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## From the Office of Health Informatics Laboratory Front Desk Custom Settings and Filters October 7, 2024

### Customizing PathNet Application filters improves ease when searching for Orders. Adding frequently used application to the AppBar reduces the number of steps needed to log into each of the applications.

# Order Results Viewer (ORV) Setting Setup

- **<u>STEP 1</u>**: Open **ORV** and select **Cancel** to close the Find order popup.
- **<u>STEP 2</u>**: Left-click **View**, hover over **Customize** and select **Order List**.
- **STEP 3:** Select **Cancel Date**, **Cancel Personnel ID**, and **Cancel Reason** from the Customize Display.
  - Use the scroll bar to locate the additional column header.
  - The cancel related columns can be positioned by using the left and right arrows.

## **Reposition the Tool Bar Headers**

- **<u>STEP 1</u>**: Left-click to select the column header.
- <u>STEP 2</u>: Use <<Left or Right >> arrows to position these columns.
- <u>NOTE</u>: Click the Status header to filter the column by status. This arranges the Status column in alphabetical.

# Adding Diagnoses to ORV Demographics Banner Bar

- STEP 1: Open ORV.
- **<u>STEP 2</u>**: Select **Cancel** to close the Find order popup.
- **<u>STEP 3</u>**: Left-click **View**, hover over **Customize** and select **Demographics**.
- **<u>STEP 4</u>**: In the blank fields click the magnifying glass and add:
  - Ordering Diagnosis (Codified)
  - Ordering Diagnosis (Description)
  - Order Comments
- STEP 5: Click OK.

# Add PowerChart to the AppBar

**<u>STEP 1</u>**: Left-click the **A**.

|              |              | Results Ctri+R                 |
|--------------|--------------|--------------------------------|
| from the     |              | Container Details              |
|              |              | Specimens Ctrl+P               |
|              |              | Comments                       |
|              |              | Comment Viewer Ctrl+O          |
|              |              | Callback Comments              |
|              | Orders       | Chart Copy Requests            |
|              | Collect Date | Susceptibility Status          |
|              |              | Patient Demographics           |
|              |              | Case Demographics              |
|              |              | Review Path                    |
|              |              | Images Ctrl+G                  |
|              |              | Linked Relationships Ctrl+L    |
|              |              | Hide Future Orders             |
|              |              | ✓ Toolbar                      |
| Orders List  |              | <ul> <li>Status Bar</li> </ul> |
| Flowsheet    |              | Go To                          |
| Demographics |              | Options                        |
| Person List  |              | Customize                      |
|              |              |                                |

PathNet General Lab: Order Result Viewer [Order List]

Right>>

Mode View Help

| Que Customize Demographics  |      |  |            |          |  |  |
|---|------|--|------------|----------|--|--|
| Display: O Columnarview O Compressed view O Restore defaults        |      |  |            |          |  |  |
| Customize Options   |      |  |            |          |  |  |
| Notify me when current and historic demographics are different      |      |  |            |          |  |  |
| Display linked relationships alert                                  |      |  |            |          |  |  |
| Demographic Data Elements Columns: 4 ~                              |      |  |            |          |  |  |
| 1: Patient Name   | 0    | Patient Birth Date   | Alias, Per | son (SSN |  |  |
| 2: Alias. Person (MRN)  | ٩    | Aliae, Encounter (FIN NBR)                                 | Encounter  | r Type   |  |  |
| 3. Ordering Provider  | 4    | Attending Provider   | Ale Dat    | e/Time   |  |  |
| 4: Ordering Diagnosis (Codified)                                    | ۹,   | Ordering Diagnosis (Description)                           |            |          |  |  |
| Set Demographic Data Elements                                       | ×    | Set Demographic Data Elements                              | ×          |          |  |  |
| Value:  |      | Value:   |            |          |  |  |
| Ordering Diagnosis (Codified)                                       | ×    | Ordening Diagnosis (Description)                           | ~          |          |  |  |
| Description Displays the codified diagnoses associated to the order |      | Description<br>Displays the ordering diagnosis description |            |          |  |  |
| Example: 150.9  |      | Example: Acute appendicitie                                |            |          |  |  |
| Label:  |      | Label:   |            |          |  |  |
| Ordering diagnoses:   |      | Ordering dx desc: 🗹 Bold label                             |            |          |  |  |
| Missing data value:   |      | Missing data value:  |            | itis     |  |  |
| Stack if multiple values  |      | Stack if multiple values                                   |            |          |  |  |
| OK Cano   | el - | OK   | Cancel     |          |  |  |
|   |      |  |            |          |  |  |



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- **<u>STEP 2</u>**: Select **Customize**.
- **<u>STEP 3</u>**: Click the **Buttons** tab.
- **<u>STEP 3</u>**: Scroll and select **PowerChart**.
- STEP 4: Select OK.

### **Setting PowerChart Filters**

### Default View

Items in the menu cannot be rearranged, setting the Orders page to default open will improve efficiency.

- **<u>STEP 1</u>**: Open PowerChart.
- **<u>STEP 2</u>**: Right-click **Orders** from the Menu.
- **<u>STEP 3</u>**: Select **Set as Defaul**t.

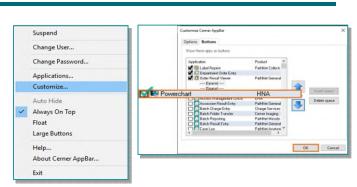
#### Adding Columns

- **<u>STEP 1</u>**: From **Orders**, locate **Current** in the top toolbar and then select **Customize View**.
- **<u>STEP 2</u>**: Locate **Ordering Provider** within the **Available columns** list and move to **\*Selected**, above details.
- STEP 3: Select OK.

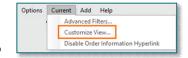
### > Set Order Profile Filters.

- **<u>STEP 1</u>**: From Orders, select **Displayed** hyperlink.
- **<u>STEP 2</u>**: Select only the following within the Advance Filter window:
  - Active Statuses: Order and Future.
  - Inactive statuses: Discontinued.
  - Load the following types of orders: Ambulatory (In Office) orders.
  - Miscellaneous: Show individual instances for continuing orders.
    - This is what displays the reoccurring orders.
- **<u>STEP 3</u>**: Click **Save As** to enter a **List Name**.
  - Example: Lab Phlebotomy.
- **<u>STEP 4</u>**: Select **OK**, then select **Apply** to apply the filter and close the window.

For questions regarding process and/or policies, please contact your unit's Clinical Educator or Health Informaticist. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.





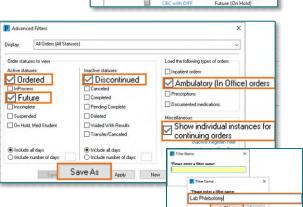


Future (On Hol

red: All Active Orders | All Inactive Orders | All Orders (All Sta

V Order Nar

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