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DigitalOne Reports Administration

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DigitalOne Basic Navigation

Logging In to DigitalOne

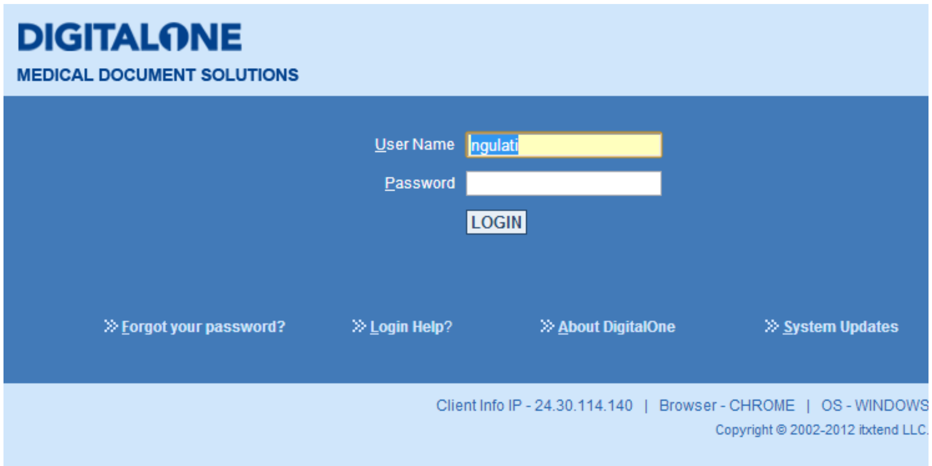
A login has been created by the DigitalOne team for your System Administrator. This login information should have already been provided to you. Please keep this information in a safe place and do not share it with anyone. Should you need additional logins for Administrative access, you can create those logins as needed.

**If for some reason you did not receive your Administrator login and password, please contact DigitalOne Support.*

To login to DigitalOne:

1. In your web browser, go to your DigitalOne Reports secure URL as specified in Item 6 of your DigitalOne Kick-Off Questionnaire. *(E.g., https://reports.myurl.com)*

2. Enter the Administrator username and password provided to you by DigitalOne in the spaces provided and select **LOGIN**.



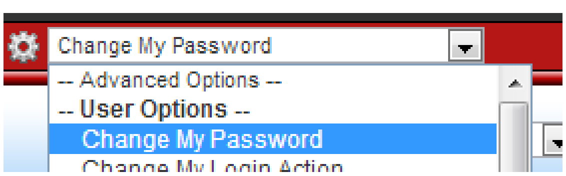
You are logged into the system and the main DigitalOne Reports dashboard is displayed. All administrative functions are performed from this dashboard and all instructions provided in this manual will be in reference to this dashboard unless otherwise specified.

Changing Your Password

The first thing all users should do after entering the system is to change their password. Typically the system will prompt new users to change their assigned password, but sometimes you may need to do this process manually as well, for either yourself or others.

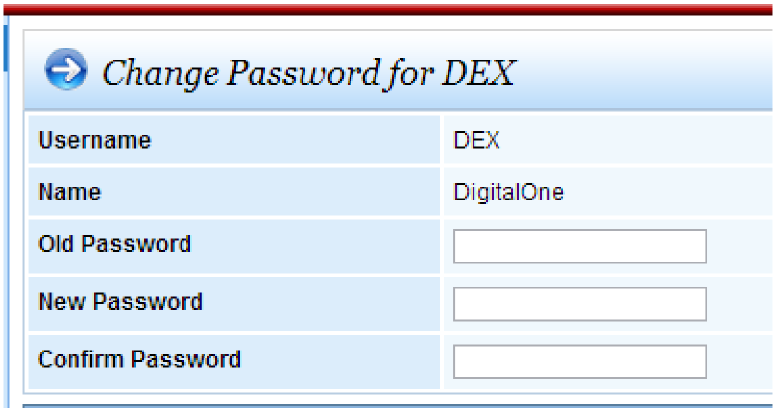
To change your current password:

1. From the *Advanced Options* menu in the top-right corner of the DigitalOne main dashboard, select **User Options** > **Change My Password**.



2. In the *Change Password for USER* screen, enter the following:
   - Old Password = Enter your current password.
   - New Password = Enter your desired password.
   - Confirm Password = Re-enter your desired password.

**Your password must contain a minimum of 6 alpha-numeric characters.*



3. Select Apply Changes.

   Your password is updated and you are logged out of the system.

4. Log back into the system with your new password.

To change another user's password:

- See Managing User Accounts & Permissions: Changing User Passwords.

Returning to the Home Screen

The Home button is located in the top right corner of the DigitalOne screen. This button will take you back to the original screen displayed when you first logged into DigitalOne.

To return to the DigitalOne home screen:

- Select **Home** from the top-right corner of your DigitalOne console.

Customizing Your Display

DigitalOne provides a choice of five different color schemes for your report console viewing.

To change the default color scheme of your dashboard:

- Select the desired color block from the *Change Theme:* color selector.

Select the **back-arrow to revert to the default color scheme at any time.*

Logging Out

Each time you close DigitalOne, you should Logout first for security reasons. Logging out will take you back to the DigitalOne login screen and you will need to reenter your DigitalOne username and password in order to re-access the system.

To logout of DigitalOne before closing your Browser/Tab:

- Select **Logout** from the top-right corner of your DigitalOne console.

Report Routing & Alerts

DigitalOne collects reports from your RIS or other Reporting System and forwards them to each Referrer's Practice for:

- Automatic import into the Referrer's EMR
- Manual import into the Referrer's EMR
- Digital Distribution to a folder on a designated computer at the Referrer's Practice, and/or
- Automatic-printing to a designated printer at the Referrer's Practice

First, reports are collected into DigitalOne from the RIS or other Reporting System through a DigitalOne virtual printer (installed on the RIS'/Reporting System's print server) or directly via HL7. Once the reports are housed in the DigitalOne repository, DigitalOne then sends digital copies of each report to the Practice(s) of the referring Physician and copied Physicians in your Referrer network.

To facilitate this process, there are a few basic steps that need to be performed to define and configure the Referring Practices to which you wish to route reports, including:

- Creation of Referrer Practices in DigitalOne
- Assignment of Physicians to each Practice
- Optional creation of users for each Practice

**New Physicians are automatically created in DigitalOne as reports are received into the system. However, you will still need to set the appropriate Report Queue for each new Physician in order to route their reports to the appropriate Practice. For this reason, it is important to build a good communication with each Practice you are installing so they alert you when Physicians need to be added to or removed from their Practice.*

Configuring User Alerts for New Reports

To send an alert when a new report is received for a specific Referrer or group of Referrers:

- Create a user account for the person to be alerted of new reports.
- In Referrer Alerts, set **Alert** to *email* (or *email – STAT only*).

Routing Additional Report Copies

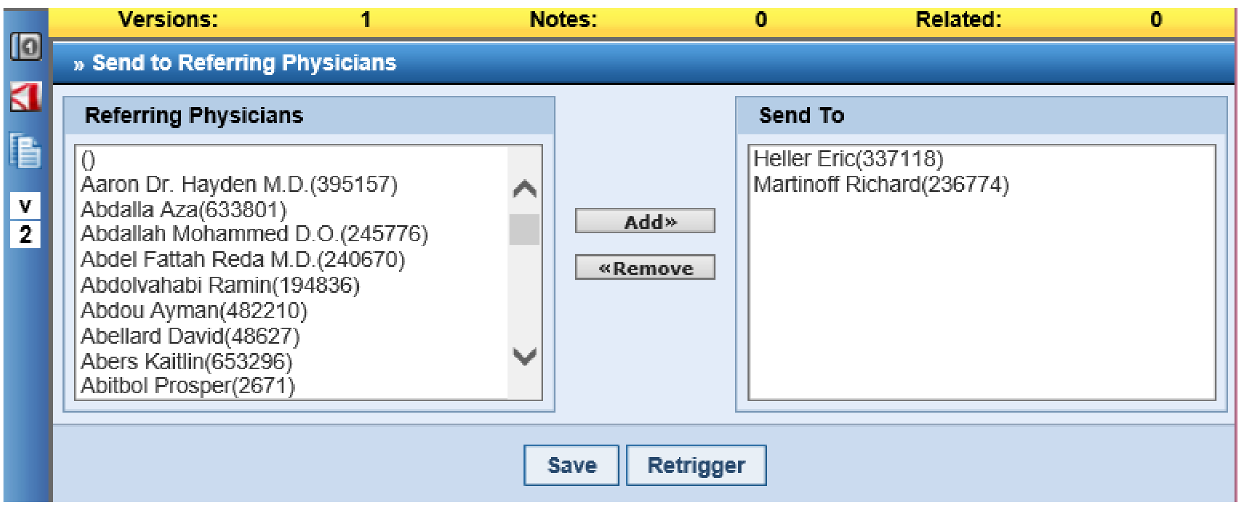
DigitalOne can be used to trigger additional report copies to Referrers/physicians in the DigitalOne database if necessary.

To send additional report copies after initial distribution:

1. View the report for which you wish to distribute additional copies.

2. In the toolbar button, select **Send to Referring Physician**. 

3. In the Right-hand pane (*Send to Referring Physicians*), the Referring Physicians to which the report has already been routed are displayed in the right column. In the left column, all additional Physicians to which the report can be routed are displayed.



4. In the left column, select the Referring Physician(s) to which you wish to send an additional copy of the report and select **Add**.

5. When you are done adding copies, select **Save**.

6. Select **Retrigger** to resend a copy of the report to all Referrers displayed in the right column.

NOTE: Retriggering report copies will also send a second copy of the report to the original report recipients as well.

Accessing Reports via the DigitalOne Portal

Users can access their reports via the portal regardless of whether or not reports are being routed to their Practice via another method or not.

To provide Referrers access to their reports via the DigitalOne portal:

- Create a user account for the person who needs online report access and include the appropriate permissions and security settings for their user type and needs.

Distributing Reports via EMR Integration or Desktop Delivery

To send reports from DigitalOne to a Referrer Practice, each of the following items must be in place:

- Create the Referrer Practice in DigitalOne
- Assign the appropriate Referrers to the Practice
- Configure the Practice Queue (which retrieves reports to be sent to the Practice)
- Contact DigitalOne Reports to have the new queue activated: support@digitalonereports.com

Practice Administration

Managing Referring Practices

DigitalOne allows fast and accurate assignment of Physician report routing queues and User report access permissions via Referring Practices. In the Referring Practice editor, you can quickly and easily:

- View a snapshot of all currently assigned Referrers and Users
- Add and remove Practice Physicians
- Add and remove Practice Users

Accessing the Referring Practice Manager

To add or edit a Practice in DigitalOne, you must first open the Referring Practice manager.

To access the Referring Practice manager:

1. From the *Advanced Options* menu in the top-right corner of the main DigitalOne dashboard, select **Admin Options** > **Manage Referrer Practice**.

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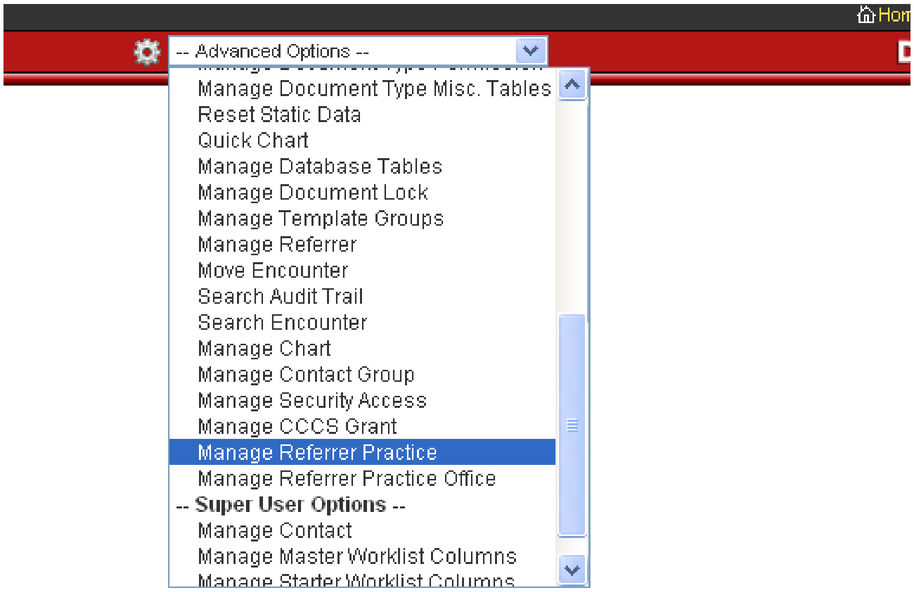
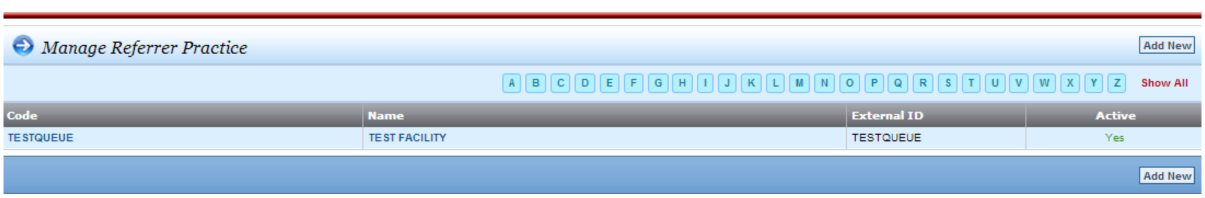


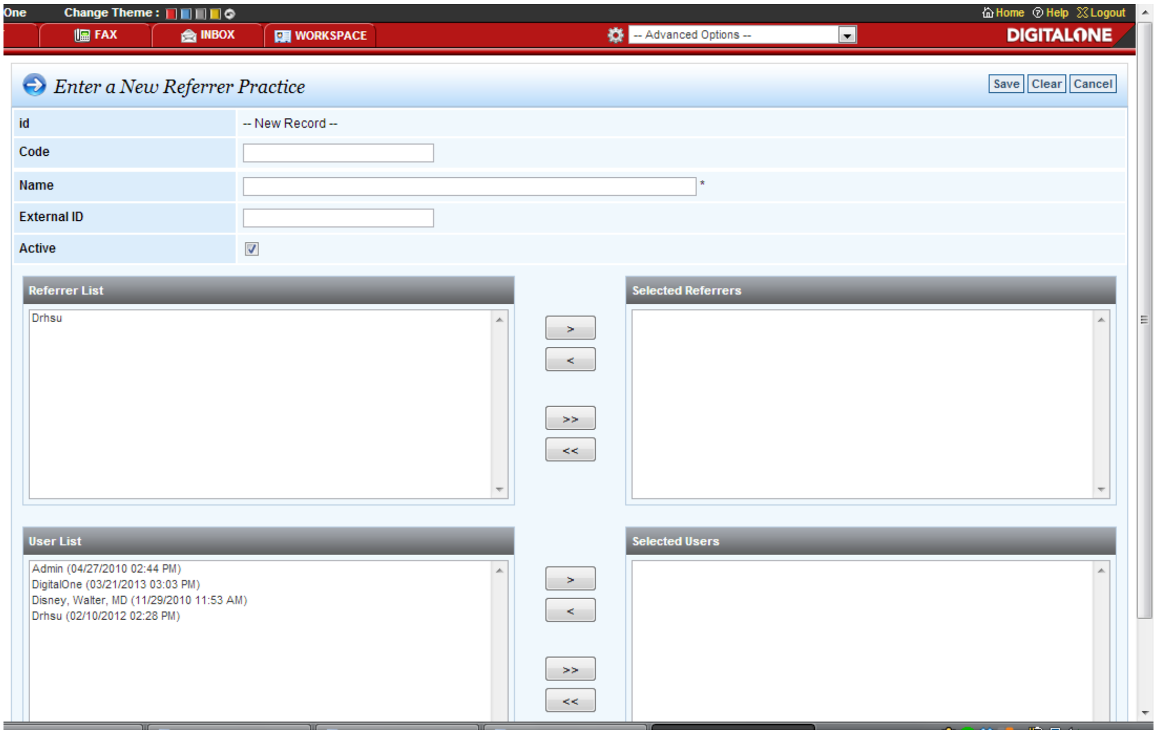
The Practice management pane is displayed.

Adding a New Referring Practice

1. From the top-right corner of the *Manage Referrer Practice* pane, select **Add New**.



The Enter a New Referrer Practice pane is displayed.



2. Enter the requested information in the following fields:

   a. ***Code***: Enter a short code for the Practice that easily identifies it (up to 30 characters). Make the code unique, as it is recommended to use this code again later when creating the unique Report Queue name for routing this Practice's reports. **Required**.

   b. ***Name***: Enter the full name of the Practice (up to 150 characters). **Required**.

   c. ***ExternalID***: If you are using an HL7 interface to send reports to DigitalOne, enter the interface code used by your RIS/Reporting System. **Optional**.

   d. ***Active***: Specify whether or not a Practice is a current Referrer and should be included in Practice selection and search lists displayed in DigitalOne.

      - ***If checked***, the Practice is Active and should be displayed in search and selection.
      - ***If unchecked,*** the Practice is Inactive and should be hidden from search and selection.

   e. ***Referrer List***: A list of all Referring MDs that can be added to the Practice.

   f. ***Selected Referrers***: A list of all Referring MDs currently assigned to the Practice.

      - Add the appropriate Referring Physicians to the Practice. For help, see [Add Referring Physicians to the Practice.]

> ***TIP***: Assigning a Referrer to a Practice does not automatically turn on or off report routing for that Physician.

g. ***User List***: A list of all DigitalOne users that can be assigned to the Practice.

h. ***Selected users***: A list of all DigitalOne users currently assigned to the Practice.

- Add the appropriate Users to the Practice. For help, see Adding Users to a Practice.

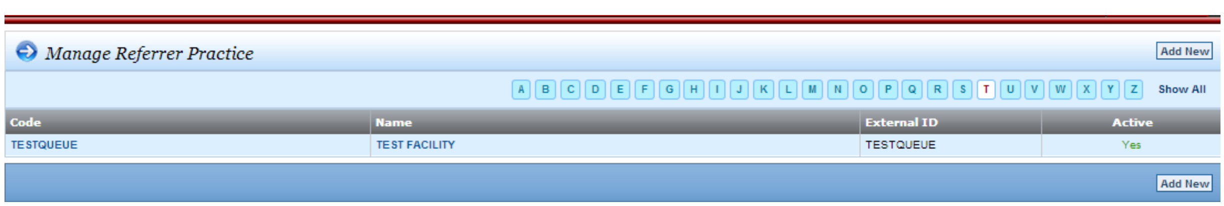
i. Select **Save**.

The Practice is saved and you are returned to the *Manage Referrer Practice* screen.

> ***TIP***: To exit the *New Referrer Practice* screen without saving changes, select **Cancel**.
>
> ***TIP***: To clear all data entered without exiting or saving, select **Clear**.

Editing a Practice

1. From *Manage Referrer Practice* pane, select the letter of the first initial of the name of the Practice you wish to edit.



A list of Practices beginning with the selected letter is displayed.

TIP: To view a list of all Practices in the system, click **Show All**.

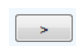
2. From the displayed list, click on the name of the Practice you wish to edit.
3. In the *Edit Referrer Practice* pane, update the *Practice information*, *Selected Referrers* and *Selected Users* as necessary. For help, see Adding a New Referring Practice.
4. Select **Save**.

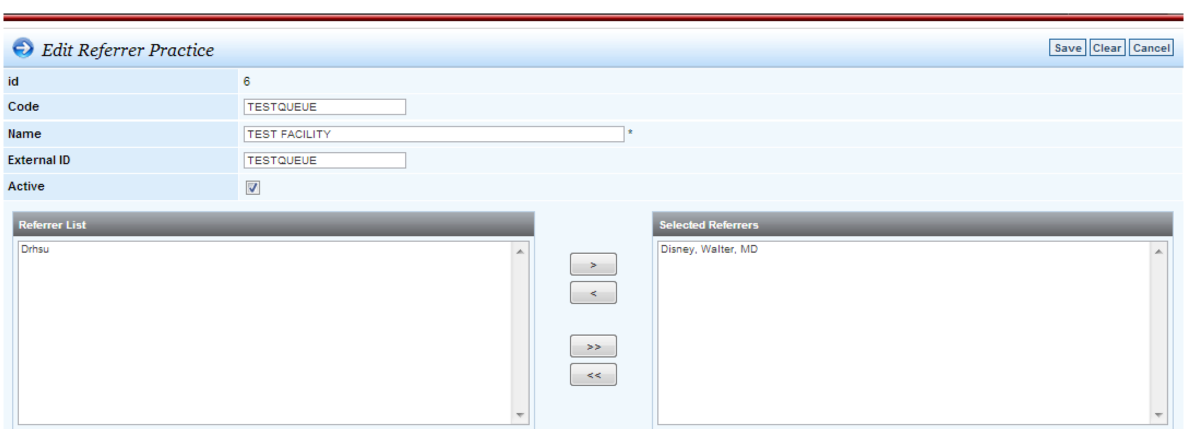
Adding and Removing Referring Physicians for a Practice

Adding Physicians to a Practice

Physician report access is based on the Physician's assignment to a Practice in the DigitalOne system.

To assign Physicians to a Practice:

1. Add or edit a Practice. For help, see Adding a New Referring Practice or Editing a Practice.
2. In the ***Referrer List*** (on left), select the desired Referring Physician and click  to add the physician to the list of ***Selected Referrers*** for the Practice (on right).



3. Repeat as necessary.

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TIP: To add ALL displayed Physicians in the ***Referrer List*** to the ***Selected Referrers*** for the current Practice, select the >> button.

4. When you are finished editing the Practice, select **Save**.

   All Practice edits are saved. The Practice is added in each Selected Referrer's account information and you are returned to the *Manage Referrer Practice* screen.

TIP: You must now enter the appropriate Report Queue settings in the Referrer's account in order for the added Referrer's reports to be sent to the report queue for the Practice. See Configuring Referrer Report Queue Settings for Added Practice Physicians.

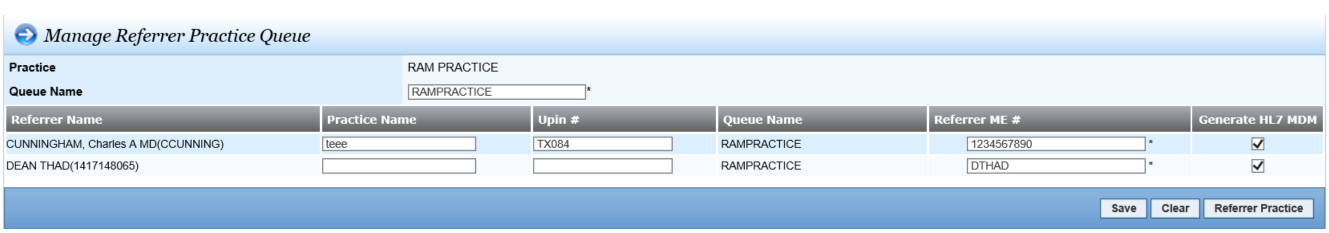
Creating a Report Queue for the Practice

After adding Referrers to a Practice, you must also update their Report Queue settings in their accounts to turn on and configure report routing. Using the *Manage Referrer Practice Queue* utility, you can quickly and easily turn on report routing and configure routing settings for all Practice Physicians simultaneously.

To manage report routing settings for the Selected Referrers for a Practice:

1. If not already open, open the Practice whose Referrers you wish to edit.
2. From the bottom left corner of the *Edit Referring Practice* pane, select **Manage Referrer Practice Queue**.

   The *Manage Referrer Practice Queue* screen is displayed.



Manage Referrer Practice Queue

Practice: RAM PRACTICE
Queue Name: RAMPRACTICE *

Referrer Name	Practice Name	Upin #	Queue Name	Referrer ME #	Generate HL7 MDM
CUNNINGHAM, Charles A MD(CCUNNING)	teee	TX084	RAMPRACTICE	1234567890 *	☑
DEAN THAD(1417148065)			RAMPRACTICE	DTHAD *	☑

Save | Clear | Referrer Practice

3. The **Queue Name** should already be entered and is configured to match the **Code** field from the *Referrer Practice* screen. Enter the Queue Name in the appropriate location on the *Referring Physician EMR and Desktop Delivery Questionnaire* forms.

Note: The queue name entered in the database MUST match the queue name entered when installing the Desktop Delivery software at the Practice site in order to properly retrieve reports at the site.

Warning: NEVER EDIT THE NAME OF A WORKING QUEUE.

4. For each Referrer listed, enter the following information:

   a. ***Practice Name:***

   - ***For Practice's with Desktop Delivery***, leave blank.
   - ***For Practice's with EMR integration***, enter the code provided by DigitalOne for the EMR interface.

   b. ***UPIN #:***

   - ***For Practice's with Desktop Delivery***, leave blank.
   - ***For Practice's with EMR integration***, enter the Physician's "[LastName], [FirstName]". (e.g., *Smith, Royce*)

   c. ***Referrer ME#***:

   - ***For Practice's with Desktop Delivery***, enter the Referrers first initial and last name with no space in between. E.g., "WDISNEY". This is the physician identifier that will be used in the file name when saving the desktop delivery PDF report to the desktop delivery computer. This helps users to identify reports correctly when searching the folder.

     Note: The ME# for each Physician within the queue must be unique. If you have two S. Smith's, you will need to include a middle initial or other identifier to distinguish between the two Physicians.

   - ***For Practice's with EMR integration***, enter the interface code for the Physician provided by the EMR vendor for their Practice, most often the Referrer's NPI. This is the code that will be used for matching the Physician to their EMR system when receiving their reports.

d. ***Generate MDM***:

- **Check** to send all new reports for this Physician to the Practice Queue.
- **Uncheck** to turn off report delivery for this Physician.

5. Select **Save** to save your changes.

   Your changes are saved and you are returned to the *Referrer Practice* screen.

> ***<u>TIP</u>***: To return to the *Referrer Practice* screen without saving changes, select **Referrer Practice.**
>
> ***<u>TIP</u>***: To clear all changes made without saving, select **Clear**.

6. **Contact DigitalOne Support to turn on (or restart) back-end routing for this queue.** You will need to provide DigitalOne the name of the queue you wish to turn-on or update.

   Once the back-end routing is started/restarted, reports will begin routing for each edited Physician according to the saved Practice Queue settings.

Removing Practice Physicians

Before removing a saved Physician from a Practice, you must first turn off report routing for that Physician to remove his/her reports from the Practice report routing queue.

To turn off routing for a saved Practice Physician:

1. Open the Practice from which you wish to remove Physicians. For help, see Managing Referring Practices: Editing a Practice.
2. From the bottom-left corner of the Referrer Practice screen, select **Manage Referrer Practice Queue**.
3. In the row(s) for the Physician(s) to remove, uncheck **Generate MDM**.
4. Select **Save**.

   Reports for the unchecked Physicians will no longer be routed to the Practice queue.

5. Continue with the instructions below.

Remove the Physician(s) from the Selected Referrers for the Practice:

1. In the ***Selected Referrers*** list (on right), select the Referring Physician you wish to remove and click  to remove the physician from the Practice.

2. Repeat as necessary.

> ***TIP***: To remove ALL Physicians from ***Selected Referrers*** list, select [<<].

3. When you are finished editing the Practice, select **Save**.

   All Practice edits are saved. The Practice association is removed from the removed Referrer's accounts and you are returned to the Manage Referring Practice screen.

Adding and Removing Users from a Practice

Adding Users to a Practice

Users assigned to a Practice can by default view reports for all Referring Physicians assigned to that Practice. However, additional user security can be defined to restrict Practice users to seeing only specific Physicians' reports. For more information about restricting report access by Physician, see Managing User Accounts and Permissions: Adding a New User.

To assign Users to a Practice:

1. In the ***User List*** field (on left), select the desired User and click [>] to add the user to the list of ***Selected Users*** for the Practice (on right).

   On Save, added users will be able to see reports for all Practice Physicians except where additional report restrictions have been defined in the User's Account Permissions.

2. Repeat as necessary.

> ***TIP***: To add ALL displayed Users in the ***Users List*** to the ***Selected Users*** for the current Practice, select the [>>] button.

3. When you are finished editing the Practice, select **Save**.

Remove Users from a Practice

To remove a User from a Practice:

1. Add or edit a Practice. For help, see Adding a New Referring Practice or Editing a Practice.

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2. In the ***Selected Users*** list (on right), select the User you wish to remove and click  to remove the user from the Practice.

   On Save, only Users in the ***Selected Users*** list will have access to Practice Reports by default.

3. Repeat as necessary.

> ***TIP***: To remove ALL Users from ***Selected Users*** list, select .

4. When you are finished editing the Practice, select **Save**.

Referrer Administration

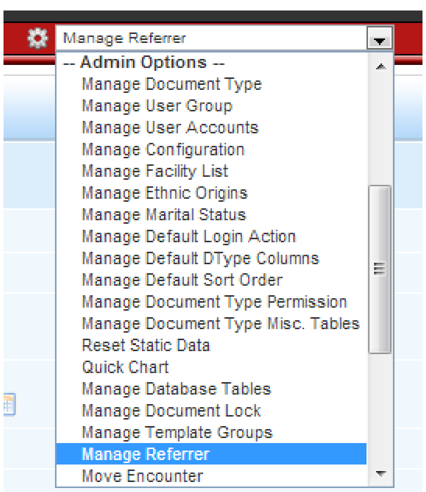
Referring Physicians are automatically added to the DigitalOne database as reports are received on which they are included as either the Referring Physician or listed to receive a report copy. However, you can also manually add and edit Referrers if desired.

Accessing the Referrer Manager

To manually add or edit Referrers in DigitalOne, you must first open the Referrer manager.

To access the Referrer manager:

1. From *Advanced Options* menu, select **Admin Options** > **Manage Referrer**.

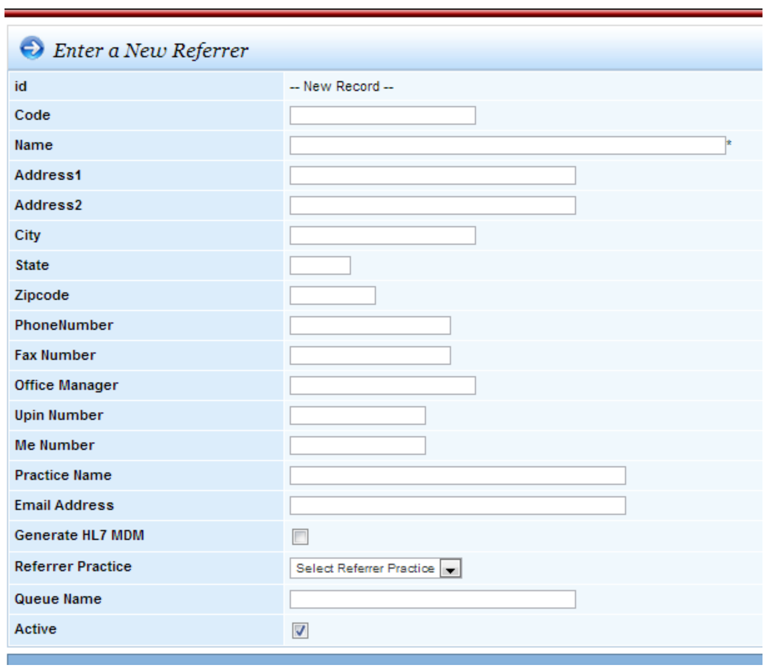


The Manager Referrer selection screen is displayed.

Adding a New Referring Physician (Manually)

1. From the top-right corner of the *Manage Referrer* pane, select **Add New**.

The *Enter a New Referrer* pane is displayed.



2. Enter the requested information in the following fields:

   a. ***Code***: Enter the Referrer's external interface code from the RIS (or whatever field will be sent to DigitalOne from the RIS either via HL7 report messages or via the report templates). Data entered is alpha-numeric up to 30 characters and must be unique for each Referring Physician. **Required**.

   b. ***Name***: Enter the full name of the Referring Physician (up to 150 characters) as displayed in the RIS/Reporting System. **Required**.

   c. ***Address/City/State/Zip***: Enter the contact address for the Referring Physician. (Optional.)

   d. ***Phone Number/Fax Number***: Enter the phone and fax for the Physician. (Optional.)

   e. ***Office Manager***: Enter the name of the administrative contact at the Physician's office. (Optional.)

   f. ***Upin Number***: Enter the Physician's UPIN number. (Optional.)

   g. ***Me Number***:

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- ***If the Physician belongs to a practice with Desktop Delivery***: Enter the Physician's first initial and last name with no spaces. (E.g., "WDISNEY") This string will be included in the name of each report file saved in their Desktop Delivery download folder so that users can easily identify the Referrer for each patient report.
- ***If the Physician belongs to a practice with EMR integration***: Enter the Referrer's NPI (National Physician Index) number or whatever data the EMR vendor is using as their interface code for the Physician.

h. ***Practice Name***: Leave blank.

i. ***Email Address***: Enter the email address to which the Physician wishes to receive email alerts. If the Physician does NOT wish to receive email alerts of new reports, leave blank. (Optional.)

j. ***Generate HL7 MDM***:

- **Check** this box if you wish to route reports for this Physician.
- **Uncheck** this box if you wish to turn OFF routing of reports for this Physician.

k. ***Referring Practice***: Select the primary Practice to which the Physician belongs. The Physician will be added to the ***Selected Referrers*** for the Practice for easy report routing editing from within the *Referring Practice* editor.

l. ***Queue Name***: Enter the queue name specified for the Practice to which you wish to route reports for this physician.

> ***TIP***: To eliminate potential errors and routing failures, it is recommended to add physicians to each Practice queue via the **Manage Referring Practice Queue** function in the *Referring Practice* editor, rather than attempting to type the appropriate queue name in manually. For help, see Configuring Referrer Report Queue Settings.

m. ***Active***:

- **Check** this box if the Physician is an active Physician in your network.
- **Uncheck** this box to deactivate this Physician from all selection menus in DigitalOne and stop report routing for the Physician.

3. Select **Save**.

The Physician is saved to the DigitalOne database and will now be included anywhere Referring Physicians are selectable in the system, including Physician Search, lists, etc.

Editing a Referring Physician

1. From the *Manage Referrer* pane, select the letter of the first initial of the name of the Referring Physician you wish to edit.

A list of Referrers whose name (as entered in DigitalOne) begins with the selected letter is displayed.

TIP: To view a list of all Practices in the system, click **Show All**.

2. From the displayed list, click on the name of the Referrer you wish to edit.
3. In the *Edit Referrer* pane, update the Referrer information as necessary. For help, see Adding a New Referring Physician (Manually).
4. Select **Save**.

User Account Administration & Security

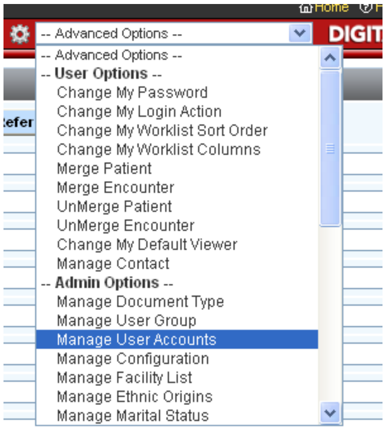
Any user who wishes to search for or access reports directly in DigitalOne must have a User account. Likewise, users wishing to receive alerts of newly approved reports for them must also have a User account.

Accessing the User Account Manager

To add or edit a user in DigitalOne, you must first open the User Account manager.

To access the User Account Manager:

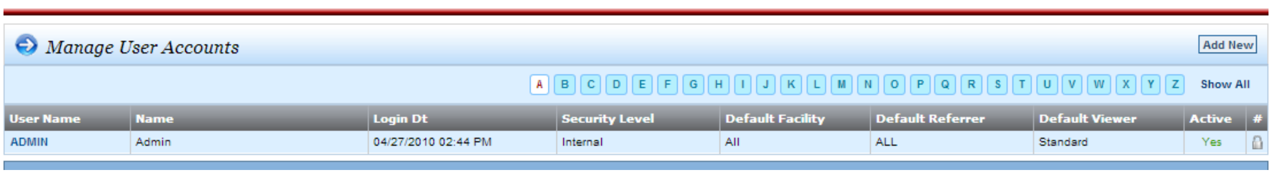
1. From the Advanced Options menu in the top-right corner of the main DigitalOne dashboard, select **Admin Options** > **Manage User Accounts.**



The *Manage User Accounts* pane is displayed.

Adding a New User

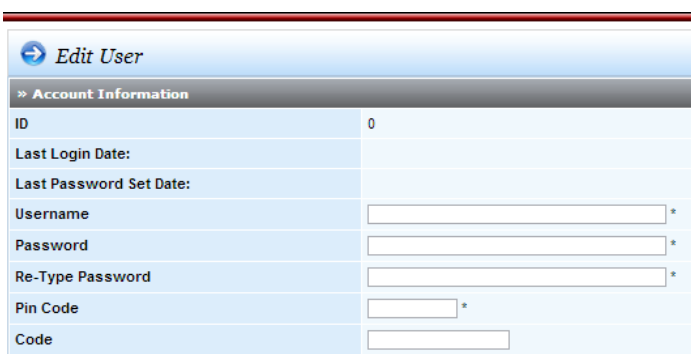
1. From the top-right corner of the *Manage User Accounts* pane, select **Add New**.



The *Enter a New User* pane is displayed.

<u>*User Account Information*</u>

2. In *Account Information*, enter the requested information in the following fields:



   a. ***Username***: Enter the desired login username for the new user. Usernames are case sensitive and cannot contain spaces. **Required**.

   b. ***Password***: Enter the default password you will provide the user for the first time they login. (E.g., "changeme") Users will then change their password on their first login. **Required**.

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** Passwords can be any alpha-numeric sequence of at least 6 characters.*

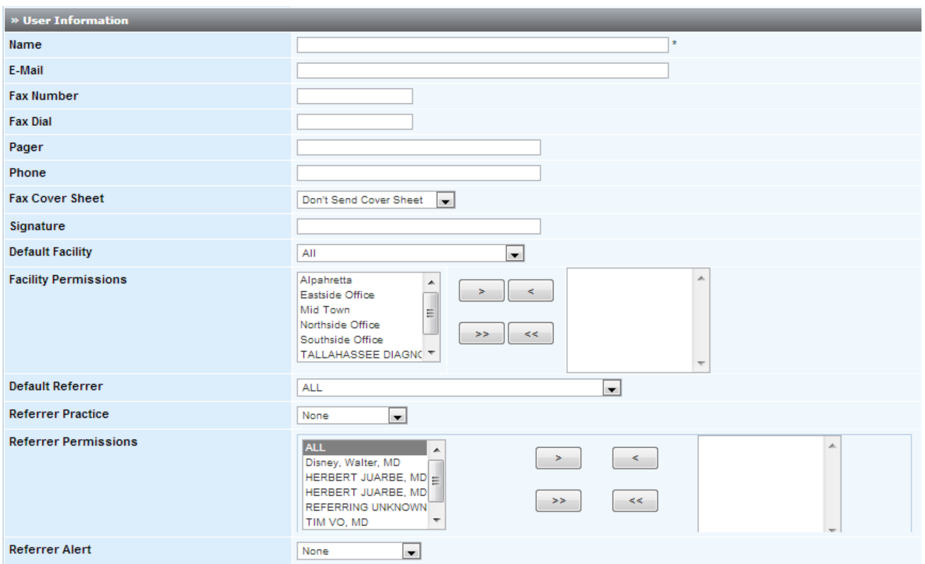
c. ***Re*-Type password:** Re-enter the default password to confirm the password sequence.

d. ***Pin Code:*** Always enter '1111'.

e. ***Code:*** Enter a short code that can be used to uniquely identify the user when displayed in DigitalOne. Can be the same as the Username.

<u>User Information</u>

3. In *User Information*, enter the requested information in the following fields:



a. ***Name***: Enter the user's full name as you wish for it to appear in DigitalOne displays, including lists and audit trails. **Required**.

**Note: The Name field is the field used for sorting and filtering Users in the User Account manager.*

b. ***E-mail***: Enter the email address for report alerts for this user. (Optional.)

> ***NOTE***: If the user is from a Referring Practice and would like to be alerted when there are new reports for them to view, enter their email in this field.

c. ***Fax Number/Fax Dial***: Leave blank.

d. ***Pager/Phone:*** Enter the user's pager and phone numbers. (Optional.)

e. ***Fax Cover Sheet:*** Leave as default.

f. ***Signature:*** Leave blank.

g. ***Default Facility***:

- ***For internal users (Employees):*** Select a Facility to grant user access to that Facility's reports.
- ***For external users (Referrers):*** Leave as 'All'.

h. Facility Permissions: Used to restrict facility search criteria when searching for reports.

- ***For internal users (Employees):*** Add all Facilities for which the user will require report access.

  To add permissions to Facilities:

  - Highlight the facilities desired on LEFT and select > to add permissions.

  To remove permissions to Facilities:

  - Highlight the facilities to remove on RIGHT and select < to remove permissions.

  TIP: To add permissions for all displayed Facilities on LEFT, select the >> button. To remove permissions for all displayed Facilities on RIGHT, select <<.

- ***For external users (Referrers):*** Leave blank.

i. Default Referrer: Allows the user access to all reports for a particular Referrer.

**For Referring Physicians, Referrer Assistants and Administrative Support.*

- ***For internal users (Employees):*** Leave blank.
- ***For external users (Referrers):*** Select default MD whose reports user will be viewing.

j. ***Referrer Practice:*** Selecting a Referrer Practice grants user access to all Physicians' reports for that Practice.

- ***For internal users (Employees):*** Leave blank.
- ***For external users (Referrers):*** Select the Practice (if any) whose reports user should be able to search and access for all Practice Physicians.

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TIP: To add report permissions by Referring Physician rather than the entire Referring Practice, use the Referrer Permissions setting (see below).

k. ***Referrer Permissions:*** Used to allow users to view reports for specific Physicians.

- ***For external users (Referrers):*** Add all Physicians whose reports the user will require access.

To add permissions to a Physician's reports:

- Highlight the Physician desired on LEFT and select > to add permissions.

To remove permissions to a Physician's reports:

- Highlight the Physician to remove on RIGHT and select < to remove permissions.

TIP: To add permissions for all displayed Physicians on LEFT, select the >> button. To remove permissions for all displayed Physicians on RIGHT, select <<.

NOTE: When combining Referrer and Practice Permissions settings, remember that DigitalOne will limit user report access to the most restrictive settings selected. So Default Referrer and Referrer Permissions will override Default Practice.

l. ***Referrer Alert:*** Select the type of alert (if any) the user wishes to receive when they have new reports to view. New reports include all reports for the selected Practice and Physicians.

- ***None:*** No alerts.
- ***Email:*** Send new report notification to email address specified above.

- ***Fax:*** Do not select. Not available in Report Distribution only product.
- ***Pager:*** Do not select. Not available in Report Distribution only product.
- ***Email – STAT Only:*** Send new report notifications to email address specified above **for STAT reports only.**

> ***NOTE***: Turning on Email alerts for the current user also automatically turns on email alerts to the Email field in all selected Referrer(s)' accounts specified in the Default Referrer, Default Practice and Referrer Permissions as described above. To trouble-shoot email alerts, look at both the USER account email address/alert setting and Referrer(s) selected ***and*** also at the REFERRERER email address (in Manage Referrers) for the Practice and Referrer permissions granted.

Inbox Preferences

4. In Inbox Preferences, enter the requested information in the following fields:

» Inbox Preference	
Alert On New	No alerts please
Max Duration Allowed	Disable
Reminder	No alerts please

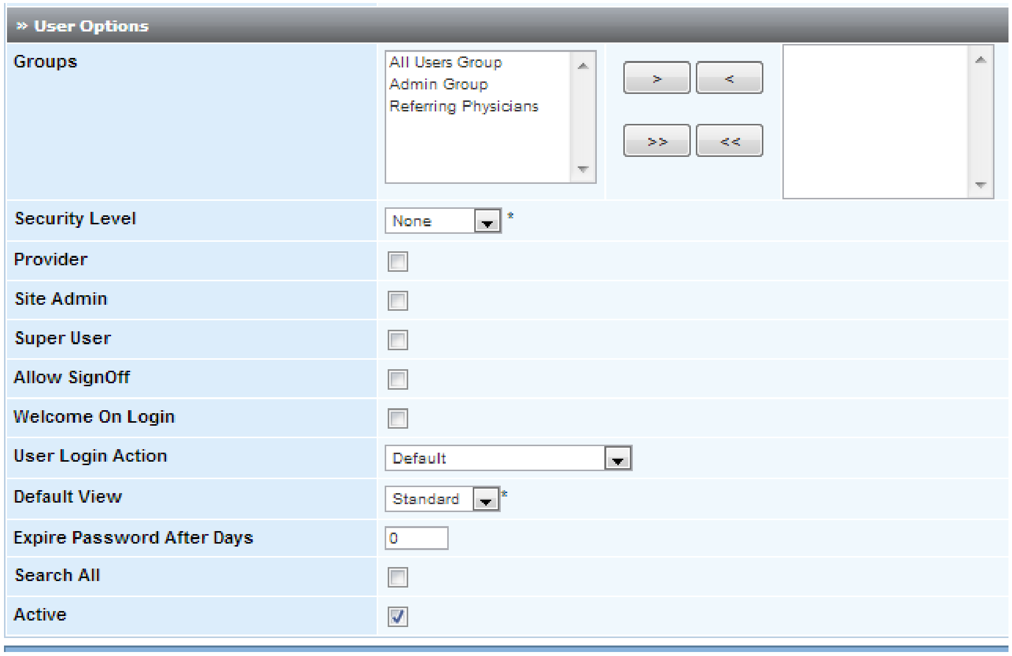
   a. ***Alert on New***: Leave as default, "No alerts please".

   b. ***Max Duration Allowed:*** Leave blank.

   c. ***Reminder***: Leave as default, "No alerts please".

User Options

5. In *User Options*, enter the requested information in the following fields:



a. ***Groups:*** Select the appropriate User Group(s) based on the User's role.

- ***All Users Group:*** All users are automatically added to this group. Includes basic permissions for system operation. **For all users**.
- ***Referring Physicians*:** Allows user access to search and view only reports to their specified Referring Practice and/or Referring Physicians. **For external users.**

b. Security Level:

- ***Internal:*** Allows user to search for and view reports for the facilities specified in the *Default Facility* and *Facility Permissions* fields. **Employees only**.
- ***External:*** Allows user to search for and view only reports for their patients as specified in the *Default Referrer*, *Referrer Practice* and *Referrer Permissions* fields. **Referring MDs and Referrer Practice Users only**.

c. ***Provider:*** Leave blank.

d. ***Site Admin:*** Gives user access to Administrator Options in the **Advanced Options** menu, such as managing Practices and Referrers. **For DigitalOne System Administrators Only**.

e. ***Super user:*** Leave blank.

f. ***Allow Signoff:*** Leave blank.

g. ***Welcome on Login***: Leave blank.

h. ***User Login Action***: Leave blank.

i. ***Default View***: Leave as default: “Standard”.

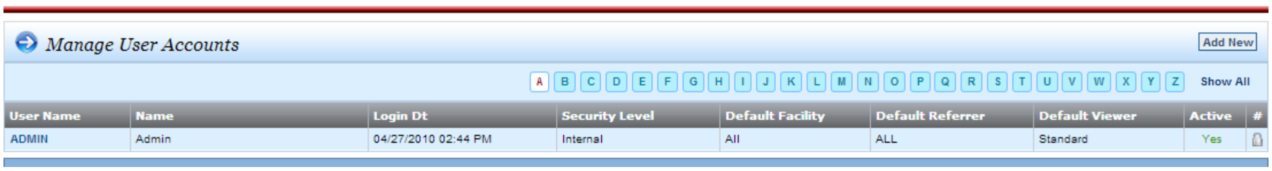
j. ***Expire Password After Days***: Leave as 0.

k. ***Search All***: Select to allow user to search across all facilities and Physicians. (E.g., Oncologists can search for old studies.)

l. ***Active***: Select to allow user to login to DigitalOne. Deselect to remove access to DigitalOne.

Editing Users

1. From the *Manage User Accounts* pane, select the letter of the first initial of the name of the User you wish to edit.



A list of Users whose Name begins with the selected letter is displayed.

NOTE: Name is displayed exactly as entered in the Name field in *User Information* in the user’s DigitalOne account.

TIP: To view a list of all Users in the system, click **Show All**.

2. From the displayed list, click on the name of the User you wish to edit.

3. In the *Edit User* pane, update the user’s information as necessary. For help, see [Adding a New User](#).

4. Select **Save**.

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Unlocking a Locked User Account

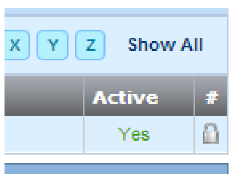
Sometimes you will need to change a user's password for them. (E.g., If a User forgets their password.)

Manually change a user's password:

1. From the *Manage User Accounts* pane, click on the first letter of the Name of the User whose password you wish to edit.

   **Do <u>NOT</u> open the user.*

2. In the displayed list, find the User whose password you wish to reset and click on the Lock symbol on the right side of the row displayed for the User.

3. In the pop-up window, enter a new password for the user and confirm.

   ** Passwords can be any alpha-numeric sequence of at least 6 characters.*

4. Select **Apply Changes**.

   The User's password has been changed and they can now login to the system with their new temporary password.

Make sure the user's account is active:

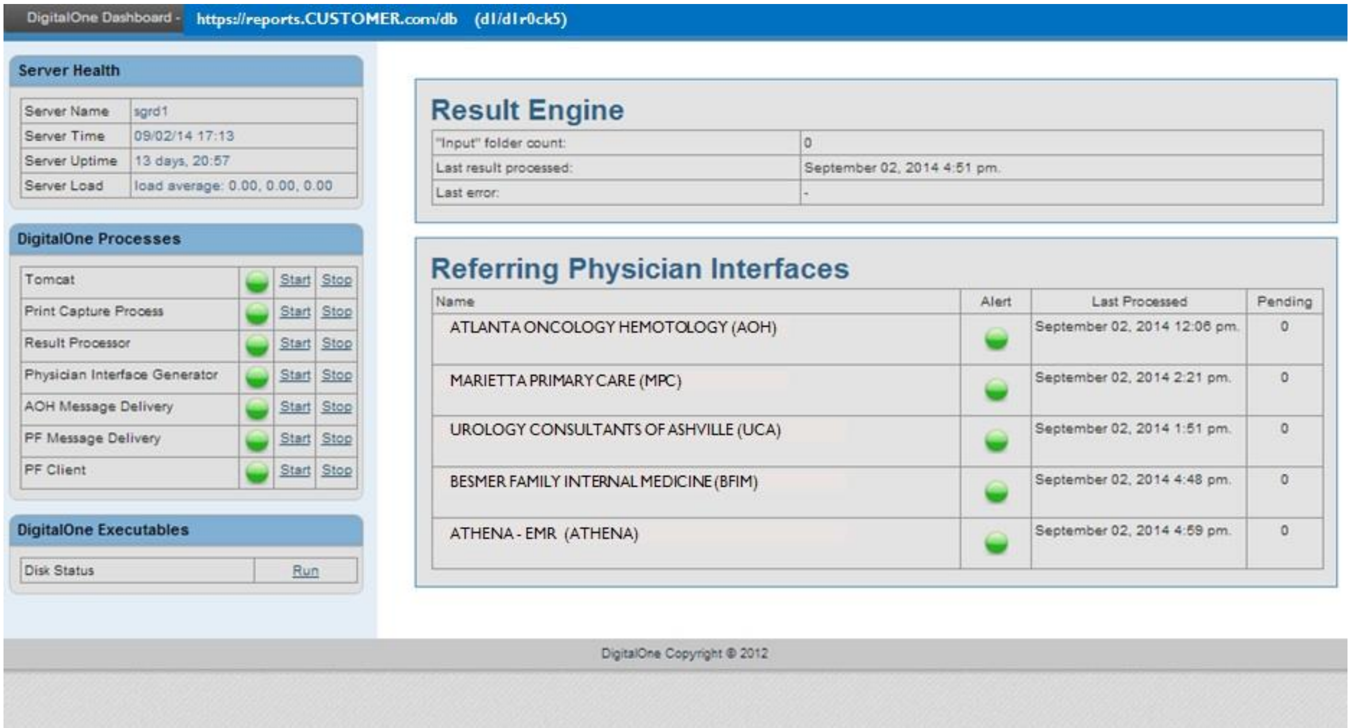
1. Click on the username of the locked user.
2. Scroll down and check **Active**.
3. **Save**.

Provide the user their new temporary password and ask them to login through the portal on first access and **Change My Password** from the **Advanced Options** menu.

System and Interface Monitoring

DigitalOne provides an administrative dashboard that allows you to monitor all of your Desktop Delivery and EMR Practice Queues to make sure they are up and running.

This dashboard is located at: https://reports.myurl.com/db   Username/password: d1/d1r0ck5



The left column displays the server processes.

The right column displays your EMR and Desktop Delivery queues.

All processes should consistently display green. Red indicates a stopped process or error.

Note: You will not be able to stop or start processes from the dashboard monitor. The ability to start and stop server processes is strictly controlled by DigitalOne.

Trouble-shooting

Reports are routing to a Practice for a Physician not in Selected Referrers

Remove Report Queue Settings for a Specific Referrer

Although you can easily remove Referrers from a Practice using the Practice manager screen, forgetting to turn off the Generate MDM setting before removing the Physician from the Practice will mean their reports will continue to route even though they are not displayed in the ***Selected Referrers*** list for the Practice.

To manually remove a Referrer from a queue after they've already been removed from the Practice:

1. From the *Manage Referrer* pane, select the Referrer you wish to edit. For help, see Editing a Referring Physician.

2. In **Report Queue**: Delete the report queue listed and leave the Report Queue field blank.
3. Uncheck the **Generate MDM** checkbox.
4. Select **Save**.

Reports for the Referrer will no longer be routed until the Referrer is re-assigned to a new Practice and their report settings are updated with the new queue information.