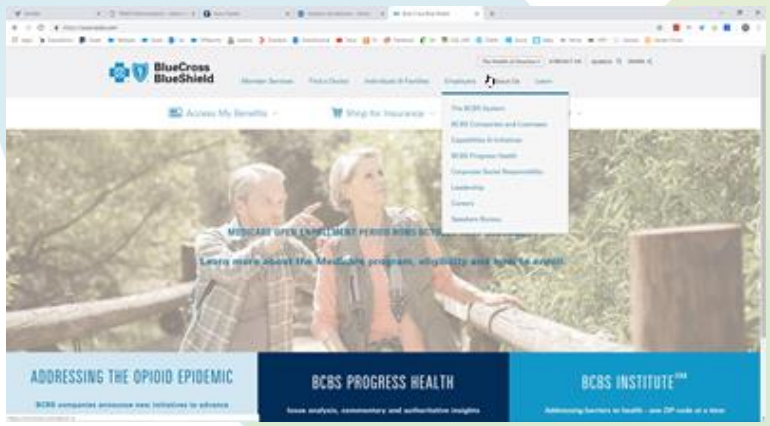


PixCert

The PixCert icon in the service tray now has some updated menu items (right click on the PixCert icon in the system tray for the new option.

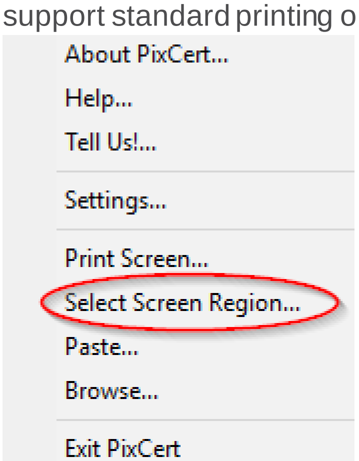
First you can now select Print Screen which depending on configuration will allow you to capture your primary screen or both screens (dual screen). Primary Screen capture is default.

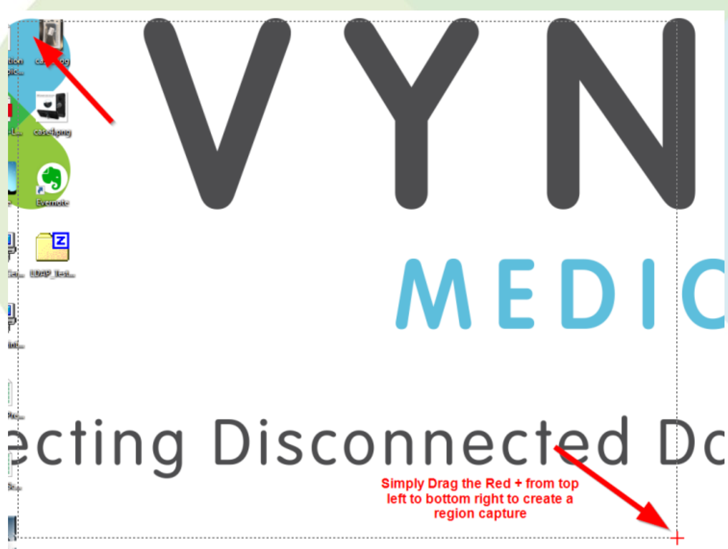




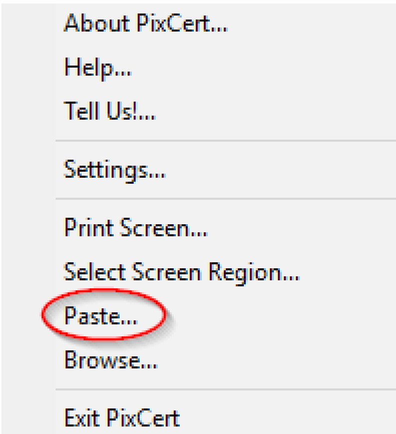
Example Print Screen

Next - Select Screen Region gives you the ability to draw a box around any portion of your screen and create an image capture of it. This is very helpful with applications that do not support standard printing options.

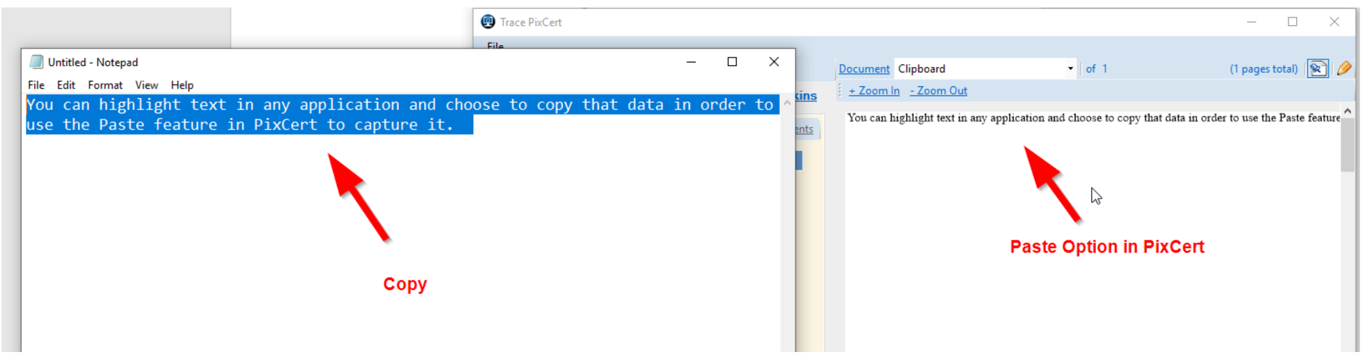




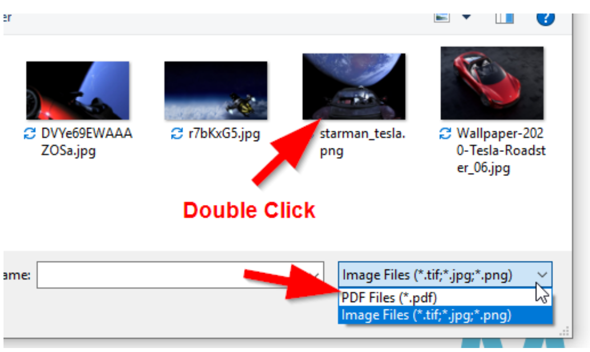
Next – Paste give you the ability to take any data you have copied to your Windows clipboard and paste it as a capture in PixCert.

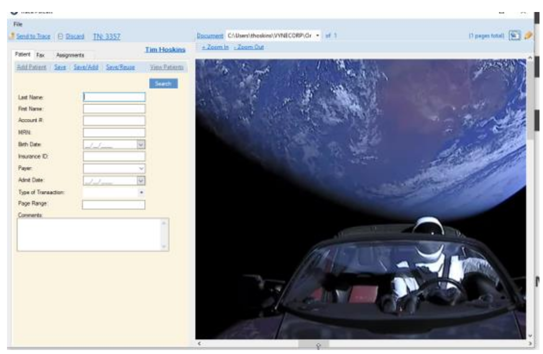


Example of data pasted from Notepad.

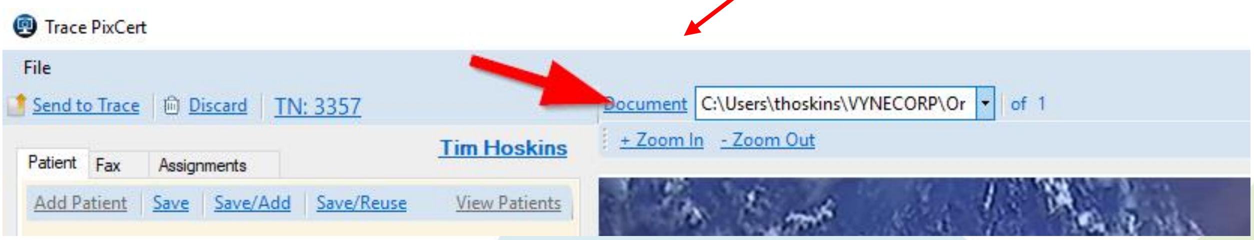


Lastly – Browse allows you to choose any document (PDF or image files (TIF,JPG,PNG). Once selected in the file browser dialog box you the document will show in the PixCert document viewer.

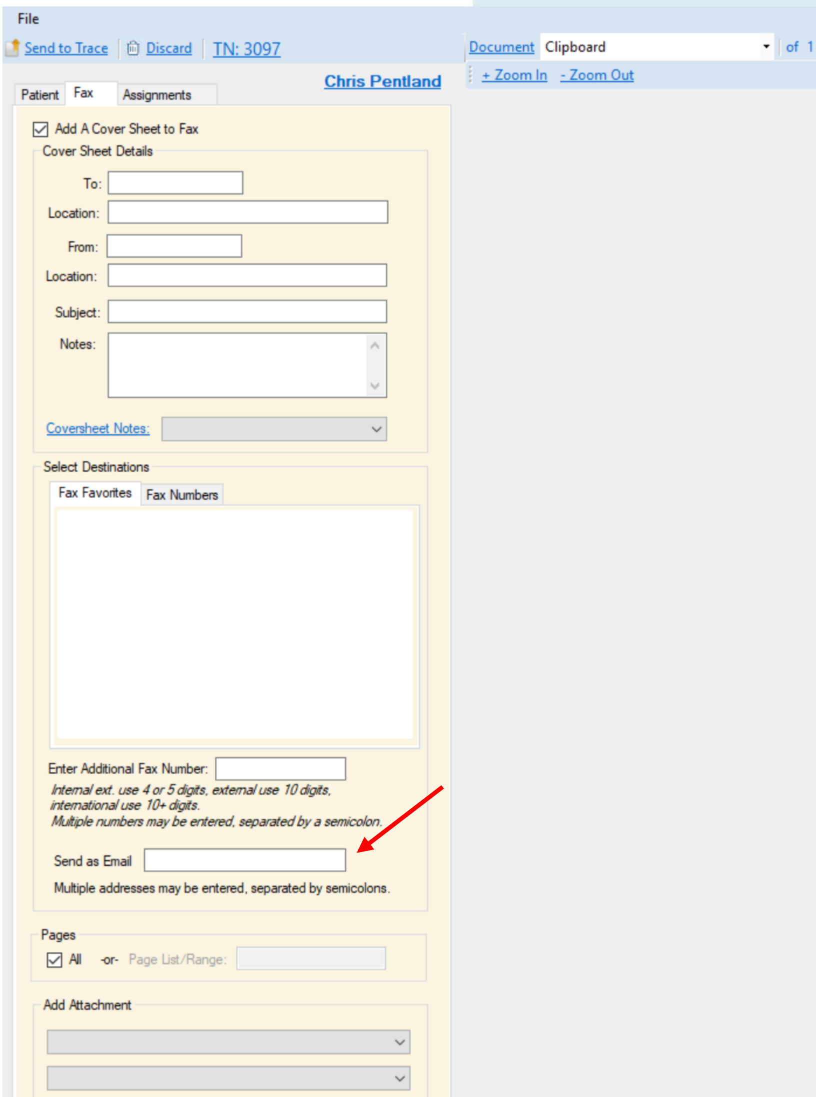




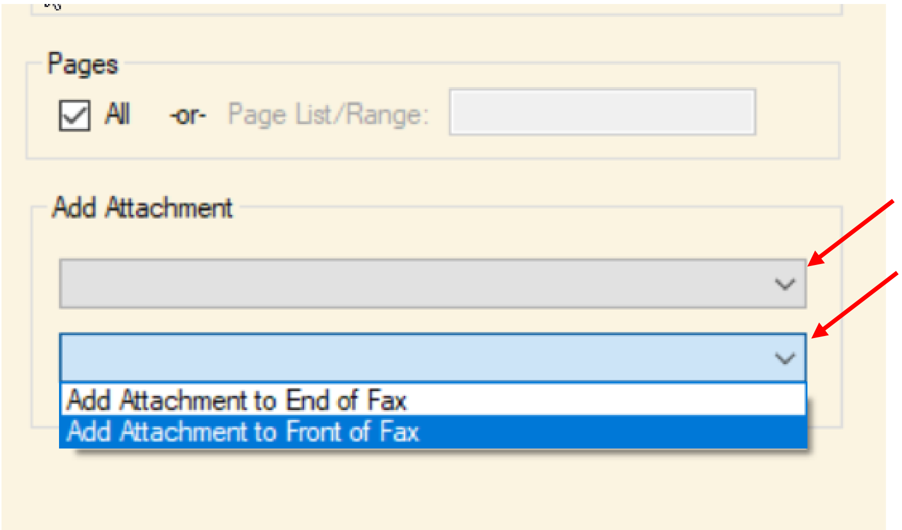
The PixCert main page will allow you to name the captures once completed Example: Clipboard



Under the Fax tab you will now see an area to enter and email address(s) to send out as well as fax numbers.

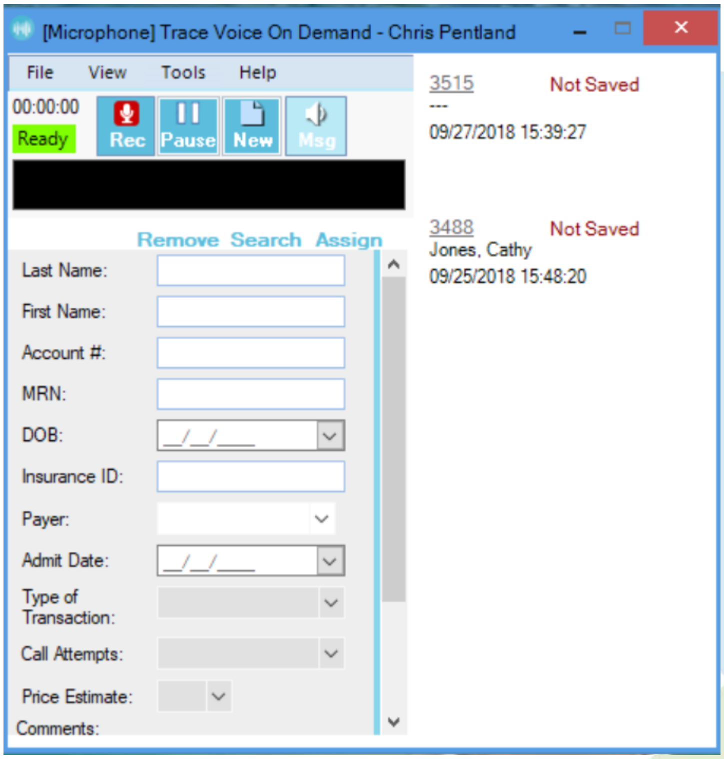


The attach a document that was in Tracker is also in PixCert as “Attach a Document” at the end of a fax or front of a fax.



Trace Voice On-Demand (TVOD)

No major changes except for cosmetic color changes.



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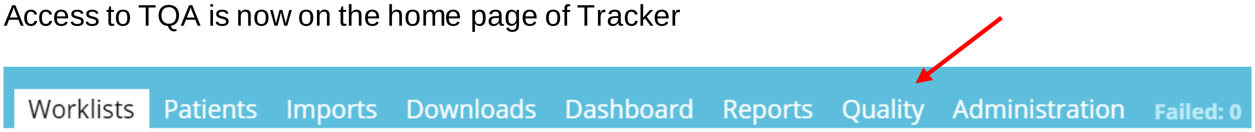
Trace Quality Assurance (TQA)

Best Practices Concerning Scorecards

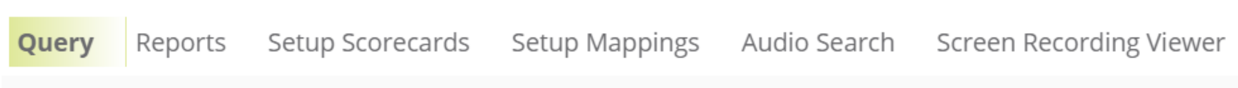
- Scorecards should be developed in a collaborative approach with the scoring staff. This will ensure all scorers are calibrated on the meaning of each question for fair and consistent scorings.
- The criteria measure in the scorecard should reflect what is important to your organization
- Typically, it's better to have more specific criteria, which is better for staff coaching and reporting
- Typically, scorecards are created for each primary staff function
- Remember, scorecards are dynamic and should change overtime to reflect the changing needs of your department and organization. Consider reviewing your scorecards' criteria each quarter for relevance.
- Scorecards templates are built into the TQA application and can be edited
- TQA provides easy tools to help develop your first scorecard and refine it over time.

Note: For N/A answers, point value will be recalculated based on number of questions/point value for questions that are applicable.

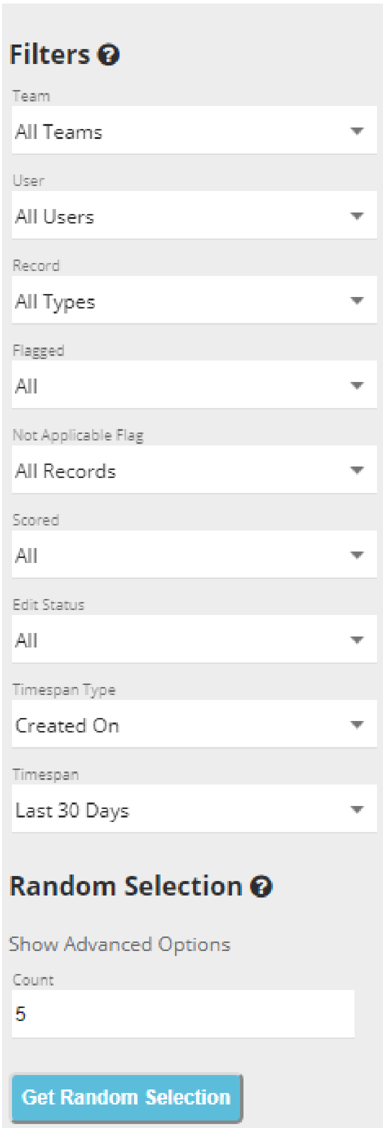
Access to TQA is now on the home page of Tracker



Tabs:



Query Tab:



Select team from dropdown

Select “All Users” or “User Name” from dropdown list

Select type of transactions to score

Select “Unflagged Only” or “Flagged Only” Example: Flagged=Incomplete Scorecard

Select “All Records”, “Only Not Applicable”, “Not Applicable” Example: Not Applicable=Poor Connection

Select transaction status: All, Scored, In Progress, Not Scored

Choose transactions for scorecards that have been edited or unedited

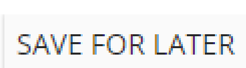
Option to select transactions that were created and not scored or previously scored/reviewed transactions

Select time frame

Show Advanced Options - select minimum duration of voice transaction

Randomizer to choose number of transactions to score

Scorecard Example:



Save uncompleted scorecard to be completed at a later time

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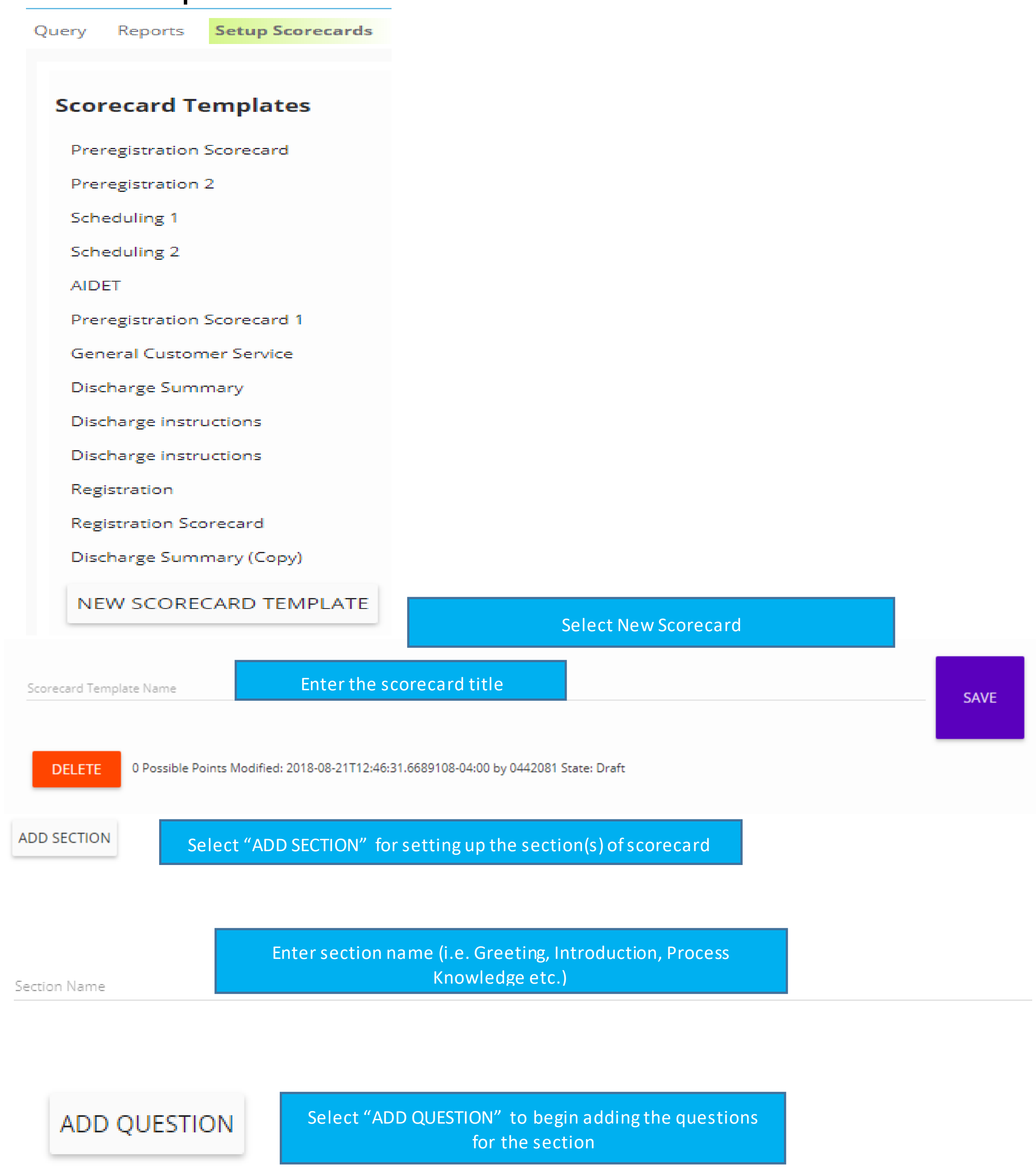
Scorecard Setup Tab:



Question Text

Radio Buttons

Dropdown

Add question to the "Question Text" line. Then choose "Question Type" from dropdown list

Answer Text | Points | Section Fail | Scorecard Fail

ADD ANSWER

Select "ADD ANSWER" and enter answer based on question type. Enter point value for answer. NOTE: Select "ADD ANSWER" to enter multiple answers and points

Answer Text		Section Fail	Scorecard Fail
Yes	10	☐	☐
No	0	☐	☐

Fail – If marked by scorer, staff will receive zero points for the entire section or the entire card

SAVE

Save information to scorecard

COPY

Copy scorecard to use for another team

PUBLISH SCORECARD TEMPLATE

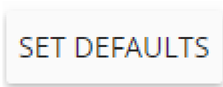
Teams can access scorecard for scoring. Select after completing the setup of the scorecard

DISABLE SCORECARD TEMPLATE

Inactivates a scorecard. Can be used in lieu of "Delete" scorecard option

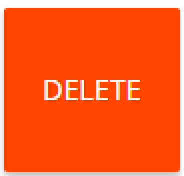
EXCLUDE FROM REPORTS

Removes the scorecard results to be utilized in reports
NOTE: Once a scorecard has been used, it may not be edited. You have the ability to copy the scorecard to a new card in order to preform updates.



Will set the scorecard to automatically be selected by default

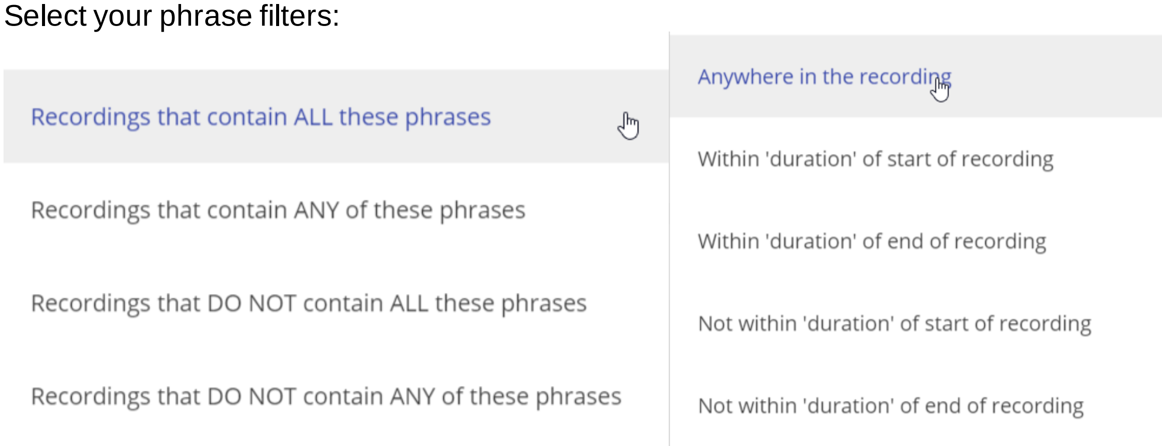
Deletes the scorecard.
NOTE: Previously scored data is deleted when scorecard is deleted.



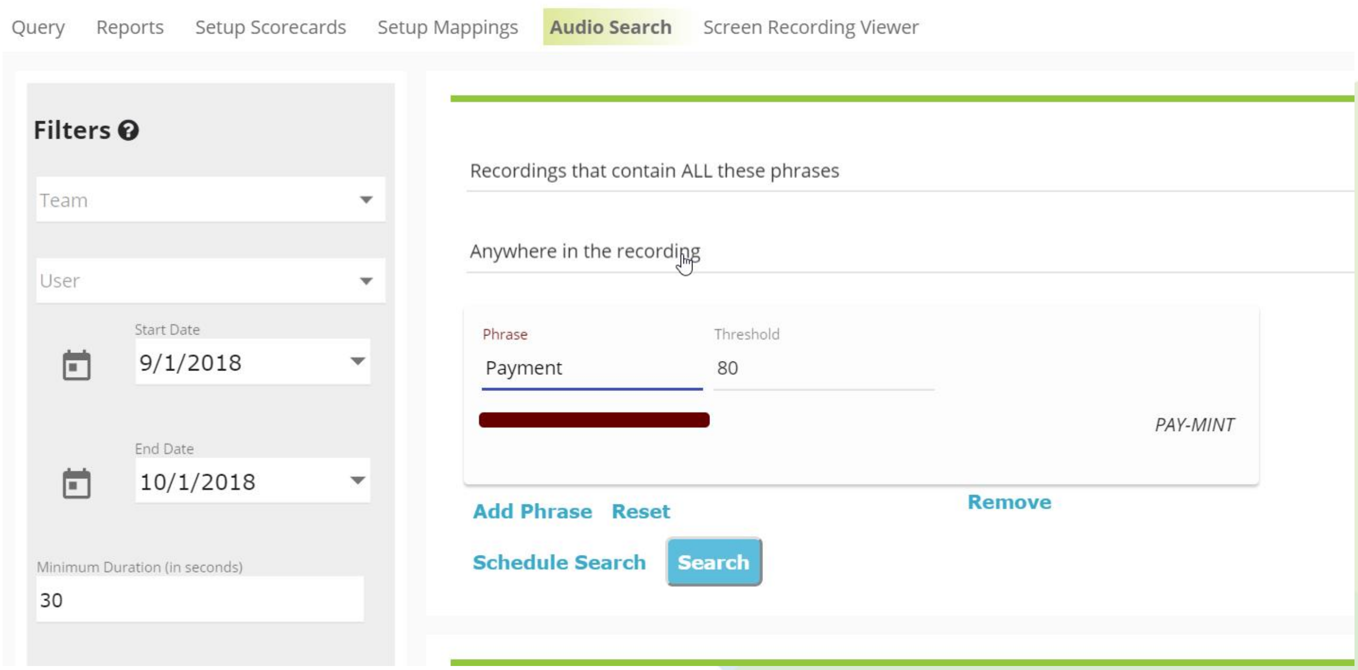
Delete option located in body of scorecard deletes line item(s)

Audio Search Tab:

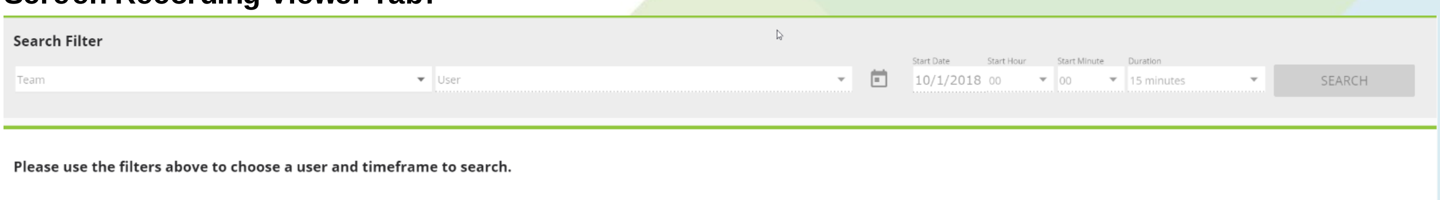
Select your phrase filters:



Type your phrase or word you want to search on: Example: “Payment”. Select your Team or User, date filters and duration seconds.

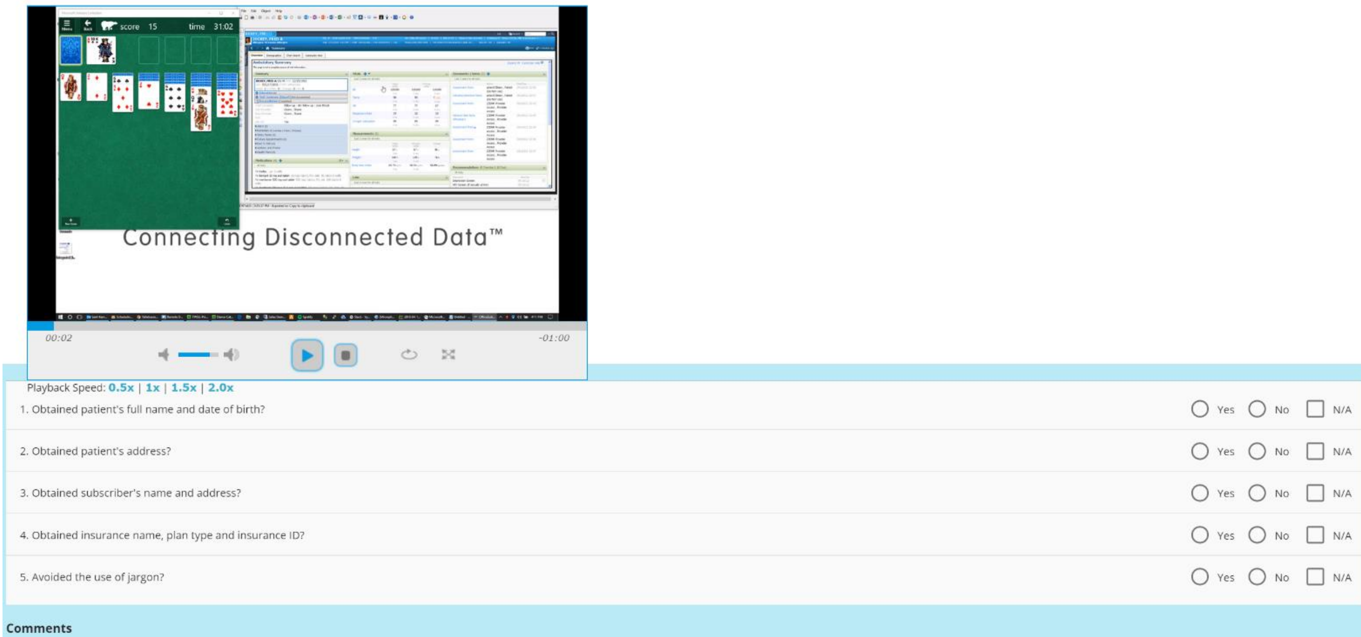


Screen Recording Viewer Tab:



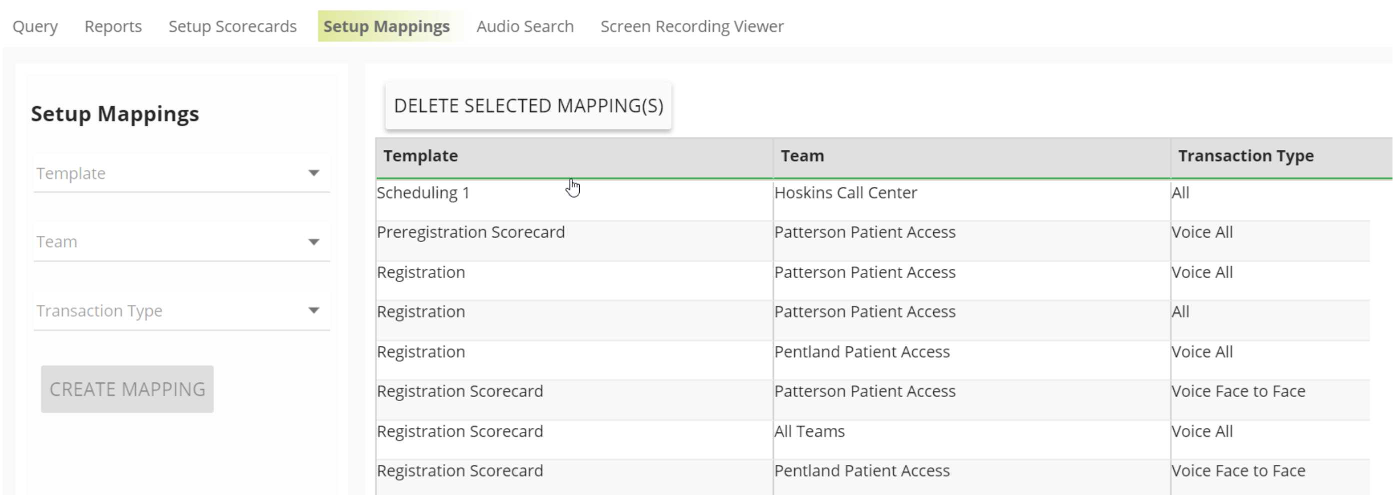
Coming soon!

Screen shot of a screen recording:



Setup Mappings Tab:

To view and designate what teams are assigned and using a scorecard template by transaction type. Example: Registration Scorecard should be used by the Registration Team for Face to Face Transaction Type.



Template	Team	Transaction Type
Scheduling 1	Hoskins Call Center	All
Preregistration Scorecard	Patterson Patient Access	Voice All
Registration	Patterson Patient Access	Voice All
Registration	Patterson Patient Access	All
Registration	Pentland Patient Access	Voice All
Registration Scorecard	Patterson Patient Access	Voice Face to Face
Registration Scorecard	All Teams	Voice All
Registration Scorecard	Pentland Patient Access	Voice Face to Face

Select your Template, Team and Transaction type