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Source Medical Solutions, Inc.
Attn: Learning Center of Excellence
866 North Main Street Ext.
Wallingford, CT 06492
Fax 203–949–6299
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Vision Basics

Before we begin, there are a few basics that should be reviewed about the Vision software. Understanding these basic features will help you better understand the more complex features of the system.

Logging In

Logging into Vision requires a Username and Password. After double clicking on the Vision icon, you will see the above screen where your personal Username and Password can be entered. After entering both the Username and Password, click Log in.

Keep in mind, the Username and Password are case sensitive and the system may require a change to the Password on a periodic basis. Depending on your facility’s settings, the system may or may not allow the same password to be used again.

Be aware that if the Username and/or Password are repeatedly entered incorrectly or if a user has exceeded the time span for system inactivity, the account will become locked and will need to be unlocked by the system’s administrator. The number of attempts a user will have when entering a password and the time span for inactivity are determined by the facility’s settings.
System Wide Features

Arrow 1:
The first arrow at the top points to the software header, which displays the Source Medical software that you are currently using. You will also find the designated four letter support code for your facility. For example if your surgery center was “System Test Ambulatory Surgery Center,” you may see on your top row “Vision – TASC.” You will need this four letter support code whenever you contact the Vision Support Team.

Arrow 2:
The second arrow points to the toolbar that list all of the general categories of the Vision system. By left clicking on any of these toolbar headers, you will see a list of specific modules in the system you can open. For example, if you were to left click on the “Financial” toolbar header you would find links to modules such as Post Charges or Payments & Adjustments.

Arrow 3:
The third arrow points towards the picture icons that are direct links to the specific modules in the Vision system. These are quick and easy ways to get to these modules if you know exactly where you want to go. For example, instead of left clicking on the “Financial” toolbar followed by left clicking Post Charges, you may simply left click on the Post Charges icon. Not all modules are accessible from the picture icons.

Arrow 4:
The fourth arrow points to the Vision Managers. Left clicking on any of the given managers will open that manager, which will have a number of picture icons. Like the picture icons from Arrow 3, these icons are direct links to the specific modules.

Arrow 5:
The fifth arrow points to the Open Windows. In the above screen, you will see that there are currently no open windows. As you open different modules in the system, a link to that open module will appear in the Open Windows box. Always be aware of what windows you have opened so that you can avoid potentially duplicating your work.
Administrative Libraries

Vision Libraries are the central data storage lists for many of the data elements used throughout the system; therefore, they are a core component of the Vision system. Proper setup and maintenance is critical in ensuring optimal performance and functionality of the software and proper reporting.

The following documentation outlines the Administrative Libraries which are typically managed by administrative staff or super users. Many of these libraries are required by other libraries and should therefore be populated first.

The Administrative Libraries have been broken into three different categories based on overall impact on the facility.

- **Required** – Required libraries are required throughout the system including other libraries and should be populated before moving forward with the library building process.
- **Recommended** – Recommended libraries are not required for product functionality, but play a key role in maximizing utilization of the system. While they are not required, we recommend that they be populated during the building process.
- **As Needed** – As Needed libraries have minimal impact on the system or are populated with necessary data during the installation. Users should only focus on these libraries once all required and recommended libraries have been populated.

Navigation

The **Library Manager** is directly accessed from the “Libraries” button located on the menu bar toward the top of the home screen. It can also be accessed from the Facility Drop–Down Menu and Financial Manager.

In the Libraries list on the left side of the window, users locate the desired library by using the scroll bar in the Libraries window. In order to add or modify library entries, the desired library must be selected by left–clicking on the library description.
Existing library elements will be displayed in the grid below the library list.

<table>
<thead>
<tr>
<th>Key</th>
<th>Description</th>
<th>Active</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Block</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>General</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Local</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>MAC</td>
<td>✔</td>
<td></td>
</tr>
</tbody>
</table>

Once library elements are displayed, users can search existing elements using the search window to ensure that duplicate entries are not entered.

To add a data element to a Library, click the **ADD** button at the bottom of the screen.

To update or change a data element, select the data element and click the **UPDATE** button at the bottom of the screen.

To remove a data element, select the data element and click the **REMOVE** button at the bottom of the screen. **Removing a data element makes that item inactive. Elements cannot be deleted from the system.**

To inquire or view a data element without the ability to save changes, select the data element and click the **INQUIRE** button at the bottom of the screen.

Note: When adding or modifying a library entry, all BOLD fields are required to be populated prior to saving. Non–bolded fields are not required for saving, but they may be important for use at the facility so it is important to determine which non–bolded fields should be populated.
Required

Staff Groups Library

Vision is comprised of various components and modules. User access to these components and modules is managed through the Staff Group library. For this reason, it is recommended that only administrative staff be allowed to make modifications to this library.

The Staff Group library allows users to create security groups that staff members are assigned to in order to organize the staff permissions at your facility. Staff Groups are typically created by job function but can be further defined by individual user based on the security needs of the facility. For example, members of a 'Scheduling' staff group could be restricted to scheduling of appointments, population of patient demographics, and printing of scheduling reports.

Dependencies – None, this library can be built at any time.

General

The Staff Group library is organized into three main sections. These sections are separated by the tabs located at the top of the library entry. The General tab contains basic library information.

- **Description** – Enter the appropriate description for the staff group. Users may search by this description, so it is helpful to use terminology that most accurately describes the item.
- **Active** – By default, when a new library item is created, it is assigned the active status. Any item that is currently available in your facility should be set as Active. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system. However, they can be added back to the drop-down lists at any time by re-activating the item.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
Default Report Group – Select the group that best suits this Staff Group’s reporting needs. While this is not a required field, it may be beneficial to assign a Report Group if members of this group will commonly require access to a series of reports. Assigning a report group will ensure that the Report Group assigned is automatically displayed when any member of this group accesses the Reports menu.

This Staff Group will use the Discharge window and Not Discharge Instructions –
- **Checked** – They can select the Discharge Utility in the chart manager or the EHR Manager but have no access to the discharge instructions utility.
- **Unchecked** – They have access to the discharge utility from the EHR Manager or the discharge instructions utility in the chart manager.

CPOE

If members of the selected staff group will interact with the CPOE, it is important to assign various ordering privileges using the available options.

- **Requires Co–Signature** – Select to indicate if the staff member requires a co–signature when placing an order in the CPOE.
- **Can Approve Non–Formulary** – Select to indicate if the staff member has the ability to approve non–formulary drugs.
- **CPOE Worklist Type** – If members of the Staff Group will manage orders using a worklist, select the worklist type used by members of the group. The options available in this drop–down are managed in the CPOE Worklist Type library.

Security

The Security tab of the Staff Groups library is where specific security levels for Vision system usage are assigned. The Security Checkpoint description box provides a summary of the main functions of the Vision. Each function is then broken down into sub–sections where individual items and tools can be restricted. These security checkpoints define which modules the users associated with the Staff Group have access to and how much access is granted within each module.

Access may be granted for an entire Vision function by selecting the checkbox next to the main function. Security access may also be granted on a more specific basis by expanding the function header and selecting specific functions. Users can be provided View Only or Add/Update functionality. If Add/Update access is given, the View Only access must also be provided.
Please note that any changes made to the Staff Group security levels will take effect the next time the user logs into Vision.

To allow full access to a general function:

- Select the checkbox to the left of the function's name, for example, **EHR** as shown in the example above. The list expands to displays all components which are all checked.

To allow limited access to some modules:

1. Select the + (plus) sign next to the function’s name.
   - The list expands to displays all components which are all checked.
2. To allow access to some subcategories for the module, check the box next to that item.
   - **View Only** access will let the user access that area but will not let them edit any information.
   - **Add/Update** access will let the user access that area and update any information.
Clinical Licensure

The Clinical Licensure library allows users to list the licensure abbreviations that follow staff member names when applying an eSignature to a page in the patient record. These licenses are attached to staff and providers in the Staff library.

**NOTE:** Only one entry form this library can be attached to each entry in the staff library. Special entries need to be made for staff and providers who have multiple credentials.

**Dependencies** – None, this library can be built at any time.

- **Description** – Enter the abbreviation for the license(s).
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
Staff Roles

The **Staff Roles** library allows users to define the job roles of staff members. These roles provide benefits for tracking clinical roles. Business office roles can be added, but they do not add value to the system aside from providing a label in the **Staff** library.

**Dependencies** – None, this library can be built at any time.

- **Description** – Enter the name of the job role.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Is this a Provider?** – Indicate if this is a provider role. If a person is attached to a case with this role, they will not appear as staff in a case cost report.
- **Approximate Gross Annual…** – Case costs for clinical labor can be calculated using an average salary per staff role. If this is how your case costs are to be calculated enter the average salary pro-rated to a 40 hours a week, 52 weeks a year.
- **This role is available for a clinical assignment** – Check this box if the staff associated with this role would benefit from having specific charts assigned to them for easy access in the EHR Chart Manager.
- **This role is able to modify, submit, and approve orders in the Pharmacy Worklist** – Check this box to give this group the ability to modify, submit, and approve orders in the Pharmacy Worklist.
Staff Library

The Staff library allows users to add and manage staff member information including relevant details such as address, telephone numbers, role, supervisor, and salary as well as user login information.

**NOTE:** If the facility is a multi-OU facility, then staff members must be added in the Staff Master library first. Using the Staff Master library allows the staff members to be available to all organizations within the facility. This eliminates the need for entering a staff member’s information for each OU that they are associated with.

All facility staff members regardless of whether the staff member will need login access to Vision will need to be added to this library.

Providers who require access to the Chart Manager will also need to be added to this library so they can be assigned login and security credentials.

**Dependencies** – The Staff Groups, Staff Roles, and Clinical Licensure libraries have sufficient default information to allow this library to be built at any time, but it is recommended to review those defaults prior to beginning work on the staff library.
General

The Staff library is organized into five main sections. These sections are separated by the tabs located at the top of the library entry. The **General** tab contains general information about the staff member.

- **Person** – This field is a searchable list of all people that have been entered into Vision. Search here for the staff member by last name to avoid duplicates.
- **Active** – By default, when a new library item is created, it is assigned the **active** status. Any item that is currently available in your facility should be set as **Active**. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system. However, they can be added back to the drop-down lists at any time by re-activating the item.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Last, First Name, MI, Suffix, and Initials** – Enter the staff member’s name information. Only the first and last name is required but middle initial, suffix, and initial information can also be entered as needed.
- **Supervisor** – Select the staff member’s supervisor from this list. Entries in the drop-down list are pulled from the Staff library, so supervisor staff must be entered prior to attaching them to other staff.
• **Can be Scheduled** – The Can be Scheduled option allows users to enable the ability to schedule individual providers if needed. For most staff members, this field will be unavailable since it does not apply to staff members, only providers.

• **Min. Time Allocation** (Minutes) – If the staff member is eligible for scheduling, this field allows for the minimum scheduling allocation to be assigned in minutes.

• **Collections** – These options only apply to facilities who have purchased the Collection Manager add–on product.
  - **Is a Collector** – Select this option if this person would be assigned the collector role for specific accounts.
  - **Is a Master Collector** – Select this option for users needing administrative access to the Collection Manager. This option provides the users special privileges including the ability to see other collector’s accounts in the Collections Manager as well as reassigning accounts to other collectors.

• **Role** – Select the appropriate role for the staff member from the drop–down list. Vision comes populated with a number of available staff roles, but additional roles can be added in the Staff Role library.

• **Clinical Licensure** – Select the applicable clinical license for the staff member from the drop–down list. Vision comes populated with a number of available clinical licensures, but additional licensures can be added in the Clinical Licensure library.

• **SSN** – Enter the staff member's social security number. The number will be formatted automatically as the numbers are typed into the field.

• **Date of Birth** – Enter the staff member’s date of birth. The date will be formatted automatically as the numbers are typed into the field.

• **Age** – The age will be calculated automatically after entering the date of birth.

• **Gender** – Enter the gender of the staff member.

• **Spouse/Partner** – Enter the spouse or partner of the staff member.

• **Marital Status** – Select the appropriate marital status from the drop–down list.

• **Address/Phone Number/Email** – Enter the staff member's address, phone number, and email address here. To add multiple entries under a section, click **Save** in that section of the screen. Select the corresponding **Type** for each entry, and use the Primary checkbox to indicate which entry is the primary contact method.

• **Scan Image/Import Image** – Select applicable button to scan or import an image that can be attached to this staff member's file.
Security
The security tab is where login and passwords, staff groups and other security related options for the staff member are assigned.

- **System usage allowed?** – Select *Yes* to allow the user access to log in to Vision. This option requires the staff member to be assigned a login, password, organization, and staff group. Select *No* if the staff member needs to be associated with cases, but does not need log in access to Vision. If *No* is selected, none of the information on this tab is required.
- **Login Name** – Enter the login name for the staff member here. The login may consist of alpha and numeric characters and there is no minimum number of characters.
- **Current Password** – This field is only active when changing the password on an existing entry. The current password for the patient is masked here. This field is for reference only and is not editable.
- **Password** – Enter the new password for the staff member. Passwords must be a combination of alpha and numeric characters, be a minimum of six characters, and are case–sensitive.
- **Confirm Password** – Confirm the new password for the staff member by re–entering it here.
- **Default Organization Unit** – Select the organization unit that the staff member will be automatically logged into. If there is only one organization in your facility, the drop–down list will only display that facility’s name.
- **Staff Group** – Select the Staff Group that the staff member belongs to. The group the staff member is associated with will control their system access privileges.
- **Default Report Group** – Select the Report Group that best suits this staff’s reporting needs.
- **Allow Staff to Reset/Unlock Accounts?** – Select *Yes* to give the staff member access to the Account Management tool used to unlock accounts and reset passwords. This should be reserved for administrative and management staff.
**Itemized Billing**

The itemized billing tab of the Staff Library is not currently available.

**Compensation**

The compensation tab allows users to enter annual salary information for clinical staff members strictly for the purpose of generating case costing reports.

- **Approximate Gross Annual Compensation without Benefits** – Enter the dollar amount of the salary for the staff member.
  - If this field is populated, case costing reports will make calculations using the value entered when the Staff compensation source is selected. If users are not comfortable entering individual staff member salaries, salaries can be estimated by staff role and entered in the Staff Role library.
EHR

The EHR tab allows users to assign specific access privileges to the Chart Manager and patient charts within the Chart Manager for individual staff member.

Page Control

- **Can Inactivate a Page** – Select to allow this specific staff member the ability to inactivate a chart page.
- **Can Activate a Page** – Select to allow this specific staff member the ability to activate a chart page that has been inactivated.
- **Can Annotate on a Page** – Select to allow this specific staff member the ability to add annotations on a chart page.
- **Can Override Lock** – Select to allow this specific staff member the ability to unlock a locked page in a chart.
Chart Completion

- **Can mark a chart complete** – Select to allow this specific staff member the ability to mark a chart complete.
- **Can mark a chart incomplete** – Select to allow this specific staff member the ability to mark a chart incomplete that was previously marked complete.
- **Has override ability when marking a chart complete** – Select to allow this specific staff member the ability to override conflicts when marking a chart complete.

Chart Printing

- **Can perform Chart De–Identification** – Select to allow this specific staff member the ability to mask patient information when printing whole charts.

Chart Access

Select the level of staff access to patient charts. The available options for the two drop–down menus pull from the Provider’s and Provider Groups library, so providers and provider groups must be added prior to utilizing these options.

- **No Access** – Select to prevent the staff member from accessing any patient charts.
- **Staff Member has access to all charts** – Select to provide the staff member access to all patient charts.
- **Staff Member is a provider with access to their own charts** – Select to provide the staff members who are also providers access to only their patient charts. This applies to both the scheduled surgeon/provider and the attending surgeon/provider.
- **Staff member has access to this provider's chart** – Select to provide the staff member access to an individual provider’s patient charts only. This applies to both the scheduled surgeon/provider and the attending surgeon/provider.
- **Staff member has access to this physician group’s charts** – Select to provide the staff member access to all patient charts associated with providers in a specific provider group. This applies to both the scheduled surgeon/provider and the attending surgeon/provider.
- **Authorized Chart Emergency Access** – Select to provide the staff member (temporary) emergency access to a patient’s chart they otherwise would not have access to. When a chart is accessed in this fashion, an audit trail is created. This option should be checked for providers to allow them to intervene in patient care in emergency situations where the patient’s scheduled/attending doctor is unavailable.

Electronic Signature

- **Use Electronic Signature for this Staff Member** – Select to provide the staff member electronic signature abilities.
- **PIN** – Enter the 4–digit pin that this person will use for electronic signature. Once set, it will not change. This PIN must be a unique number and no other user can use that same PIN. If the PIN is currently being used by someone else, a pop–up is displayed upon clicking **Save** which reads: **This pin is in use by another user. Please select a new pin.** Click **OK** and enter a new PIN.
Organization Unit Library

The Organization Units library contains administrative and billing information regarding the facility. The information contained in this library is used in many of the reports and forms used at the facility such as insurance claims, purchase orders, and patient statements.

**Dependencies** – None, this library can be updated at any time.

**General**

- **Org Unit Name** – This is the legal name of the facility. The name of the facility cannot be modified by users, so any changes will need to be made by a Source Medical employee.
- **Active** – The organization is automatically assigned the active status and should never be unchecked by users.
- **Key** – The key is the four letter identifier assigned to the facility by Source Medical and cannot be modified.
- **NPI** – Enter the facilities National Provider Identifier number here.
- **Website** – Enter the facilities website if applicable.
- **Tax ID** – Enter the facilities Tax Identification number here.
- **Sales Tax** – Enter the sales tax rate for the facility as a whole percentage.
• **IP Address** – Enter the external IP address for the facility’s Vision server. Vision uses this IP address for data exchange and communication purposes with applications outside of Vision.

• **State Report ID** – Enter the facility State Report ID number if applicable for the facility.

• **Taxonomy Code** – Enter the facility Taxonomy Code number can be entered into this field. These are administrative code set used for identifying the provider type and area of specialization for healthcare providers. They are alphanumeric and are ten characters in length.

• **Location Number** – Enter the Location Number used by the facility to identify the specific organizational unit. This number is pulled to Loop 2310A on the X12I.

• **Maximum Vision Licenses** – This field is a read–only field which displays the number of Vision licenses purchased by the facility.

• **Time Out Action** – This drop–down allows users to control what happens to the user license if their session times out, Expire License or Keep Session Active.

• **Address** – Enter the facility’s physical address in these fields. A default address may be loaded during installation, but can be modified by selecting on the existing entry.

• **Phone Number** – Enter all of the phone number for the facility. To add multiple entries, click Save and add any additional number ensuring the Primary checkbox is selected for the primary number only.

**Options**

This tab is not used in the Specialty Hospital version.

**Cost Profile Library**

The Cost Profile library allows a facility to store and manage annual, projected fixed costs for the purpose of running case costing reports. A facility can maintain multiple cost profiles depending on the data that needs to be included in the reports. For example, users can create a separate cost profile that could be used to estimate the impact of increased overhead costs on facility revenue. Some reports require at least one ‘Cost Profile’ to be created.

**Dependencies** – None, this library can be built at any time.
- **Cost Profile Description** – Enter the description for the cost profile. Since it is possible to have multiple profiles, use a description that accurately describes the entry.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Active** – By default, when a new library item is created, it is assigned the active status. Any item that is currently available in your facility should be set as Active. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system. However, they can be added back to the drop-down lists at any time by re-activating the item.
- **Cost Allocation Method** – Select the desired method for the fixed costs to be allocated to the case. Users can choose between fixed cost per case or per O.R. minute.
  - Fixed cost per case will divide the total of the fixed costs by the projected number of cases. The value will be assigned as a fixed cost in the case costing reports regardless of case length.
  - Fixed cost per O.R. minute will divide the total of the fixed costs by the projected number of O.R. minutes. The value of the fixed cost per case will be assigned to individual cases based on case length in minutes. For this reason, this method is considered to be more accurate in allocating fixed cost per case.
- **Projected Number of Cases** – If using the fixed cost per case allocation method, enter the projected number of cases performed at the facility annually.
- **Projected Number of O.R. Minute** – If using the fixed cost per O.R. minute allocation method, enter the projected number of O.R. minutes utilized at the facility annually.
- **Supply Cost Markup Percentage** – If the facility would like to increase the estimated cost of supplies by a set percentage on case costing reports, enter the percentage as a whole number in this field.
- **Annual Projected Fixed Costs** – The system has eight categories that will automatically be visible on the case costing reports. The total of annual fixed costs can be split up into these categories to better display the breakdown of fixed costs on a case costing report.
- **User-Defined Annual Projected Fixed Costs** – If users would like to further break down the total of the fixed costs, they can utilize the five additional user-defined categories. In order for these fields to show up on a case costing report, users must enter a description of the projected fixed cost in a Description text box. To the right of the Description box is a Cost text box where the dollar amount spent on the item annually is entered.
Recommended

Note Group Library

Notes are used throughout the Vision system for documenting patient and facility information. Because notes can be reported and filtered, Note Groups are used to classify the different types of notes into categories that can be better managed. The system comes with seven default note groups but additional groups can be created as needed: Billing/Collections, Chart Notes, Clinical, Credentialing, Other, Resource Mgt, and Scheduling.

Dependencies – None, this library can be built at any time.

- **Note Group Description** – Enter the description for the Note Group. Several reports can be organized and filtered by Note Group, so it is important to use a description that accurately describes the entry.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
Notes, Standard Library

The Notes, Standard library allows users to create and manage pre–packaged notes that can be added to various areas of the Vision system. This allows users to standardize commonly used notes for all staff members and reduce data entry time. One example would be creating a standard note that is attached to a patient account any time they are sent to collections.

Dependencies – The Note Group library is referenced in this build, but contains sufficient default entries to begin creating entries in this library at any time.

- **Description** – Enter the description for the standard note. Since users will select the desired note based on the description, it is important to use a description that accurately describes the entry.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Active** – By default, when a new library item is created, it is assigned the active status. Any item that is currently available in your facility should be set as Active. Items that are no longer used may be set as inactive in order to remove them from drop–down lists throughout the system. However, they can be added back to the drop–down lists at any time by re–activating the item.
- **Alert?** – Assigning either a Yes or No in this field will automatically default the Alert? status when creating the note. If the standard note will commonly require an alert, select Yes. If not, select No.
- **Note Group** – Select the Note Group that the standard note should be categorized as. This will allow users to filter the list of standard notes by group.
- **Note Text** – Enter the complete note text into this free–text field. This text will be the content of the note when the standard note is selected.
Tasks, Standard Library

The Tasks, Standard library allows users to create and manage pre–packaged tasks that can be assigned in the Task Manager. This allows users to standardize commonly used tasks for all staff members and reduce data entry time.

**Dependencies** – None, this library can be built at any time.

- **Description** – Enter the description for the standard task. Since users will select the desired task based on the description, it is important to use a description that accurately describes the entry.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Active** – By default, when a new library item is created, it is assigned the active status. Any item that is currently available in your facility should be set as Active. Items that are no longer used may be set as inactive in order to remove them from drop–down lists throughout the system. However, they can be added back to the drop–down lists at any time by re–activating the item.
- **Default Priority** – Select the desired default priority that should be assigned to this task when it is selected. Options include: High, Medium, and Low.
- **Default Manager** – Select the default Vision Manager should be assigned to this when it is selected. Options include: Case, Facility, Financial, Output, People, Quality, Resource, Schedule, Task, Help–Support
- **Supervisor** – If the standard task should enter a default supervisor upon creation, select the supervisor from the drop–down list. Entries in this list are managed in the Staff library.
- **Notify Supervisor if not completed on Time** – Check this box to default the supervisor notification when creating a task using the standard task.
- **Destination** – If the task is specific to an area of the system, users can have the task take the assigned user to a specific area in the Vision system. To utilize this feature, choose the area of Vision that the task should take the user to.
- **Task Text** – This is a free text field which contains body of the task. This information can be modified when creating the task from the standard task.

**Credentialing Element Library**

The Credentialing Element library allows users to create and manage the different element criteria that are used in the Credentialing Manager for credentialing facility providers and staff. These elements can be tracked and reported on to ensure facility compliance. Users will need to add credentialing elements before they can be tracked in the Credentialing Manager.

**Dependencies** – None, this library can be built at any time.

- **Element Name** – Enter the description for the credentialing element. Since elements are tracked and reported on by name, it is important to use a description that accurately describes the entry.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Active** – By default, when a new library item is created, it is assigned the active status. Any item that is currently available in your facility should be set as Active. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system. However, they can be added back to the drop-down lists at any time by re-activating the item.
- **Default Value for Alert Setting in Credentialing?** – Select the default alert value when adding the element to a staff or provider credentialing file. This entry defaults to Yes to alert the user if this element for a surgeon/staff member is invalid or expired. The user is alerted at the time of scheduling if the Settings are set properly, or when running the Credentialing List & Alerts report.
- **Type** – Select a credentialing type from the drop-down menu: License/Certificate, Education, and Clinical. This type allows users to select which category the credentialing element falls under. Credentials are organized by this type in the Credentialing Manager.
As Needed

Documents, Standard Library

The Documents, Standard library allows users to create and manage document type categories that are attached to documents scanned into Vision using the Electronic Document Manager. These document types can be categorized into four different main categories which include Case, Registration, Financial, and Order Management.

Dependencies – None, this library can be built at any time.

- **Description** – Enter the description for the document type. Since users will select the desired document type when filtering items based on the description, it is important to use a description that accurately describes the entry.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Active** – By default, when a new library item is created, it is assigned the active status. Any item that is currently available in your facility should be set as Active. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system.
- **Document Classification** – Select the document classification that corresponds with the document type: Case, Registration, Financial, and Order Management.
Case Classification Library

The Case Classification library allows users to create categories for the classification of cases. These classifications are assigned to the case in the Registration screens and allow for filtering and reporting of cases on custom reports.

Dependencies – None, this library can be built at any time.

- **Description** – Enter the description for the case classification. Since can filter and report on cases based on the description, it is important to use a description that accurately describes the entry.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Active** – By default, when a new library item is created, it is assigned the **active** status. Any item that is currently available in your facility should be set as **Active**. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system.

Country Library

The Country library stores the names and identifying codes for the countries that are attached to cities in the Cities library. This library comes pre-populated with six counties, but additional countries can be added as needed.

Dependencies – None, this library can be built at any time.

- **Country** – Enter the country name.
- **County Code** – If applicable, enter the county code.
- **Active** – By default, when a new library item is created, it is assigned the **active** status. Any item that is currently available in your facility should be set as **Active**. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system.
City Library

All cities used within Vision are added and maintained in the Cities library. This includes the cities in which patients reside or receive bills, insurance carrier claim processing centers, physician offices, vendors, and all other types of organizations in contact with the facility. Once a city has been entered into the Cities library, it can be assigned to an address. This library comes pre-populated with zip codes associated with your state. Notify your implementation manager if zip codes from neighboring states are needed as well.

Dependencies – Entries in the Country library are required; however, it has sufficient default entries to allow entries to be added to the City library at any time.

- **Zip or Postal Code** – Enter the five digit zip code for the city.
- **City** – Enter the name of the city as it should appear on mailings and reports.
- **State or Province** – Enter the appropriate abbreviation for the State or Province.
- **County** – If applicable, enter the corresponding county for the city.
- **County Code** – If applicable, enter the county code.
- **Country** – Select the appropriate country. If the desired county is not listed, it can be added in the Country library.
- **Active** – By default, when a new library item is created, it is assigned the active status. Any item that is currently available in your facility should be set as Active. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system.
Work Groups Library

The Work Groups library allows users to assign specific staff members to a work group. The Work Group feature works in conjunction with the Task Manager and allows users to assign tasks to a defined group of users. Tasks assigned to groups are viewable and can be completed by anyone belonging to that group.

Dependencies – None, this library can be built at any time.

General

- **Description** – Enter the description for the work group. Since users will assign work group tasks based on the work group description, it is important to use a description that accurately describes the entry.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Active** – By default, when a new library item is created, it is assigned the **active** status. Any item that is currently available in your facility should be set as **Active**. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system.
Users

- **Available Users – Members** – Staff members are organized into two categories. Available Users contains the complete staff list from the Staff library. Users in this list are not active in the work group. These staff members can be made active in the work group by highlighting them and selecting the Add button, moving them into the Members list. Users can add all staff members at one time by selecting the Add All button. Staff members can be removed from the active work group individually by highlighting the staff member from the Members list and selecting the Remove button, or all staff members at once using the Remove All button.
Facility Group Library

The Facility Group library allows multiple organizations to be grouped into a single facility group in order to allow specific reports to be generated across organizations. This library can only be utilized by facilities with an Enterprise setup.

**Dependencies** – None, this library can be built at any time.

* Facility Group Library (VTDB)

- **Description** – Enter the description for the facility group. Since users will select the facility group description when filtering reports, it is important to use a description that accurately describes the entry.
- **Key** – Enter an easily referenced, unique identifier to allow for easy recall of this entry. The key is unique to that library, so the key that is assigned to an item cannot be duplicated with other library entries.
- **Active** – By default, when a new library item is created, it is assigned the active status. Any item that is currently available in your facility should be set as active. Items that are no longer used may be set as inactive in order to remove them from drop-down lists throughout the system.
- **Organization Units** – Organization units are organized into two categories. Organizations not active in the selected facility group will be on the left side of the screen. These organizations can be made active in the facility group by highlighting them and selecting the > button. Users can add all organizations at one time by selecting the >> button. Organizations can be removed from the active facility group individually by highlighting the organization and selecting the < button, or all organizations at once using the << button.