Main Navigation Panel: Clinical Badges

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Version 20.0

Overview

Badges in the Main Navigation Panel (also known as 'Alert Bar') represent the number of outstanding items as they relate to the specific areas in OP. The Clinical Group badges are specifically calculated to be meaningful to the Rendering Provider who is logged in. Although the Clinical Group does not calculate badges for non-providers, with the exception of *Documents*, the Clinical Work window can still be accessed from here. Once the Clinical Work window is opened, the badges are calculated according to the scope. The items listed in the Clinical Group of the Main Navigation Panel are visible based on the permissions of the logged in user.

The badges in the Clinical Group are updated every 120 seconds. If an updated badge count is needed before the automatic refresh occurs, the user can right-click in the Navigation Panel and click **Refresh Badges**. The permission needed to see this group in the Main Navigation Panel is **F8_Chart**. Badges in the Clinical Group are calculated based on the logic below.

> **Note**: The logic below explains how the badges are calculated and should *not* assume there is not other outstanding work outside of the parameters of the badges. Once the **Clinical Work window** is accessed by clicking the items in the Clinical group, the scope at the top of the window may be changed. Changing of the scope is useful and necessary in situations such as covering for another provider or cleaning up unfinished clinical work at the end of the day.

Encounters

Any Encounter Note written by the logged-in Rendering Provider in the last 30 days that is unfinalized, including EFR. The count will be displayed for any Encounter that the Rendering Provider

has claimed as theirs by either opening the note and saving at least once, or if someone on the practice team has entered the Rendering Provider in the patient Visit Information section of the note. This count is never red. The permission needed to see this item in the Main Nav Panel is **F8_Peds_PE_btn**.

- The user will see all of their unfinalized encounter notes regardless of the location for which the note is attached. Notes for which the logged in provider is a cosigner are not part of this calculation. To review notes that require a cosigner, click Encounters. The notes requiring cosigner are included in the count in the Clinical Work window (Encounters tab).

Well Visits

Any Well Visit Note written by the logged-in Rendering Provider in the last 30 days that is unfinalized, including EFR. The count will be displayed for any Well Visit that the Rendering Provider has claimed as theirs by either opening the note and saving at least once, or if someone on the practice team has entered the Rendering Provider in the patient Visit Information section of the note. This count is never red. The permission needed to see this item in the Main Nav Panel is **F8_Peds_PEx_btn**.

- The user will see all of their unfinalized well visit notes regardless of the location for which the note is attached. Notes for which the logged in provider is a cosigner are not part of this calculation. To review notes that require a cosigner, click Well Visits. The notes requiring cosigner are included in the count in the Clinical Work window (Well Visit tab).

Received

This is the number of Diagnostic Tests ordered by the logged-in Rendering Provider with results received but not reviewed or finalized/completed within 30 days, including EFR. When using this tab to open the Clinical Work window, the system automatically defaults to *received* diagnostic tests only to reflect where you were on the alert bar. This is even if the user has memorized "both" as a preference. When navigating from the alert bar, the default will reflect the Received tab information. This count is never red.The permission needed to see this item in the Main Nav Panel is **F8_DiagnosticTests**.

- The user will see their diagnostic tests regardless of location.

Reviewed

This is the number of Diagnostic Tests ordered by the logged-in Rendering Provider with results that

were reviewed but not finalized/completed within 30 days, including EFR. When using this tab to open the Clinical Work window, the system automatically defaults to *reviewed* diagnostic tests only to reflect where you were on the alert bar. This is even if the user has memorized "both" as a preference. When navigating from the alert bar, the default will reflect the Reviewed tab information. This count is never red. The permission needed to see this item in the Main Nav Panel is **F8_DiagnosticTests**.

- The user will see their diagnostic tests regardless of location.

Failed

This is the number of all failed labs where results were sent from the lab but the file is not processed for reasons such as an HL7 issue with the file. The permission needed to see this item in the Main Nav Panel is **DTI_UnmatchedResults**.

- The user will see their failed results regardless of location.

Referrals

This has a count for the logged-in Rendering Provider and has a look-back period of 180 days. The count reflects any referrals ordered by the Rendering Provider that are past their referral flag date. This count is never red. The permission needed to see this item in the Main Nav Panel is **F8_Referrals**.

- The user will see referrals they have written regardless of location.

Documents

This has a count for each logged-in user (not just Rendering Providers). The count reflects any documents addressed to the logged-in user that have been created or scanned in the last 30 days that have not been reviewed. This count is never red. The permission needed to see this item in the Main Nav Panel is **Scanned_Items_View**.

- The user will see documents addressed to them regardless of location.

Surveys

This has a count for the logged-in Rendering Provider and has a look-back period of 30 days. The

count reflects any surveys ordered by the Rendering Provider that were completed by the patient/family and received by the practice but not yet reviewed. For standing orders on templates, these are assigned based on the schedule column of the Rendering Provider who is expected to host the appointment. **Note**: If a patient moves an appointment to a different provider and the survey has already been completed, the Rendering Provider will not be reassigned. This count is never red. The permission needed to see this item in the Main Nav Panel is **F8_Surveys_btn**.

- The user will see all of their incomplete surveys regardless of location.

e-Prescribe

This counts any prescriptions written in the last 7 days with a failed status or ones that were added in the last 30 minutes but not retrieved by the pharmacy. This count is always red. The permission needed to see this item in the Main Nav Panel is **Prescriptions_ERx_Center**.

- The user will see all of their failed prescriptions regardless of location.

Refill Requests

This has a rolled up count for all incoming refill and change requests for any prescriber in the practice and will be visible to all prescribing providers with a look-back period of 7 days. The count is displayed with two values: open requests for the logged-in provider/total count. For example: 2/14 indicates the logged-in provider has 2 open refill requests out of 14 totals. There is no concept of locations to the pharmacy, and the original prescription may have not been written by a current provider in the practice. Therefore, the second value is an aggregate count for the practice. This will never be red. The permission needed to see this item in the Main Nav Panel is **Prescriptions_ERx_Center**.