SRS Occupational Health Services

Electronic Medical Business Operations System (EMBOS®)

EMBOS® User Manual

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EMBOS Basics

The Electronic Medical Business Operations System (EMBOS) is a state-of-the-art, web-based electronic medical records (EMR) system. It captures all patient data and the medical workflow, giving the medical provider a knowledge-based tool to support the health assessment process.

EMBOS is a comprehensive system providing the following features:

- Easy-to-use interface that reflects provider and support staff real-world workflows.
- On-line patient questionnaires that enable pre-appointment updating of medical histories.
- Patient scheduling and auto-scheduling of recurring exams with automated pre-appointment notifications and single-click patient registration.
- Automated interfaces to lab devices and digital imaging systems.
- Easy navigation to patient electronic health record summaries with drill-down functionality.
- Support of psychological evaluation with results imported from standard psychological tools.
- Real-time entry of clinical notes in easy-to-use exam forms.
- Roll-based function and data access, ensuring maximum security of patient health information.

Terminology

EMBOS uses specific terminology that is important to understand before starting to use EMBOS.

Activity: High level medically-related action or condition that is relevant to a healthcare facility (e.g., the reason for clinical services being rendered).

Procedure: Fundamental medical activity performed by a healthcare provider on or for their patients and for which results are recorded.

Case: An instance or occurrence of an *activity* that occurs to a patient, i.e., the reason for the patient visit. A case usually has a short life span, i.e., it begins and ends during a single visit. However, a case can extend over multiple days, weeks, or even years.

Service: An instance or occurrence of a *procedure* that is performed on or for a patient by a provider. Unlike *cases*, there are only a few *services* that can extend over multiple visits (e.g., Health Assessment, Physicians' Exam, and Psychological Evaluation).

Registration: An association between a patient and SRS Medical for the purpose of providing medical services. A Registration occurs at a discrete point in time within a given day, usually when a patient checks in for an appointment.

There are two types of registration:

- *Visit Registration:* Occurs when a patient visits the medical facility.
- *Non-Visit Registration:* Occurs when services are provided for a patient who is not physically present at the medical facility, e.g., a phone conversation with the patient.

Registering Cases: The process of associating a *case* with a *registration*. Cases are registered in the EMBOS Registration module.

Registering Services: The process of associating a *service* with a *registration*. Services are registered in the EMBOS Workstation modules.

Appointment: The process of scheduling a patient visit to the medical facility on a date and time in the future. An *appointment* can be thought of as a scheduled *Visit Registration* that occurs in the future.

Scheduling Cases: The process of associating a *case* with an *appointment*.

EMBOS Home Page

The EMBOS home page consists of a menu bar and an entry field for quickly locating a patient's electronic medical record.

The menu bar contains icons that provide multiple options from which you can select. For example, if you click the Scheduling icon, you may select any of the four options displayed.

You can also quickly find a patient's electronic medical record from the home page by entering either the patient's User ID or Social Security number in the open field in the top right corner and then clicking the *Open Patient EMR* icon.

Enter User ID or SSN:

EMBOS Navigation

EMBOS uses two types of windows – modeless and modal. The type of window affects how you navigate in EMBOS.

- *Modeless windows* allow multiple windows to be open at the same time, and you can navigate freely between any open modeless windows.
- *Modal windows* must be dispensed with before navigating away from them. EMBOS typically opens a modal window from a modeless window, referred to as the parent window. A typical modal window is a maintenance form (add, edit, delete).

To exit from the EMBOS system, use the *Sign Out* button on the menu bar from the EMBOS home page.

Do **not** use the X in the upper right corner of a window to close it. Always use the *Close* button.

Patient Search

One common task throughout EMBOS is to search for a patient using the *Person Select Form*. For example, when scheduling an appointment, you are asked to enter the patient's User ID or Social Security Number (SSN). If you know the User ID or SSN, enter it and click on the *Search* button. If you enter the SSN, do *not* include dashes. If you do not know the User ID or SSN, leave that field blank and just click the *Search* button.

The Search window gives you several criteria on which to search. In the example below, the *Last Name* field is used to search, followed by the results of the search, which provide both the User ID and SSN.

Rec #	Name	User ID	SSN	Patient ID	Birth Date	Organization
1	Demo, Mary Two	Y1102	201-10-9092	11144	07/04/1976	
2	Demo, Will One	Y2011	201-10-9091	11141	07/04/1976	

You can then select the correct record and click *OK*, and the patient's User ID will automatically be placed in the Appointment form. For more detailed information on using the Patient Search Form, see the *Open Patient* section in the *Patient Record* chapter.

List Functionality

The way you select items from a list depends on whether or not a toolbar is displayed. If there is a toolbar, simply click a single item in the list to select it and then click on an icon on the toolbar, depending on what action you want to perform.

Registered Patients on: Thursday, October 06, 2011

Status	Source	Reg Time	Check-Out	User ID	Patient
Registered	Visit	1:52 PM	2:16 PM	D1001	Demo, Edna L
Registered	Visit	2:14 PM		J0915	Demo, Joseph W
Programs: - Beryllium Sensitized Worker Program - HRP - Human Reliability Program - Wellness Program					

Multiple items can be selected (or deselected) by checking the box in the column labeled *Select*.

Duty Restrictions

Select	Mode	Type	Source	Description
☐	CF	Temp	Health Evaluation	No Respirator Use
☐	CF	Temp	Other	No Running Or Participation In Security Exercises
Restriction modifiers for 'Carried Forward' restrictions cannot be changed, because doing so would constitute a new restriction. The 'old' restriction should be ended and a new restriction created.				
☐	CF	Temp	Non-Occ Illness	Minimize Use Of Stairs
This is restriction modifier #1. The modifier can be set on any Base Restriction; however, the modifier is used primarily with the 'Other' Base Restriction to create new restrictions that are not pre-defined as Base Restrictions.				

If there is no toolbar displayed, clicking on an item in a list will select it. In some lists, you can select multiple items by using *Ctrl-Click* or *Shift-Click*.

Electronic Medical Business Operations System (EMBOS®)
Base Restriction Select Form

Base Restrictions List

No Running Or Participation In Security Exercises
No Strenuous Pulling Or Pushing
No Use Of Arm And/Or Hand
No Use Of Ladder Over
No Work Around Open/Unguarded Machinery
No Work At Unprotected Elevation
No Work Requiring Binocular Vision
No Work Requiring Normal Color Perception
No Work Requiring Normal Corrected Hearing
No Working Alone
No Working In Confined Space
Not To Change Jobs Or Work Environment Without Prior Approval
Not To Serve On Emergency Squad
Only Part-Time Work Of Not To Exceed:
Other:
Sedentary Work Only
Work Should Be Limited To (Area):
No Work Requiring Normal Corrected Vision
No Work Requiring Normal Depth Perception

In some lists, items are selected by moving them to/from the respective list by clicking on the item and then clicking the respective arrow (> or <).

Electronic Medical Business Operations System (EMBOS®)
Diagnosis Search and Select Form

Search Criteria: fever Search

Search Results:

- 026 RAT-BITE FEVER*
- 026.0 SPIRILLARY FEVER
- 026.1 STREPTOCOCCAL FEVER
- 026.9 RAT-BITE FEVER NOS
- 034.1 SCARLET FEVER
- 060 YELLOW FEVER*
- 060.0 SYLVATIC YELLOW FEVER
- 060.1 URBAN YELLOW FEVER
- 060.9 YELLOW FEVER NOS
- 065.1 ONSK HEMORRHAGIC FEVER
- 065.3 TICK-BORNE HEM FEVER NEC
- 065.4 MOSQUITO-BORNE HEM FEVER
- 065.9 ARTHROPOD HEM FEVER NOS
- 066.0 PHLEBOTOMUS FEVER
- 066.1 TICK-BORNE FEVER
- 066.2 VENEZUELAN EQUINE FEVER
- 066.3 MOSQUITO-BORNE FEVER NEC
- 077.2 PHARYNGOCONJUNCT FEVER
- 082.0 TYPHOID FEVER
- 082.1 PARATYPHOID FEVER A
- 082.2 PARATYPHOID FEVER B
- 082.3 PARATYPHOID FEVER C
- 082.9 PARATYPHOID FEVER NOS
- 078.2 SWEATING FEVER
- 078.7 ARENAUTAL HEM FEVER
- 082.0 SPOTTED FEVERS
- 082.1 BOUTONNEUSE FEVER
- 082.2 NORTH ASIAN TICK FEVER
- 083.0 Q FEVER
- 083.1 TRENCH FEVER

Selected Diagnosis:

View Source OK Close

Menu Bars on Forms

Many EMBOS forms provide menu bars for you to perform an action on a selected patient. In the Registration menu below, a scheduled patient is selected and then the *Check-In/Register Patient* icon on the menu bar is clicked to register the patient. This action will then move the scheduled patient to the Registered Patients section. Notice that the Registered Patients section has its own menu bar with multiple icons, e.g., *Check-Out Patient*, *Delete Selected Registration*.

Scheduled Patients on: Thursday, October 06, 2011

Status	Sched Time	User ID	Patient	Case Description(s)
Scheduled	2:45 PM	Y1102	Demo, Mary T Programs: - Breast Wellness Program - Wellness Program	

Registered Patients on: Thursday, October 06, 2011

Status	Source	Reg Time	Check-Out	User ID	Patient	Case Description(s)
Registered	Visit	1:52 PM	2:16 PM	D1001	Demo, Edna L	
Registered	Visit	2:14 PM		J0915	Demo, Joseph W	

EMBOS Timeouts

EMBOS has two types of timeouts:

- ***Inactivity timeout***, which occurs after 30 minutes of inactivity. You will be prompted for your user credentials in order to continue.
- ***Session timeout***, which occurs after two hours of an EMBOS session. You may lose data from whatever form was open when the session timed out. If this happens, close your browser and then re-open it. To avoid session timeouts and lost data, don't leave maintenance (add, update, delete) forms open for long periods of time.

EMBOS Scheduling

The EMBOS Scheduling module implements functions associated with scheduling, rescheduling, and canceling a patient appointment. It can also be used to schedule cases that are associated with appointments. In the Scheduling module on the EMBOS home page, there are four types of schedules available for use: *Patient Schedule*, *Provider Schedule*, *Monthly Schedule*, and *Auto Schedule*.

Patient Schedule

The Patient Schedule allows the user to create new appointments and associated cases, edit appointments and associated cases, reschedule appointments, cancel appointments, and view the Appointment Record. For each of these actions, there is a respective icon above the Appointments list on the *Patient Schedule Home Page*.

Before creating a new appointment, it is important to know that the EMBOS application enforces the following rules for appointments:

- The appointment date and time must be in the future of the current date and time.
- An appointment in a state of rescheduled or canceled cannot be placed into another state or registered.
- An appointment that has been registered cannot be rescheduled or canceled.
- A patient can have multiple appointments in a given day.
- Appointments can be cancelled but not deleted.
- Appointments can be placed in a state of rescheduled or canceled despite the appointment date and time being in the past

Create an Appointment and Associated Cases

To begin the appointment process, use the calendar to select the date for the appointment.

Then use the *Create New Appointment* icon. You will be prompted to use the *Person Select Form* (see *Patient Search* section in *EMBOS Basics*) to locate the person for whom you are making the appointment. The patient's User ID and other pertinent information will then be placed in the top section of the *New Appointment Form*. From this form, you can select the *Facility* and change the appointment time and date. You can also select to send a confirmation email, which is automatically created and sent to the patient.

Electronic Medical Business Operations System (EMBOS®)
 New Appointment Form For Test Purposes Only

Schedule Reports

Name: Mary (First) Two (Middle) Demo (Last) **Patient Quick Links ▼ Patient ID:** 11144

Birth Date: 7/4/1976 **Age:** 35 **Gender:** Female **Race:** White **SSN:** 201-10-9092

Organization: Unknown **Home Phone:** () - - **User ID:** Y1102

Comp Job Title: **Work Phone:** () - -

Facility: SRS Occupational Health Services **Appt Date:** 11/17/2011 **Appt ID:** < new >

Status: Scheduled **Appt Time:** 11:32 AM **Schedule Method:** Medical

Confirmation Email: ☐

After the top section is completed, click the *Save* button at the bottom of the form.

The bottom of the *New Appointment Form* is used to schedule a case or cases to be associated with this appointment and to view the appointment history. A case is an instance or occurrence of an *activity* that occurs to a patient, i.e., the reason for the patient visit.

The toolbar above the Scheduled Cases list provides separate icons for each of the actions associated with scheduling a case.

To schedule a case, click the *Schedule a New Case* icon. Scheduling a new case displays a list of pre-defined medical activities to select from. Click on the plus sign to see a complete list of activities in each folder.

After selecting the pre-defined activity, EMBOS creates the new case, associates the case with the appointment, and then displays the Scheduled Case screen.

Case#	Start Date	Last Serviced	Description
124651			Acrylonitrile Exposure

Click *Save* to save the case. Multiple cases can be associated with an appointment.

Scheduling an *existing* case (with the *Schedule an Existing Case* icon) displays a list of existing cases. After selecting one of the existing cases, EMBOS associates the selected case with the appointment and then displays the Scheduled Case screen. The start date and time will be the first time the case was registered.

After you have scheduled an appointment and associated cases, you are then able to use other icons on the *Patient Schedule – Home Page*, such as opening/editing an appointment, rescheduling an appointment, and cancelling an appointment.

Reschedule an Appointment

An appointment can be rescheduled with the *Reschedule Appointment* icon. The *Reschedule Appointment Form* is used to enter the new appointment date and time and select a reason for the change (*Sick, No HRP Paperwork, No Show*, etc.). If *No Show* is selected as the reason, an automatic email is sent to the patient and the patient's supervisor. Email can be sent regarding the rescheduled appointment by use of the *Confirmation Email* option.

Electronic Medical Business Operations System (EMBOS®)
Reschedule Appointment Form For Test Purposes Only

Schedule Reports

Name: **Patient Quick Links ▼ Patient ID:**
(First) (Middle) (Last)

Birth Date: **Age:** **Gender:** **Race:** **SSN:**

Organization: **Home Phone:** **User ID:**

Comp Job Title: **Work Phone:**

Facility: **Previous Date:** **Appt ID**

Status: **Previous Time:** **Schedule Method:**

Reason: **Appt Date:** **Confirmation Email:** ☐ ☐

Appt Time:

Scheduled Cases **Appointment History**

Scheduled Case Workload for: Mary Two Demo on Thursday 11/17/2011 (Appointment) ☐

Case#	Start Date	Last Serviced	Description
123929	9/10/2011	9/10/2011	Psychological Visit
124651			Acrylonitrile Exposure

When an appointment is rescheduled, it is given a state of *Rescheduled*. In addition, a new appointment is created with existing scheduled cases and is linked to the rescheduled appointment.

Cancel an Appointment

An appointment can be canceled with the *Cancel Appointment* icon. The *Cancel Appointment Form* is used to select a reason for the cancellation (*Sick, No HRP Paperwork, No Show*, etc.). Email can be sent regarding the canceled appointment by use of the *Cancellation Email* option.

Electronic Medical Business Operations System (EMBOS®)
Cancel Appointment Form For Test Purposes Only

Schedule Reports

Name: Mary (First) Two (Middle) Demo (Last) **Patient Quick Links ▼ Patient ID:** 11144

Birth Date: 7/4/1976 **Age:** 35 **Gender:** Female **Race:** White **SSN:** 201-10-9092

Organization: Unknown **Home Phone:** () - - **User ID:** Y1102

Comp Job Title: **Work Phone:** () - -

Facility: SRS Occupational Health Services **Appt Date:** 11/17/2011 **Appt ID:** 87380

Status: Scheduled **Appt Time:** 3:14 PM **Schedule Method:** Medical

Reason: Sick **Confirmation Email:** ☐ **Cancellation Email:** ☐

Scheduled Cases **Appointment History**

Scheduled Case Workload for: Mary Two Demo on Thursday 11/17/2011 (Appointment)

Case#	Start Date	Last Serviced	Description
123929	9/10/2011	9/10/2011	Psychological Visit
124651			Acrylonitrile Exposure

When an appointment is canceled, it is given a state of *Canceled*.

Provider Schedule

The Provider Schedule in the EMBOS Scheduling module allows users to view provider schedules based on medical roles, create provider events for a specific provider, reschedule provider events for a specific provider, and delete provider events for a specific provider. The view of the schedule can be filtered by security roles based on user work functions. (For detailed information on EMBOS security roles, see the *Administrator* chapter.)

Electronic Medical Business Operations System (EMBOS®)
Providers Schedule - Home Page

September 2011

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Filter By:
EMBOS_LAB_ROLE **View**

	Shelton, Patsy
6:00 AM	
6:30 AM	
7:00 AM	
7:30 AM	
8:00 AM	
8:30 AM	
9:00 AM	
9:30 AM	
10:00 AM	
10:30 AM	
11:00 AM	

The *Filter By* drop-down list lets you select which medical role's calendar you want to view.

Filter By:

EMBOS_LAB_ROLE	View
EMBOS_ADMINISTRATOR_ROLE	
EMBOS_HRP_ROLE	
EMBOS_LAB_ROLE	
EMBOS_NURSE_ROLE	
EMBOS_PHYSICIAN_ROLE	
EMBOS_RECORD_ROLE	
EMBOS_XRAY_ROLE	
EMBOS_BE_ROLE	
EMBOS_SCHEDULE_ROLE	
EMBOS_LAB_INTERFACE_ROLE	
EMBOS_SOMD_ROLE	
EMBOS_DESIGNATED_PHYSICIAN_ROLE	

To create a provider event, double-click on a time slot on the specific provider's calendar, and then select an activity from the displayed *Provider Activities List*.

Shelton, Patsy	
6:00 AM	
6:30 AM	
7:00 AM	
7:30 AM	
8:00 AM	
8:30 AM	
9:00 AM	
9:30 AM	
10:00 AM	
10:30 AM	
11:00 AM	
11:30 AM	
12:00 PM	
12:30 PM	
1:00 PM	
1:30 PM	

User ID: EMBOSAPPDV11A2B3 - Database: srsd.world - Active Schema...

Electronic Medical Business Operations System (EMBOS®)

Activity Select Form For Test Purposes Only

SRS Provider Activities List

- SRS Provider Activities
 - Provider Activities
 - AA Friday Off
 - Administrative Meeting
 - Holiday
 - Not Available
 - Nurse Meeting
 - Physician Meeting

A *Provider Event Form* then opens in which you can edit the facility and date and time. Click the *Save* or *Save & Exit* buttons to complete the event.

The event then appears on the provider's calendar. If there is a need to reschedule the event, use the folder icon for the event.

	Shelton, Patsy	
6:00 AM		
6:30 AM	Admin Meeting
7:00 AM		
7:30 AM		
8:00 AM		

This opens the event and lets you change the time and date. To delete the event, use the X icon next to the folder icon.

Monthly Schedule

The Monthly Schedule in the EMBOS Scheduling module allows the user to view counts of appointments and navigate to the Patient Schedule.

The Monthly Schedule shows the following counts for each day as follows:

- Total count of appointments that have *Annual* as a scheduled case
- Of the total count of appointments that have *Annual* as a scheduled case, how many patients are in the HRP program

- Of the total count of appointments that have *Annual* as a scheduled case, how many patients are in the DOT program

Electronic Medical Business Operations System (EMBOS®)
Monthly Schedule - Home Page For Test Purposes

On September 14 on the Monthly Calendar above, there were three appointments that have *Annual* as a scheduled case, and no appointments that have *Annual* as a scheduled case for patients that are in either the HRP or DOT programs. Clicking on the folder icon for September 14 shows the appointments making up these counts.

Appointments for: Wednesday, September 14, 2011

Status	Time	User ID	Patient	Case Description(s)
Scheduled	6:00 AM	R0100	Blazer, Ruth A Programs: - Breast Wellness Program - Wellness Program	Case # 122883 [New] Annual Case # 124655 [New] Surveillance Exam
Scheduled	6:00 AM	J5500	Fisher, John Programs: - Breast Wellness Program - Wellness Program	Case # 122884 [New] Annual Case # 124654 [New] Surveillance Exam
Scheduled	6:00 AM	R8765	Reynolds, Russ Programs: - Asbestos Medical Surveillance Program - Laser - Wellness Program	Case # 122885 [New] Annual Case # 124656 [New] Surveillance Exam

Each daily folder icon serves as a navigation tool to view the Patient Schedule for that day. If appointments are created, canceled, or rescheduled on the Patient Schedule, the Monthly Schedule updates the corresponding counts.

Auto Schedule

Auto Schedule in the EMBOS Scheduling module allows the user to automatically create and migrate appointment transactions. The creation and migration of appointment transactions occur in a batch mode based on a user selected month. The user can create multiple appointment transactions for an entire month by running one *Run Auto Scheduler* action.

Appointment Transactions for: November 2011

« < November 2011 > »

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Action for November 2011:

Run Auto Scheduler Run

Date	Time	Patient Name	Badge	Shift	Activity
11/1/2011	6:00 AM	Fisher, John		31	Annual
11/1/2011	6:00 AM	Foster, Gloria B		31	Annual
11/1/2011	6:00 AM	Kirk, James T		31	Annual
11/2/2011	6:00 AM	Gordon, Jeff L		31	Annual
11/2/2011	6:00 AM	Sparrow, Jack		AA	Annual
11/2/2011	6:00 AM	Thomas, Sula		10	Annual
11/3/2011	6:00 AM	Jacobs, Jimmy J		31	Annual
11/3/2011	6:00 AM	North, Andy A		20	Annual
11/4/2011	6:00 AM	Blazer, Ruth A		20	Annual
11/4/2011	6:00 AM	Brummett, Jill B		31	Annual
11/7/2011	6:00 AM	Boatman, Kathy		31	Annual
11/7/2011	6:00 AM	Fortney, Robert		23	Annual
11/8/2011	6:00 AM	Shissler, Linda		31	Annual
11/8/2011	6:00 AM	Sproles, Becky S		30	Annual
11/9/2011	6:00 AM	Hill, Alice		31	Annual

In addition, the user can migrate multiple appointment transactions for an entire month by running the *Migrate Appointments* action.

Appointment Transactions for: November 2011

« < November 2011 > »

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Action for November 2011:

Migrate Appointments Run

Date	Time	Patient Name	Badge	Shift
11/1/2011	6:00 AM	Fisher, John		31
11/1/2011	6:00 AM	Foster, Gloria B		31
11/1/2011	6:00 AM	Kirk, James T		31
11/2/2011	6:00 AM	Gordon, Jeff L		31
11/2/2011	6:00 AM	Sparrow, Jack		AA
11/2/2011	6:00 AM	Thomas, Sula		10
11/3/2011	6:00 AM	Jacobs, Jimmy J		31
11/3/2011	6:00 AM	North, Andy A		20
11/4/2011	6:00 AM	Blazer, Ruth A		20
11/4/2011	6:00 AM	Brummett, Jill B		31
11/7/2011	6:00 AM	Boatman, Kathy		31
11/7/2011	6:00 AM	Fortney, Robert		23
11/8/2011	6:00 AM	Shissler, Linda		31
11/8/2011	6:00 AM	Sproles, Becky S		30
11/9/2011	6:00 AM	Hill, Alice		31

Appointment transactions are migrated to appointments during the *Migrate Appointments* action. The migration of an appointment transaction creates a new appointment, creates a new case, and sends a confirmation email to the patient.

The editing and deleting of appointment transactions occur one at a time by using the *Open/Edit Appointment* icon and the *Delete* icon.

Appointment Transactions for:

November 2011

EMBOS Registration

EMBOS defines Registration as an association between a person and SRS Medical for the purpose of providing medical services. A Registration occurs at a discrete point in time within a given day, usually when a patient checks in for an appointment.

The EMBOS Registration module implements functions associated with patient registration and with registering and maintaining new and existing cases. To access the Registration module, click *Registration* and then *Register Patients* from the EMBOS home page.

Prior to recording data into EMBOS about medical cases or services performed on (or for) a given patient, the patient **must** first be registered. Registering a patient simply records the date and time the patient was registered.

There are two types of registrations:

- Visit Registration – A registration that occurs when a patient visits the medical facility.
- Non-Visit Registration - A registration that occurs without the patient being present.

For Visit Registrations, the registration date and time is often referred to as the “check-in” time. Visit Registrations also have a “check-out” time property.

To maintain data integrity, the EMBOS application enforces the following registration rules:

- A patient must be checked out from previous visit registrations before a new registration (visit or non-visit) can be created.
- A visit registration’s check-in date-time must be earlier than the checkout date-time.
- A registration’s (visit and non-visit) registration/check-in date and time cannot fall within the time span of an existing visit registration.
- A visit registration’s check-out date-time cannot fall within the time span of an existing Visit Registration.
- A patient can be registered multiple times during a given day, as long as the above rules are met.
- The time span of a visit registration always falls with a given day.
- Registrations (visit and non-visit) can be deleted as long as there are no cases (or services, which are discussed in the Workstation module) associated with them.

Register Patient from an Existing Appointment

The patient and case registration process is streamlined if the patient being registered already has an appointment. To register a patient from an existing appointment, click *Registration* and then *Register Patients* from the EMBOS home page.

Then select an appointment in the Scheduled Patients list that displays on the top of the Registration home page and then click the *Check-In/Register Patient from Selected Appointment* icon .

Electronic Medical Business Operations System (EMBOS®)
Registration - Home Page For Te

Patient Reports

Scheduled Patients on: Thursday, October 06, 2011

Status	Sched Time	User ID	Patient	Case Description(s)
Scheduled	1:37 PM	D1001	Demo, Edna L Programs: - Beryllium Worker Program - Breast Wellness Program - HRP - Human Reliability Program - Hearing Conservation Program - Respirator Clearance - 1 Year (Annual) - Wellness Program	
Scheduled	2:37 PM	J0915	Demo, Joseph W	
Scheduled	2:45 PM	Y1102	Demo, Mary T	

Registered Patients on: Thursday, October 06, 2011

This action results in EMBOS performing the following actions:

- EMBOS automatically creates a new visit registration record for the patient identified in the appointment.
- EMBOS automatically registers any cases that were linked to the appointment with the newly created visit registration.
- EMBOS automatically creates a link between the newly created visit registration and the appointment.
- EMBOS sets the visit registration date to the appointment date.
- EMBOS sets the default registration/check-in time to the current time.
- EMBOS then displays the Visit Registration screen.

Once the visit registration screen is displayed, *Check-In Time* defaults to the current time. The *Facility* field can be changed if necessary. After the information in the form is saved, the user can register/add additional new or existing cases to the registration, edit and view a selected case, and unregister/remove cases from the visit registration.

Electronic Medical Business Operations System (EMBOS®)
Patient Registration Form (Visit) For Test Purposes Only

Reports

Name: Edna (First) L (Middle) Demo (Last) **Patient Quick Links ▼ Patient ID:** 12142

Birth Date: 7/4/1955 **Age:** 56 **Gender:** Female **Race:** White **SSN:** 201-11-0011

Organization: Unknown **Home Phone:** () - - **User ID:** D1001

Comp Job Title: **Work Phone:** () - -

Facility: SRS Occupational Health Services **Registration Date:** 10/6/2011 **Reg ID:** < new >

Check-In Time: 1:52 PM

Check-Out Time:

Registered Cases **Appointment History**

Registered Case Workload for: Edna L Demo on Thursday 10/6/2011 (Visit)

Register a New Case

Register/Follow-Up an Existing Case

Edit/Open a Selected Case

View Selected Case

Remove Selected Case

Once a patient and associated cases have been registered/checked-in, the selected patient from the *Scheduled Patients* list is moved to the *Registered Patients* list displayed at the bottom of the Registration home page. From icons on the toolbar displayed above the Registered Patient list, patients can be checked out and a registration can be viewed, edited, and deleted.

Electronic Medical Business Operations System (EMBOS®)

Registration - Home Page

Patient Reports

Scheduled Patients on: Thursday, October 06, 2011

Status	Sched Time	User ID	Patient	Case Description(s)
Scheduled	2:37 PM	J0915	Demo, Joseph W	
Scheduled	2:45 PM	Y1102	Demo, Mary T	

Close Refresh

Registered Patients on: Thursday, October 06, 2011

Status	Source	Reg Time	Check-Out	User ID	Patient	Case Description(s)
Registered	Visit	1:52 PM		D1001	Demo, Edna L	

Check-In/Register Walk-In Patient

Check Out Patient

Register Patient (Non-Visit)

Open/Edit Selected Registration

Delete Selected Registration

View Selected Registration

Register Patient without an Existing Appointment

The toolbar located at the bottom of the Registration home page can be used for registering a patient who does not have an existing appointment. From this toolbar, non-visit and visit registrations can be created, deleted, viewed and edited. This toolbar can also be used to “check-out” a patient from a visit registration.

Electronic Medical Business Operations System (EMBOS®)
Registration - Home Page

Patient Reports

Scheduled Patients on: Thursday, October 06, 2011

Calendar: October 2011
 S M T W T F S
 1
 2 3 4 5 6 7 8
 9 10 11 12 13 14 15
 16 17 18 19 20 21 22
 23 24 25 26 27 28 29
 30 31

Close
Refresh

Status	Sched Time	User ID	Patient	Case Description(s)
Scheduled	2:37 PM	J0915	Demo, Joseph W	
Scheduled	2:45 PM	Y1102	Demo, Mary T	

Registered Patients on: Thursday, October 06, 2011

Status	Source	Req Time	Check-Out	User ID	Patient	Case Description(s)
Registered	Visit	1:52 PM		D1001	Demo, Edna L	

Check-In/Register Walk-In Patient

Check Out Patient

Register Patient (Non-Visit)

Open/Edit Selected Registration

Delete Selected Registration

View Selected Registration

Register Walk-In Patient

To register a walk-in patient (i.e., does not already have an appointment), click the *Check-In/Register Walk-In Patient* icon on the toolbar above the Registered Patients list.

Use the *Person Select* form to locate the record for the specific walk-in patient. Follow instructions on how to use this form in the *EMBOS Basics* chapter.

Once the visit registration screen is displayed, *Check-In Time* defaults to the current time. The *Facility* field can be changed if necessary. After the information in the form is saved, the user can register/add additional new or existing cases to the registration, edit and view a selected case, and unregister/remove cases from the visit registration, similar to registering a patient with an existing appointment.

Register Non-Visit Patient

To register a non-visit patient (i.e., is not present at the medical facility), click the *Register Patient (Non-Visit)* icon on the toolbar above the Registered Patients list.

Use the *Person Select* form to locate the record for the specific walk-in patient. Follow instructions on how to use this form in the *EMBOS Basics* chapter.

Once the non-visit registration screen is displayed, *Registration Time* defaults to the current time. The *Facility* field can be changed if necessary. After the information in the form is saved, the user can register/add additional new or existing cases to the registration, edit and view a selected case, and unregister/remove cases from the visit registration, similar to registering a patient with an existing appointment.

Register Cases for Patient without an Appointment

A medical case is defined in EMBOS as an instance or occurrence of a medical activity requiring medical services. SRS Medical has created a pre-defined set of medical activities that encompass the domain of activities deemed relevant to their operations. Cases can be short-lived; i.e., they start and end during a single registration (visit or non-visit) and therefore only get registered once. Cases can also be long-lived; i.e., they extend over multiple registrations (visit and non-visit) that occur over weeks, months, or even years and therefore the same case may be registered multiple times.

Processes associated with creating and registering new and existing cases are implemented in the EMBOS Registration module. Case registration is a two-step process. The first step is to create the new case or identify an existing case that requires registration. The second step is to register or add the new or existing case to a registration.

Since all cases **must** be registered, the registration of new and existing cases is performed from the Visit and Non-Visit Registration screens. The toolbar above the Registered Cases list provides separate icons for each of the maintenance actions associated with registering cases. [NOTE: If you hover the cursor over an icon, a tool tip will be displayed describing that icon's function.]

Electronic Medical Business Operations System (EMBOS®)
Patient Registration Form (Visit) For Test Purposes Only

Reports

Name: ToDelete (First) S (Middle) Demo (Last) **Patient Quick Links ▼ Patient ID:** 11642

Birth Date: 7/4/1976 **Age:** 35 **Gender:** Female **Race:** White **SSN:** 201-10-9171

Organization: Unknown **Home Phone:** () - - **User ID:** D0917

Comp Job Title: **Work Phone:** () - -

Facility: SRS Occupational Health Services **Registration Date:** 9/23/2011 **Reg ID:** 87961

Check-In Time: 3:04 PM **Check-Out Time:**

Registered Cases **Appointment History**

Registered Case Workload for: ToDelete S Demo on Friday 9/23/2011 (Visit)

Register a New Case
Register an Existing Case
Edit/Open a Selected Case
View Selected Case
Remove Selected Case

Clicking the *Register a new Case* icon on the toolbar displays a list of SRS Medical's pre-defined Activities to select from.

Electronic Medical Business Operations System (EMBOS®)
Activity Select Form For Test Purposes Only

SRS Medical Activities List

- [-] SRS Medical Activities
 - [+] Consultation Activities
 - [+] Examination Activities
 - [+] Exposure Activities
 - [+] Miscellaneous Activities
 - [+] Surveillance Activities (Panels)
 - [+] Psych Activities

After selecting the pre-defined Activity, EMBOS creates the new case, associates the case with the registration, and then displays the Registered Case screen.

Case#	Start Date	Last Serviced	Description
125740	9/23/2011	9/23/2011	Arra Exam - One Phase
125739	9/23/2011	9/23/2011	Arsenic Exposure

NOTE: The new case is not actually saved and registered until the registered case is saved.

Clicking the *Register an Existing Case* icon on the toolbar displays a list of existing cases. After selecting one of the existing cases, EMBOS associates the selected case with the registration and then displays the Registered Case screen. [NOTE: The existing case is not actually registered until the registered case is saved.]

Check-Out a Patient

To check out a patient, select the patient and then click the *Check out Patient* icon on the toolbar above the Registered Patients list.

The *Check-Out Time* defaults to the current time in the Visit Registration form. Be sure to save the information in the Visit Registration form.

The *Check-Out* time is then displayed for the patient on the Registration home page.

Status	Source	Reg Time	Check-Out	User ID	Patient
Registered	Visit	1:52 PM	2:16 PM	D1001	Demo, Edna L
Registered	Visit	2:14 PM		J0915	Demo, Joseph W

Open/Edit a Registration

To open/edit a registration, select the registration and then click the *Open/Edit Selected Registration* icon on the toolbar above the Registered Patients list.

The Patient Registration Form opens and allows you to make changes to it.

Delete a Registration

To delete a selected registration, select the registration and click the *Delete Selected Registration* icon on the toolbar above the Registered Patients list.

The Patient Registration Form opens and allows you to delete it.

Registered Cases Appointment History

Registered Case Workload for: ToDelete S Demo on Friday 9/23/2011 (Visit) [X]

Case#	Start Date	Last Serviced	Description
125740	9/23/2011	9/23/2011	Arra Exam - One Phase
125739	9/23/2011	9/23/2011	Arsenic Exposure

Delete Close

View Registration

To view a registration, select the registration and then click the *View Selected Registration* icon on the toolbar above the Registered Patients list.

This allows you to view the registration but not make any changes in it.

EMBOS Workstations

The EMBOS Workstations module provides functionality for medical providers to document specialized cares in Occupational Health services. The Workstations module is divided into distinguish areas of care to maximize workflow efficiency of medical services provided in all facilities. The list below is the currently supported functions of the EMBOS *Workstations*.

- X-Ray Department
- Medical Laboratory
- Psychology Clinic
- Nursing Care
- Clinician Office
- SOMD

Users can access the Workstation modules from the *Workstations* main menu of the EMBOS *Home Page*.

EMBOS users can create and maintain employee/patient health records throughout the process of care. Each workstation provides a centralized view of patient EHR (Electronic Health Record) including lab results, diagnostic studies, and clinical notes.

Overview

The EMBOS *Workstations Home Page* displays daily workload and services needed for each patient.

Patient/Case Workload for: Thursday, September 15, 2011

Status	Source	Reg Time	Check-Out	User ID	Patient	Case Description(s)
Registered	Visit	9:15 AM		J0915	Demo, Joseph W Programs: - Beryllium Sensitized Worker Program - HRP - Human Reliability Program - Wellness Program	Case # 124727 [New] Non-Occ Illness
Scheduled	Appt.	6:00 AM	n/a	R4500	Fortney, Robert	Case # 122886 [New] Annual
Scheduled	Appt.	6:00 AM	n/a	J5519	Gordon, Jeff L	Case # 122887 [New] Annual
Scheduled	Appt.	6:00 AM	n/a	S0200	Qualified, Steve A	Case # 122888 [New] Annual

Users can simply click on each visit registered or scheduled for the day. At the bottom half of the home page, services information is displayed for the selected (highlighted) visit record.

■ **Services Performed for:** Demo, Joseph W on Thursday, September 15, 2011 (Visit)

Service#	Start Date	Start Time	Description	Provider	Status
125211	9/15/2011	10:00 AM	Urine Drug Screen (DOT)	North, Melissa P	In Process
125212	9/15/2011	9:45 AM	X-Ray Procedure - Chest	Shissler, Linda	In Process
124731	9/15/2011	9:30 AM	Check Vitals	Lyell, Stacey M	Completed
124729	9/15/2011	9:30 AM	Urinalysis	Lyell, Stacey M	Completed
124728	9/15/2011	9:30 AM	CBC	Shelton, Patsy M	Completed
124730	9/15/2011	9:30 AM	Check Blood Pressure	Lyell, Stacey M	Completed

Future scheduled or past visits can be accessed by choosing a date from the *Service Date Calendar* tool on the left of the home page. The Workstations Home Page will render visit and service records accordingly.

On a typical work day, *Workstations Home Page* is where users start their routines. After choosing one of the *Workstation* options (e.g., Nurses Workstation) from the main menu, *Nurses Workstation – Home Page* window dialog appears. The current date is highlighted on the *Service Date Calendar* as default. The *Patient/Case Workload* screen lists patients who are scheduled for the day visit. Users can choose an appointment record listed or register a new visit record as a walk-in patient. The next step is to check the patient into the system. The process is also referred to as “Registering Patient.” The *Patient Registration Form* dialog appears. Enter a check-in time (default to current time) and save the visit record. A visit record needs to be saved (created) before a service can be added to the visit. In other words, patients need to be registered before being seen. In some cases, visits are created or registered for services provided to patients who are not physically at the facility, e.g., telephone consultation. This type of registration is referred to as “Non-Visit Registration”.

After a patient is registered, users can add services to the visit record. Services can be chosen from a variety of procedures categorized into 6 main areas; Immunization, Laboratory, X-Ray, Psychology, OSR, and Others. Care and Diagnostic records are documented and saved with the visit record as *Patient EMR*.

On any *Workstations Home Page*, the screen is divided into 2 sections; Calendar Workload and Services Performed. The *Patient/Case Workload* section lists appointment and visit records for the selected service date. The *Services Performed* section (lower section) lists services related to the selected visit date above. When users highlight a different visit from the Workload table, a list of corresponding services is displayed in the lower table for the selected visit. Users can add or modify records of each section by using the function menu located on the top-right corner of each section.

Workload Menu

The Workload menu contains command functions used for manipulating appointment and visit records. To check-in or register a scheduled appointment, highlight an appointment record and click on the register icon. Users can also register an unscheduled visit as a walk-in patient by using the walk-in icon. An appointment cannot be checked out unless it is registered or checked in.

To document services performed by phone, first register a patient as Non-Visit record using the closed door icon. Then new services can be added to the visit in the Services Performed section. The Open and View icons have similar functions. Users can open a visit record and make changes or view a record without saving it. These menu functions open various window dialogs depending on the task performed on a record.

Service Menu

The Service menu contains command functions to add, edit, display, and delete service records. After selecting a patient visit from the Workload list, users can add medical and/or diagnostic procedures to be performed and documented. A service is added using the blank page icon. The *Activity Select Form* is opened for users to select procedures from predefined lists. A procedure data entry form is opened based on the selected procedure. Multiple procedures or services can be added to a visit. In some cases, patients need to have follow-up visits. Users can schedule a follow-up service on an existing procedure using the rotating green arrows icon.

Users can open or view service records depending on their status. A “Completed” service can only be viewed without modification. To view detailed information of a service record, highlight a service record row, and then click on the blue eye icon. Services with the “In Process” status can be opened for users to modify. A service or procedure record can be deleted only if there is no other information or record attach to it.

Immunizations

The Immunizations module contains a list of predefined forms for EMBOS users to enter historical records of past immunizations or current procedures performed on patients. Users can access the list of procedures from any EMBOS Workstation. After a patient is registered, users can add an immunization service from the list of *SRS Medical Procedures*. An *Immunization Service Form* of the selected procedure is opened. The form consists of three main sections. Like most of the EMBOS forms, the patient information is displayed on the top header of the form. The middle section of the form lists selected procedures and information related to the service. Users can record service location, time of service, service provider, and status of the procedure. The last section of the form records detailed information of the immunization including lot number, dosage, administration route, and strength given.

To document information on this *Immunization Service Form*, users shall adopt the five rights of medication administration; right patient, right drug, right dose, right route, and right time. First, verify that the right patient is displayed on the form.

Immunization Service Form For Test Purposes Only

Name: <input type="text" value="Joseph"/> <input type="text" value="W"/> <input type="text" value="Demo"/>	Patient Quick Links ▼	Patient ID: <input type="text" value="11641"/>
(First) (Middle) (Last)		
Birth Date: <input type="text" value="7/4/1961"/>	Age: <input type="text" value="50"/>	Gender: <input type="text" value="Male"/>
	Race: <input type="text" value="Asian American"/>	SSN: <input type="text" value="201-10-9151"/>
Organization: <input type="text" value="Unknown"/>	Home Phone: <input type="text" value="() - -"/>	User ID: <input type="text" value="J0915"/>
Comp Job Title: <input type="text"/>	Work Phone: <input type="text" value="() - -"/>	

The second half of the form captures detailed information of the medication administration record including the vaccine, the dosage, the route, and the given time.

Time Picker

6:00 AM	6:15 AM	6:30 AM	6:45 AM	7:00 AM	7:15 AM
7:30 AM	7:45 AM	8:00 AM	8:15 AM	8:30 AM	8:45 AM
9:00 AM	9:15 AM	9:30 AM	9:45 AM	10:00 AM	10:15 AM

Comment: Immunization - Hepatitis A (1)

Patient is traveling outside of the US.

Procedure: <input type="text" value="Immunization - Hepatitis A (1)"/>	Comments:	Service #: <input type="text" value="< new >"/>
Facility: <input type="text" value="SRS Occupational Health Services"/>	Start Date: <input type="text" value="9/15/2011"/>	Provider: <input type="text" value="Barbee, Christy F"/>
Curr Service Date: <input type="text" value="9/15/2011"/>	Start Time: <input type="text" value="11:00 AM"/>	Status: <input type="text" value="In Process"/>

Injection | **Signature**

Manufacturer:

Strength:

Injection Site:

Ordered By:

Adverse Reaction:

Brand Name:

Dosage:

Route of Administration:

Expiration Date:

Lot #:

Left Arm
 Left Deltoid
 Left Forearm
 Left Gluteal
 Right Arm
 Right Deltoid
 Right Forearm
 Right Gluteal

Intracutaneous
 Intramuscular
 Subcutaneous

Most of the EMBOS data entry forms contain comment fields, indicated by the callout icon.

When a comment is saved, the icon is changed from to (callout with pencil) as an

indication for the existence of comment data. For convenience of data entry, a *Time Picker* button is provided in all of the forms with a time component. A time can be chosen from a list of times in 15 minute intervals, starting from 6:00 a.m. The button is indicated by an alarm clock

icon which is located to the right of any time field.

Ordering Provider, Route of Administration, Dosage, and Injection Site are the required data fields for this form. The patient must also sign the Signature tab before the service *Status* can be saved as “Completed” along with the “performed by” for the *Provider* field.

The screenshot shows the 'Immunization - Influenza' form. At the top, there are fields for Procedure (Immunization - Influenza), Facility (SRS Occupational Health Services), Start Date (9/15/2011), Start Time (7:24 PM), Comments, Service # (< new >), Provider (Barbee, Christy F), and Status (In Process). Below these are tabs for Injection and Signature. The Injection tab is active, showing fields for Manufacturer (Abbott Laboratories), Brand Name (Sam's Club), Expiration Date (7/14/2013), Strength (High), Dosage (200 mg), Lot # (125), Injection Site (Left Arm), Route of Administration (Intracutaneous), and Ordered By (Beryllium, Tommy). An Adverse Reaction field is also present. Two blue lines with dots point to specific fields: one points to the 'Ordered By' field, and another points to the 'Provider' field. Below the form, there are two yellow boxes: 'Required' and 'Required when Status is "Completed"'. The 'Required' box has a line pointing to the 'Ordered By' field. The 'Required when Status is "Completed"' box has a line pointing to the 'Provider' field.

Lab Procedure

The Lab Procedure module in EMBOS provides users with predefined data entry forms to collect pertinent information of various lab tests. Each *Lab Test Service Form* contains patient demographic information at the top of the form, detailed procedure information in the middle section, and lab test results in the bottom section of the form.

From the *Medical Lab Workstation Home Page*, pick a registered patient from the *Workload* table, and then add a lab procedure by choosing one from the *SRS Medical Procedures List*. The list provides 20+ typical lab tests, e.g., CBC, CMP, and Urinalysis. After choosing a test, the *Lab Test Service Form* dialog appears. The test result components for the selected lab procedure are listed along with their Unit of Measure (UOM) and Reference Range. To view the reference range values, users can simply mouse hover the brackets icon. Users can also add comments to attach to any of the test results.

User ID: EMBOSAPPDV\JA2B3 - Database: srsl.world - Active Schema: OPR\$EMBOS - Webpage Dialog

Electronic Medical Business Operations System (EMBOS®)

Lab Test Service Form For Test Purposes Only

History Reports | Lab Reports

Name: Joseph W Demo Patient Quick Links ▼ Patient ID: 11641
 (First) (Middle) (Last)

Birth Date: 7/4/1961 Age: 50 Gender: Male Race: Asian American SSN: 201-10-9151

Organization: Unknown Home Phone: User ID: J0915

Comp Job Title: Work Phone:

Procedure: Chemistry Panels Comments: Service #: < new >

Facility: SRS Occupational Health Services Start Date: 9/15/2011 Lab Tech: Davis, Melissa T

Curr Service Date: 9/15/2011 Start Time: 9:15 AM Status: In Process

Lab Facility: SRS Occupational Health Services Analysis Date: 9/15/2011 Fasting: Fasting

Lab Test Results

TOTAL CHOLESTEROL	mg/dL	LDL	mg/dL
TRIGLYCERIDE	mg/dL	TOTAL CHOLESTEROL/ HDL	mg/dL
URIC ACID	mg/dL	SERUM CLARITY	
GGT	u/L	K+	mg/dL
ALT	u/L	PHOS	mg/dL
AST	u/L	CA	mg/dL
ALKALINE PHOSPHATASE	u/L	TP	mg/dL

Save Save & Exit Close

For Test Purposes Only

HDL CHOLESTEROL mg/dL

30 ≤ x ≤ 70

Some of the lab result components are free-text fields; some are drop-down lists. Any abnormal value entered is highlighted with a changed color cell. High result values are highlighted in red while low result values are highlighted in blue. Comments can be added to indicate related events or probable causes.

Lab Test Results

WBC	48	10 ³ /UL	NE	20	
RBC	5.5	10 ⁶ /UL	LY	52	
HGB	11	g/dL	MO	7	
HCT	42	%	EO	2	
MCV	81	fL	BA	4	
MCH	32	pg	NE%	76	%
MCHC	33	g/dL	LY%	82	%

Comment: WBC

Temp 101.2 F

Lab Test Results

GLUCOSE	Normal	mg/dL	NITRATE	Negative	
KETONE	Negative	mg/dL	pH	7.5	
OCCULT BLOOD	Negative		SPECIFIC GRAVITY	<=1.005	
PROTEIN	Negative	mg/dL	Manual SG	1.015	
BILLIRUBIN	Negative		UROBILINOGEN	Normal	mg/dL
LEUKOCYTES	Negative				

Comment: SPECIFIC GRAVITY

Patient claims to have been drinking
lots of water.

Below is the list of available lab procedure forms for SRS:

- Amsler Grid Vision Test
- Arsenic (Urine)
- Audiogram
- Beryllium LPT
- Beryllium LPT Additional Sera
- Blood Lead Level & Zinc
Protoporphyrin
- CBC
- CBC Manual Diff
- Chemistry Panels
- Color Wire Vision
- ECG
- HIV
- Hemocult
- Hepatitis B
- Jaeger Eye Exam
- Mercury (Blood)
- Mercury (Urine)
- PSA
- Snellen Eye Chart
- Spirometry
- Thallium (Urine)
- Tonometry Tension
- Urinalysis
- Urinalysis Microscopic
- Visual Acuity
- Substance Screening Procedures

Check Vitals

The Check Vitals module in EMBOS captures patients' vital signs and feeds the information into other medical procedure forms. The *Body Mass Index* field is auto populated when a patient's height and weight are entered in inches and pounds, respectively.

The screenshot shows the 'Check Vitals' form with the following fields and values:

- Body Mass & Temperature:**
 - Height: 66 (inches)
 - Weight: 122 (pounds)
 - Body Mass Index: 19.69
 - O2 Saturation: 97 (percent)
 - Temperature: 98.7 (deg F selected, deg C unselected)
 - Temperature Method: Oral
- Blood Pressure:**
 - Position: Supine
 - Arm: Left
 - Systolic: 124 (mmHG)
 - Diastolic: 67 (mmHG)
- Pulse & Respiratory:**
 - Pulse Rate: 54 (beats per minute)
 - Pulse Character: Regular (selected, Irregular unselected)
 - Respiratory Rate: 22 (breaths per minute)

Two callout boxes are present:

- A box for the 'Position' dropdown menu containing: Sit, Stand, Supine.
- A box for the 'Temperature Method' dropdown menu containing: Not Taken, Oral, Rectal, Axillary, Tympanic.

Four vitals are required in order to complete the form; *Temperature*, *Systolic* and *Diastolic* blood pressure in mmHG, and *Pulse Rate* in beats per minutes.

Clinical Evaluation

The Clinical Evaluation module in EMBOS adopts the SOAP note (Subjective, Objective, Assessment, and Plan) method of documenting medical care and assessment. Each of the SOAP note components is divided into four separate tabs. Each tab contains a free-text field to provide clinicians with flexibility of documenting their care delivered to patients; the SOAP note structure allows the medical information to be exported and imported to other modules in the application.

Electronic Medical Business Operations System (EMBOS®)
Clinical Evaluation Form For Test Purposes Only

Questionnaire Reports Add Related Services

Name: Edna L Demo **Patient Quick Links** Patient ID: 12142
(First) (Middle) (Last)

Birth Date: 7/4/1955 **Age:** 56 **Gender:** Female **Race:** White **SSN:** 201-11-0011

Organization: Unknown **Home Phone:** () - - **User ID:** D1001

Comp Job Title: **Work Phone:** () - -

Procedure: Clinical Evaluation **Comments:** **Service #:** 127243

Facility: SRS Occupational Health Services **Start Date:** 9/15/2011 **Provider:** Blazer, Ruth A

Curr Service Date: 9/15/2011 **Start Time:** 3:05 PM **Status:** Completed

Subjective Findings Objective Findings Assessment Plan

Subjective Findings (Narrative)
Patient complains headache and sore throat. NKDA, allergic to latex.

At least one section of the SOAP note needs to be filled out before the service can be marked as completed. The error message dialog (below) appears when users attempt to save an empty form with the “Completed” status.

Beryllium Assessment

The Beryllium Assessment module is one of the health assessment forms in EMBOS. Providers can document assessment as an SOAP note workflow; *Subjective* findings, *Objective* findings, *Assessment*, and *Plan*. Each section of the SOAP note is separated into its own tab. Optionally, providers can import an existing assessment as the starting point of the current findings. The *Import an existing Assessment* utility takes SOAP components of the selected assessment and appends them accordingly.

Procedure: Beryllium Assessment Comments: Service #: 127238

Facility: SRS Occupational Health Services Start Date: 9/15/2011 Provider: Beryllium, Tommy

Curr Service Date: 9/15/2011 Start Time: 3:05 PM Status: In Process

Import an existing Assessment: < select assessment > **Import**

Subjective Findings Objective Findings Assessment Plan

Subjective Findings (Narrative)

Subjective Findings

Providers can document a patient's chief complaint or HPI (History of Present Illness) in this section of the SOAP note. At least one of the sections in SOAP note needs to be filled before the *Beryllium Assessment* service can be marked as "Completed".

Subjective Findings Objective Findings Assessment Plan

Subjective Findings (Narrative)

Patient was registered as a walk-in with the following complains;

- Persistent Coughing
- SOB
- Mild Chest Pain
- Heart Palpitations
- Loss of Appetite

Objective Findings

Providers can narrate the physical examination and objective findings in this section of the SOAP note. If a *Check Vitals* service were performed on the patient in the same day, the vital signs are populated on the top portion of the *Objective Findings* section.

Subjective Findings	Objective Findings	Assessment	Plan
Vital Signs completed on: Thursday, September 15, 2011 at 3:05 PM			
<u>Height & Weight</u> Height: 66 inches Weight: 122 pounds BMI: 19.69	<u>Temperature</u> Temperature: 101.70 F Method: ORAL	<u>Blood Pressure</u> Systolic: 142 mmHG Diastolic: 76 mmHG Position: SUPINE Arm: LEFT	<u>Pulse & O2 Sat</u> Character: IRREGULAR Rate: 67 bpm O2 Sat: 97% Resp Rate: 24 bpm
Objective Findings (Narrative)			

Assessment

Providers document the diagnosis in this section based on the observations and findings from the prior sections.

Subjective Findings	Objective Findings	Assessment	Plan
Assessment (Narrative)			
Patient is a 56 y.o. white female with probable Be exposure.			

Plan

This section of the SOAP note records treatments, orders, and medications to address the diagnosis. It may include discharge instructions and follow up plan.

Subjective Findings	Objective Findings	Assessment	Plan
Plan / Recommendations (Narrative)			
Orders: - BeLPT - Follow-Up Visit in 2 weeks			

Physical Exam

The Physical Exam module in EMBOS is a user-friendly template form designed to assist providers with physical examination documentation. The form contains SOAP note tabs just like other EMBOS health assessment forms. In addition to the SOAP note, the *Physical Exam Form* contains a *Body Systems* tab for ease of documenting during the examination. The signature tab allows the medical records to be saved along with patients' signatures.

Procedure: Physical Exam Comments: Service #: 127246

Facility: SRS Occupational Health Services Start Date: 9/15/2011 Provider: Cosby, Otis

Curr Service Date: 9/15/2011 Start Time: 3:15 PM Status: In Process

Body Systems Subjective Findings Objective Findings Assessment Plan Signature

Set Normal to all

Normal	Abnormal	NE		Normal	Abnormal	NE	
☒	☐	☐	Mouth	☐	☒	☐	Throat
☒	☐	☐	Neck	☒	☐	☐	Thyroid
☐	☐	☒	Rectum	☐	☐	☒	Back
☒	☐	☐	Lung	☐	☐	☒	Upper Extremities
☐	☐	☒	Breast	☐	☐	☒	Lower Extremities
☒	☐	☐	Heart	☒	☐	☐	Skin
☒	☐	☐	Vascular	☐	☒	☐	Lymph Nodes
☒	☐	☐	Abdomen	☒	☐	☐	Neurological
☐	☐	☒	Inguinal	☒	☐	☐	Psychological

Comment: Lymph Nodes
Swollen and tender Cervical Lymph Nodes.

Providers can mark all of the body systems as “Normal” to start the exam by simply clicking on the Apply button on the top-left corner of the tab. A comment can be added to each of the body systems. To add a comment, click on the comment icon next to the selected system, type the comment into the *Comment Form*, and click the *OK* button.

Users can add other services using the *Physical Exam Form* menu (located at the top-left corner of the form). The services added include *Patient Questionnaire*, *Medications Evaluation*, *Fitness for Duty*, *Diagnoses Evaluation*, and *Program Evaluation*.

Electronic Medical Business Operations System (EMBOS®)
Physician Exams Form

Questionnaire Reports **Add Related Services**

Name: Edna (First)
Birth Date: 7/4/1955
Organization: Unknown

- New Medications Evaluation Service
- New Fitness for Duty Service
- New Diagnoses Evaluation Service
- New Program Evaluation Service

Signing the Physical Exam

A patient can electronically sign the *Physical Exam Form* on an EMBOS Workstation that is equipped with a TOPAZ signature pad. To acquire the patient's signature, click the yellow pencil icon next to the *Patient Signature* line in the form *Signature* tab. A *Signature Acquire Form* dialog appears. Use only the TOPAZ pen to sign on the signature pad and click on the *Accept* button. To clear the signature and start over, click on the *Reset* button.

User ID: EMBOSAPPDV\1A2B3 - Database: srtd.world - Active Schema: OPR\$E...

Electronic Medical Business Operations System (EMBOS®)
Signature Acquire Form **For Test Purposes Only**

✕

Accept Reset Cancel

For Test Purposes Only

Diagnoses Evaluation

A *Diagnoses Evaluation* service is defined as a provider's assessment of a person's physical (or psychological) condition and the provider's appropriate diagnoses. The *Diagnoses Evaluation* service can be added as a new service or added from a related assessment, e.g., *Physical Exam*.

Procedure: Diagnoses Evaluation Comments: Service #: 127247

Facility: SRS Occupational Health Services Start Date: 9/15/2011 Provider: Cosby, Otis

Curr Service Date: 9/15/2011 Start Time: 3:30 PM Status: In Process

Supporting Assessment: Physical Exam performed on 9/15/2011 by Cosby, Otis

Acute/Temp Diagnoses Permanent Diagnoses

Acute/Temp Diagnoses - New and Continued

ICD9Code	Select	Description	Type	Status
034.0	☐	STREP SORE THROAT	Acute	New

Prior Acute/Temp Diagnoses

Providers can add new diagnoses while any other prior diagnoses documented can be marked as *Continue*. This functionality allows EMBOS to track not only the diagnoses, but also the patients' unique episodes of the conditions which resulted in the diagnoses.

Procedure: Diagnoses Evaluation Comments: Service #: 127250

Facility: SRS Occupational Health Services Start Date: 9/16/2011 Provider: Davis, Melissa T

Curr Service Date: 9/16/2011 Start Time: 3:46 PM Status: In Process

Supporting Assessment: Beryllium Assessment performed on 9/15/2011 by Beryllium, Tommy

Acute/Temp Diagnoses Permanent Diagnoses

Acute/Temp Diagnoses - New and Continued

ICD9Code	Select	Description	Type	Status
995.39	☐	POSITIVE BERYLLIUM SENSITIZATION	Acute	New

Prior Acute/Temp Diagnoses

ICD9 Code	Description	Last Eval Date	Last Evaluated By	Continue
034.0	STREP SORE THROAT	9/15/2011	Otis Cosby	☒

To add a diagnosis, click on the green plus sign icon on the tab menu bar. The *Diagnosis Search Form* appears. Use the *Search Criteria* field to narrow down the diagnosis code results returned. EMBOS uses the “contain” method to search the diagnoses database. For example, to search for a “Strep Throat” diagnosis code, enter the key word “strep” in the *Search Criteria* field and click on the *Search* button. The more characters entered into the search field, the fewer the amount of codes returned. Pick an appropriate code from the *Search Results* list and click on the green greater than icon to move the code to the *Selected Diagnosis* list to the right, and click on the *OK* button at the bottom of the search form. Repeat the steps to add more diagnosis codes. To change the code, select a diagnosis code on the right hand side and click on the green less than icon.

Electronic Medical Business Operations System (EMBOS®)
Diagnosis Search and Select Form For Test

Search Criteria:

Search Results:

026.1	STREPTOBACILLARY FEVER
034	STREP THROAT/SCARLET FEV*
038.0	STREPTOCOCCAL SEPTICEMIA
041.0	STREPTOCOCCUS INFECT NOS*
041.00	STREPTOCOCCUS UNSPECF
041.01	STREPTOCOCCUS GROUP A
041.02	STREPTOCOCCUS GROUP B
041.03	STREPTOCOCCUS GROUP C
041.05	STREPTOCOCCUS GROUP G
041.09	OTHER STREPTOCOCCUS
320.2	STREPTOCOCCAL MENINGITIS
482.3	STREPTOCOCCAL PNEUMONIA*
482.30	STREPTOCOCCAL PNEUMN NOS
482.39	PNEUMONIA OTH STREP
V28.6	ANTENATAL SCREEN STREP B
V02.51	GROUP B STREPTOC CARRIER
V02.52	STREPTOCOCUS CARRIER NEC

Selected Diagnosis:

034.0	STREP SORE THROAT
-------	-------------------

Users can also use a partial ICD-9 code to search for the diagnosis in the database.

Diagnosis Search and Select Form

Search Criteria:

Search Results:

034	STREP THROAT/SCARLET FEV*
034.0	STREP SORE THROAT
034.1	SCARLET FEVER
M8034/3	POLYGONAL CELL CARCINOMA

An existing *Diagnoses Evaluation* service needs to be completed before a new one can be created. A “Completed” Diagnoses Evaluation service cannot be modified or deleted.

Desensitization

The Desensitization module logs date, time, and provider of the desensitization event. The *Provider* field in EMBOS represents the provider who performed the service and is a required field in order to complete the service. If the logged-on user is a medical provider, the *Provider* field defaults to the logged-on user. If the logged-on user is not a provider listed on the *Provider* drop-down list, the user is prompted with *<select provider>*.

Electronic Medical Business Operations System (EMBOS®)
Service Form For Test Purposes Only

Name: Joseph (First) W (Middle) Demo (Last) **Patient Quick Links ▼ Patient ID:** 11641

Birth Date: 7/4/1961 **Age:** 50 **Gender:** Male **Race:** Asian America **SSN:** 201-10-9151

Organization: Unknown **Home Phone:** () - - **User ID:** 30915

Comp Job Title: **Work Phone:** () - -

Procedure: Desensitization **Comments:** **Service #:** 127248

Facility: SRS Occupational Health Services **Start Date:** 9/15/2011 **Provider:** < select provider > **Status:** In Process

Curr Service Date: 9/15/2011 **Start Time:** 9:15 AM

Buttons: Save, Save & Exit, Close

Fitness for Duty

The Fitness for Duty module in EMBOS provides clinicians a set of tools to document and follow up evaluation or assessment of employees' fitness for duty sessions. Clinicians can identify, recommend, and record patients' work restrictions. Restrictions are categorized in two types; *Temporary Restriction* and *Permanent Restriction*. Temporary restrictions have a start date and an end date. Permanent restrictions have a start date and no end date.

A patient's prior *Health Assessment* or *Physical Exam* can be explicitly associated with the current *Fitness for Duty* episode by selecting one of the past visits from the *Assessment* drop-down list. The *Assessment* drop-down list displays all of the health assessments and physical exams that have been performed on or before the current date of service.

The *Current Duty Status* field represents the current state of an employee's work status. Valid values are *Fit for Duty*, *Sent off Work*, and *Remain off Work*. The valid values displayed in the drop-down list depend on the duty status of the previous evaluation.

A restriction may have a reevaluation date attached. Please notice that the *Reevaluation Date* is stored and paired with the entire *Fitness for Duty* service. It has no bearing on when any of the restrictions end.

Procedure: Comments: Service #:

Facility: Start Date: Provider:

Curr Service Date: Start Time: Status:

Assessment: Email Notifications:

Curr Duty Status: Re-Eval Date:

Duty Restrictions Start Date ☐ End Date ☒ Date to be Applied:

Select	Mode	Type	Source	Description	Start Date	End Date	Re-Eval Date
☐	New	Temp	Non-Occ Illness	Avoid Pulmonary Irritants	<input type="text" value="9/19/2011"/>	<input type="text" value="9/30/2011"/>	<input type="text" value="10/3/2011"/>
☐	New	Temp	Health Evaluation	Limit respirator use to face mask	<input type="text" value="9/19/2011"/>	<input type="text"/>	<input type="text" value="10/3/2011"/>

Temp
Perm

Occ Injury
Occ Illness
Non-Occ Injury
Non-Occ Illness
Health Evaluation
Other

Fit for Duty
Sent Off Work
Remain Off Work
On Medical Hold

To add a restriction, click on the green plus sign icon on the *Duty Restrictions* menu bar. A *Base Restriction Select Form* dialog appears. Select base restriction(s) from the pick list and click the *OK* button. Multiple base restrictions can be selected by holding the *Ctrl* key while picking distinct restrictions from the list. Use the *Shift* key to select a range of restrictions that are listed consecutively. Although same base restriction can be added multiple times to a single list of an employee's *Duty Restrictions*, users should make sure that the combinations of information added are unique.

Base Restrictions List

Avoid bending back or neck greater than 45 degrees r

Avoid carrying

Avoid carrying greater than 10 lbs

Avoid carrying greater than 35 lbs

Avoid carrying greater than 50 lbs

Avoid climbing (arms and legs)

Avoid climbing (legs only)

Avoid climbing (legs only) greater than 3 min at a time

Avoid climbing (legs only) more than hourly

Avoid climbing (legs) more than occasionally

Avoid conditions that permit exposure of wound site to

Avoid crawling

Avoid crawling more than hourly

Avoid crawling more than occasionally

Avoid crouching / squatting

Avoid crouching / squatting greater than 2 hr / shift

Hold *Ctrl* key + Select
Multiple Restrictions

To modify the *Start Date* or *End Date* field, enter a date or pick one from the calendar tool and click the button. The row(s) of restrictions with the *Select* column marked will be updated.

Start Date	End Date	Re-Eval Date
9/19/2011	9/30/2011	
9/19/2011	9/30/2011	

Update One Record Update All Records

To remove restriction(s), mark one or more check boxes in the *Select* column and click on the red minus sign icon. The restriction(s) are not removed from the EMBOS database until the *Fitness for Duty* service is saved.

Select	Mode	Type
☒	New	Temp
☐	New	Temp
☒	New	Temp

Dates and Form Rules

- The *Start Date* field is a required field.
- A new *Fitness for Duty* service cannot be created if an existing *Fitness for Duty* service exists that is not completed.
- *Fitness for Duty* services must be created or entered in chronological order; i.e., a new *Fitness for Duty* service cannot be created if an existing *Fitness for Duty* service has a service date that is later than the one being created.
- Completed *Fitness for Duty* services cannot be modified or deleted.

Medication Evaluation

The Medication Evaluation module allows providers to start the medication reconciliation process by documenting a list of prescribed and dispensed medications from the facility, as well as medications which patients reported taking. Providers can also link a related health assessment or physical exam to the *Medication Evaluation* service record.

Procedure: Medications Evaluation Comments: Service #: 127252

Facility: SRS Occupational Health Services Start Date: 9/16/2011 Provider: Dowray, Ramesh A

Curr Service Date: 9/16/2011 Start Time: 3:46 PM Status: In Process

Assessment: Clinical Evaluation performed on 9/15/2011 at 3:05 PM by Blazer, Ruth A

Medications Evaluated: ☐ Apply All

Type	Description	Dosage	Start Date	Stop Date	Created By	Create Date	Evaluated	Eval Date	Evaluated By
Dispensed	Acetaminophen 325 mg tab	325 mg As Needed	9/26/2011		Mulligan, Buggy W	10/2/2011	☒	9/16/2011	Dowray, Ramesh A
Dispensed	Amoxicillin trihydrate 500 mg caps	500 mg Twice a Day	9/16/2011		Mulligan, Buggy W	10/2/2011	☐		
Reported	Metoprolol	25 mg Twice a Day	1/1/2010		Mulligan, Buggy W	10/2/2011	☐		
Reported	Aspirin	81 mg Once a Day	5/1/2005		Mulligan, Buggy W	10/2/2011	☐

Reported / Dispensed

Related Assessment/Evaluation Service

Currently, EMBOS categorizes medications into two types; *Reported* and *Dispensed*. *Reported Medications* are prescriptions and over-the-counter medications patients are taking. *Dispensed Medications* are medications that the facility has given to the patients.

Reported Medication Form

Medication ID: 37804

Medication Description: Metoprolol

Dosage: 25 milligram Start Date: 1/1/2010

Frequency: Twice a Day Stop Date:

Before Meals Once a Week Once Every Day
 Monthly Twice a Week At Bedtime Every Hour
 Every 4 Hours Once a Day After Meals 4 Times a Day
 Once a Month Twice a Day As Needed 3 Times a Day
 Twice a Month As Directed Every 2 Hours

Dispensed Medication Form

Medication Description: Amoxicillin trihydrate 500 mg caps Amoxil		Dispensed Medication ID: 37803
Dosage: 500 milligram	Dispensed Date: 9/16/2011	
Frequency: Twice a Day	Dispensed Time: 4:15 PM	
Ordered By: Cosby, Otis	Start Date: 9/16/2011	
Dispensed By: Underwood, Nancy U	Stop Date:	
Dispensed Amount: 20 capsule		

To add a medication to the list, click the icon for *Reported Medication* or the icon for the *Dispensed Medication*. The *Drug Select Form* appears. The drug list is presented in an expandable folders format and sorted in alphabetical order. Select a medication from the list and click the *OK* button. Depending on what category of the medication recorded, the *Reported Medication* or the *Dispensed Medication Form* is opened accordingly. Record the dosage, frequency, amount, provider, and *Save* the form.

Electronic Medical Business Operations System (EMBOS®)
Drug Select Form For Test Purpos

Drug List (Y12 Formulary)

- + H
- I
 - Ibuprofen 200 mg tab - Advil
 - Ibuprofen 200 mg tab - Motrin
 - Ibuprofen 800 mg tab - Motrin
 - Influenza vaccine
 - Insta-Glucose - Glucose NF 31gm tube
 - Ipecac syrup 30 ml btl
- + J
- + K
- L
 - Lactated Ringer's IV sol 1000 ml bag
 - Lidocaine 0.4% & dextrose 5% 500 ml bag
 - Lidocaine 1% & epinephrine 1:100000 50 ml vial
 - Lidocaine 1% 10 ml vial - Xylocaine

All Columns are Sort able

Update All Records

Medications

Evaluated: ☐ Apply All

Type	Description	Dosage	Start Date	Stop Date	Created By	Create Date	Evaluated	Eval Date	Evaluated By
Dispensed	Amoxicillin trihydrate 500 mg caps	500 mg Twice a Day	9/16/2011		Mulligan, Buggy W	10/2/2011	☒	9/16/2011	Dowray, Ramesh A
Reported	Metoprolol	25 mg Twice a Day	1/1/2010		Mulligan, Buggy W	10/2/2011	☐		
Reported	Aspirin	81 mg Once a Day	5/1/2005		Mulligan, Buggy W	10/2/2011	☐		
Dispensed	Acetaminophen 325 mg tab	325 mg As Needed	9/16/2011	9/19/2011	Mulligan, Buggy W	10/2/2011	☒	9/16/2011	Dowray, Ramesh A

Program Evaluation

A Program Evaluation module allows providers to document evaluation or assessment whether or not employees have met the medical requirements for all programs they are currently enrolled in. Certain program enrollments are prepopulated into employees' records. Users can select programs from the list of available enrollments of each employee.

Procedure: Program Evaluation Comments: Service #: 127253

Facility: SRS Occupational Health Services Start Date: 9/19/2011 Provider: Foster, Gloria B

Curr Service Date: 9/19/2011 Start Time: 8:00 AM Status: In Process

Supporting Assessment: Physical Exam performed on 9/15/2011 by Cosby, Otis

Program Evaluations

Set Eval Type to New/Renewal:

Select Program	Freq	Cert-Qual Status	Eval Type	Effective Date	Qualifying Exams
☐ Respirator Clearance - 1 Year (Annual)	1 Year	Yes	Status Update	9/19/2011	
☐ Beryllium Worker Program	1 Year	Hold	New Issue/Renewa	9/19/2011	

Yes
Yes With Restrictions
Hold
No

Status Update
New Issue/Renewal

To add a program, click on the green plus sign icon on the Program Evaluations menu bar. The *Program Enrollments Select* Form appears. Select one or more programs by marking on the check boxes in the *Select* column and click the OK button.

Electronic Medical Business Operations System (EMBOS®)
Program Enrollment Select Form For Test Purposes Only

■ **Program Enrollments for:** Edna Demo as of 9/19/2011 8:00 AM ☐ Select / DeSelect All

Select	Program	Start Date	Stop Date	Current Status	Effective Date
☒	Beryllium Worker Program	10/1/2011		Hold	9/19/2011
☒	HRP - Human Reliability Program	8/1/2011			
☐	Hearing Conservation Program	7/1/2011			
☒	Respirator Clearance - 1 Year (Annual)	10/1/2011		Yes	9/19/2011

NOTE: Programs highlighted in yellow have future start dates.

A past *Physical Exam* or *Health Assessment* can be linked to the *Program Evaluation* service by choosing from the drop-down list. The *Supporting Assessment* drop-down list displays a list of all Assessments and Physicians Exams that have been performed on the patient prior to the current service date. Selecting an Assessment or Physicians Exam will explicitly associate the selected Assessment or Physicians Exam to the Program Evaluation service.

Supporting Assessment Physical Exam performed on 9/15/2011 by Cosby, Otis ▼

■ **Program Evaluations** Set Eval Type to New/Renewal:

Select Program	Freq	Cert-Qual Status	Eval Type	Effective Date	Qualifying Exams
☐ Respirator Clearance - 1 Year (Annual)	1 Year	Yes ▼	Status Update ▼	9/19/2011
☐ Beryllium Worker Program	1 Year	Hold ▼	New Issue/Renewa ▼	9/19/2011
☐ HRP - Human Reliability Program	1 Year	<select status> ▼	<select type> ▼

A new *Program Evaluation* service cannot be created if a previous *Program Evaluation* service exists that is not completed. *Program Evaluation* services must be created in chronological order; i.e., a new *Program Evaluation* service cannot be created if an existing *Program Evaluation* service has a service date that is later than the one being created. Completed *Program Evaluation* services cannot be modified or deleted.

Tuberculosis Skin Test

The Tuberculosis Skin Test module captures the events of patients' TB tests and results. There are two tabs on the *Tuberculosis Skin Test* form which allow entry of injection specific information as well as results of the TB test.

Procedure: Tuberculosis Skin Test Comments: Service #: 128236

Facility: SRS Occupational Health Services Start Date: 9/19/2011 Provider: Dylan, Allison J

Curr Service Date: 9/19/2011 Start Time: 9:15 AM Status: In Process

Verified By: < select provider > Date Verified:

Injection Info TB Results

Manufacturer: Merck & Co., Inc. Brand Name: TB 2000 Expiration Date: 8/3/2013

Strength: 1 Dosage: 2 cc Lot #: 103

Injection Site: Left Forearm Route of Administration: Intracutaneous

Ordered By: Thomas, Sula

Adverse Reaction:

Left Arm
 Left Deltoid
 Left Forearm
 Left Gluteal
 Right Arm
 Right Deltoid
 Right
 Forearm
 Right Gluteal

Intracutaneous
 Intramuscular
 Subcutaneous

In order for a *Tuberculosis Skin Test* service to be completed, the *Verified By* and *Verified Date* fields are both required. The normal range of result values displays when users mouse hover the icon. Positive results are highlighted in red.

Procedure: Tuberculosis Skin Test Comments: Service #: 128236

Facility: SRS Occupational Health Services Start Date: 9/19/2011 Provider: Dylan, Allison J

Curr Service Date: 9/19/2011 Start Time: 9:15 AM Status: In Process

Verified By: Thermal, Josh Date Verified: 9/22/2011

Injection Info TB Results

Induration Positive

Induration Size 12 mm Red and Warm to Touch

Normal Range:
 0 to 10 mm

HRP Psychological Report

The Psychological Evaluation Procedures modules in EMBOS provide ability for clinicians to document a wide range of mental measurements of employees. The *Human Reliability Program (HRP) Psychological Report* service is one of the test measurements providers use to capture psychological evaluation and report histories.

Procedure: HRP Psychological Report **Comments:** **Service #:** 128238
Facility: SRS Occupational Health Services **Start Date:** 9/19/2011 **Provider:** Monday, Alieshia
Curr Service Date: 9/19/2011 **Start Time:** 10:45 AM **Status:** In Process

Evaluation Components Evaluation

Supporting Services:

Service #	Start Date	Start Time	Description	Provider	Status
128237	9/19/2011	10:30 AM	Structured Interview Survey	Stacey M Lyell	Completed

The *Psychological Findings and Recommendations Form* contains two tabs. The first tab, *Evaluation Components*, contains a list of services which have been linked to the Psychological Evaluation as supporting services. A *supporting service* is any existing service which provides the provider information to make an analysis or evaluation. To add supporting services, click on the green plus sign button on the tab toolbar. The *Event Relationship Manager Form* appears. Select one or more of the available services listed on the left-hand-side of the form, *Patient Services* list, and click on the green greater than sign button to move the service(s) into the list of *Services to Associate*. Then click on the OK button. It is important to note that the supporting services are not persistent until a subsequent save of the *Psychological Evaluation Form* has occurred.

Electronic Medical Business Operations System (EMBOS®)
 Event Relationship Manager Form For Test Purposes Only

Patient Services

- 128236 - Tuberculosis Skin Test: 9/19/2011 9:15:00 AM
- 127736 - Beryllium LPT: 10/6/2011 11:30:00 AM
- 127253 - Program Evaluation: 9/19/2011 8:00:00 AM
- 127252 - Medications Evaluation: 9/16/2011 3:46:00 PM
- 127251 - Fitness For Duty: 9/19/2011 8:00:00 AM
- 127250 - Diagnoses Evaluation: 9/16/2011 3:46:00 PM
- 127247 - Diagnoses Evaluation: 9/15/2011 3:30:00 PM
- 127246 - Physical Exam: 9/15/2011 3:15:00 PM
- 127244 - Desensitization: 9/15/2011 3:10:00 PM
- 127243 - Clinical Evaluation: 9/15/2011 3:05:46 PM
- 127242 - Beryllium LPT: 9/15/2011 3:05:46 PM
- 127241 - Check Vitals: 9/15/2011 3:05:46 PM
- 127238 - Beryllium Assessment: 9/15/2011 3:05:46 PM

Filter

Service Types: <All>

Services to Associate

- 128239 - Mental Status Review: 9/19/2011 10:30:00 AM

The second tab, *Evaluation*, is a template that helps providers document HRP psychological assessments. The fields in the template include;

- Job Description Statement
- Job Task Analysis
- Alcohol and Drug Use
- Financial Concerns
- Honesty
- Arrests & Convictions
- Social Conformance
- Vulnerability to Coercion
- Psychological Stability
- Other Findings
- Recommended Restrictions

Evaluation Components	Evaluation
Job Description Statement:	INSERT TEXT WITH BRIEF DEMO AND JOB DESCRIPTION STATEMENT.
Job Task Analysis:	I have reviewed the Essential Job Function Analysis form and am familiar with the Job Description for this individual. The employee denies any difficulties with the physical or cognitive demands of the job.
Alcohol and Drug Use:	INSERT WITH FACTUAL ALCOHOL STATEMENT. There is no evidence of past or present abuse or dependence on alcohol, prescription medication, or street drugs. This individual denies any use of hallucinogens or having any flashbacks during the five years prior to this evaluation.
Financial Concerns:	No reported evidence to cause concern in this area.
Honesty:	Employee answered all questions directly and without hesitation. No evidence of withholding information or providing misinformation.
Arrests & Convictions:	None reported.
Social Conformance:	Employee appears to conform to societal and occupational norms and expectations. No

Evaluation Components	Evaluation
Honesty:	Employee answered all questions directly and without hesitation. No evidence of withholding information or providing misinformation.
Arrests & Convictions:	None reported.
Social Conformance:	Employee appears to conform to societal and occupational norms and expectations. No evidence of problematic personal or occupational relationships.
Vulnerability to Coercion:	No atypical vulnerability identified.
Psychological Stability:	No evidence from psychological testing, clinical interview, or structured interview survey indicating psychological impairment. Performed adequately on cognitive screen; no sign of cognitive dysfunction. Mental status was within normal limits.
Other Findings:	None.
Recommended Restrictions:	There were no new restrictions in work activities indicated.

MMPI-2 RF Psychological Procedure

The EMBOS Psychological Assessment module adopted one of the most frequently used personality tests in mental health, the MMPI-2 RF. The *Minnesota Multiphasic Personality Inventory-2 Restructured Form* is a 338-item self-report measure linked conceptually and empirically to modern theories and models of psychopathology and personality. The *MMPI-2 RF* form contains three tabs. The first tab, *Edit Results*, captures the discrete results. The 338 items MMPI-2 RF consists of 51 scales.

- (9) Validity
 - (3) Higher-Order
 - (9) Restructured Clinical
 - (5) Somatic/Cognitive
 - (9) Internalizing
 - (4) Externalizing
 - (5) Interpersonal
 - (2) Interest
 - (5) Personality Psychopathology
- Five

Psych Test: Comments: Service #:

Facility: Start Date: Provider:

Curr Service Date: Start Time: Status:

Invalid: ☐

Edit Results	Import Results	Attached Files
L-r	51	BRF
K-r	62	MSF
VRIN-r		RC2
TRIN-r		SUI
CNS	8	HLP
F-r		SFD
Fp-r	43	NFC
Fs		RC4
FBS-r		JCP
BXD		SUB

Display valid range of numeric values when mouse hovered

Measuring Scales, e.g.:
 Fs – Infrequent Somatic Responses
 FBS-r – Symptom Validity
 BXD – Behavioral / Externalizing Dysfunction

All of the test scales must have values before the *MMPI-2 RF* form can be marked as completed.

The second tab, *Import Results*, provides users with the ability to upload existing test results from other software packages. Result files with proper format can be uploaded onto the service record by using the **Browse...** button to locate the files from users' local or network drives.

After selecting a file, click on the **Upload** button to link the file to the service. Repeat the steps for multiple result files.

The screenshot shows a service form for 'Psych Test: MMPI-2 RF'. The 'Facility' is 'SRS Occupational Health Services', 'Start Date' is '9/19/2011', 'Start Time' is '11:15 AM', 'Provider' is 'Logan, Susan P', and 'Status' is 'In Process'. The 'Service #' is '128240'. Below the form, there are three tabs: 'Edit Results', 'Import Results', and 'Attached Files'. The 'Import Results' tab is active, showing a text input field with 'MMPI_Report_Excel.xlsx' and two buttons: 'Browse...' and 'Upload'. The 'Browse...' and 'Upload' buttons are highlighted with a red rectangle.

The third tab, *Attached Files*, contains a list of files which have been uploaded and linked to the open service. A service must be saved prior to adding any attachments. Below is a sample image of an *MMPI-2 RF* service with multiple files attached.

The screenshot shows the 'Attached Files' tab for a service. It displays a table of files attached to ID 17179. The table has three columns: 'File ID', 'File Name', and 'Upload Date Time'. There are seven rows of data, each with a file icon to the right.

File ID	File Name	Upload Date Time
51	unique_MMPI_Scale.txt	4/9/2008 4:25:38 PM
54	MMPI_results_readable.xls	4/9/2008 4:46:50 PM
55	MMPI_results.pdf	4/9/2008 4:47:32 PM
56	mmpi_stuff.zip	4/9/2008 4:56:10 PM
72	mmpi_stuff.doc	4/10/2008 8:28:33 AM
73	mmpi_stuff.ppt	4/10/2008 8:29:24 AM
74	mmpi_stuff.rtf	4/10/2008 8:30:41 AM

The file name must be unique to a particular service. In other words, a service cannot have two files with the same name and type attached.

The MMPI service can produce an interpretation report. Users can view and print MMPI test results by clicking on the *MMPI Results* option from the form *Reports* menu.

Electronic Medical Business Operations System (EMBOS®)
MMPI-2 RF

File Reports

MMPI Results

Name: (First) (Middle) (Last)

L Demo

Electronic Medical Business Operations System (EMBOS)
 SRNS Medical Department
MMPI-2 RF Report

Printed On: 10/15/2011 5:39:48 pm Page 1 of 2

Session ID: 01001 Organization: Org Code:

DEFENSIVENESS INDICES			
scale	Obtained TGT-Score	Positive Cut-Off	Meaning
L-r (rf)	51	75	Review results for risk factors
K-r (rf)	62	73	Review results for risk factors
NON-RESPONSIVENESS			
scale	Obtained TGT-Score	Positive Cut-Off	Meaning
VRIN-r (rf)	72	80	Likely thoughtful responding
TRIN-r (rf)	4	80	Likely thoughtful responding
CNS (rf)	15	10	REVIEW SKIPPED ITEMS; CONSIDER ADMIN OF SKIPPED ITEMS
INFREQUENT RESPONDING			
F-r (rf)	40	53	Unlikely random/fixed/changed responding
Fp-r (rf)	-12	53	Unlikely random/fixed/changed responding
Fs (rf)	39	58	Unlikely random/fixed/changed responding
FBS-r (rf)	51	60	Unlikely random/fixed/changed responding
POTENTIAL RISK FACTORS			
scale	Obtained TGT-Score	Positive Cut-Off	Meaning
ANGER - AGGRESSION			
BXD (rf)	33	53	Unlikely impairing anger control problem
RC9 (rf)		52	Unlikely impairing anger control problem
ANP (rf)		51	Unlikely impairing anger control problem
AGG (rf)		51	Unlikely impairing anger control problem
ACT (rf)		54	Unlikely impairing anger control problem
AGGR-r (rf)		60	Unlikely impairing anger control problem
DISC-r (rf)		56	Unlikely impairing anger control problem
ANXIETY - DYSFUNCTIONAL DISTRESS			
K-r (rf)	62	<49	Unlikely impairing anxiety
EID (rf)		51	Unlikely impairing anxiety
RCd (rf)		50	Unlikely impairing anxiety
RC7 (rf)		51	Unlikely impairing anxiety
STW (rf)		52	Unlikely impairing anxiety
AXY (rf)		51	Unlikely impairing anxiety
IPP (rf)		66	Unlikely impairing anxiety
NEGE-r (rf)		50	Unlikely impairing anxiety
HARM - AVOIDANCY			
BRF (rf)	40	53	Unlikely impairing fears
MSF (rf)	55	62	Unlikely impairing fears
DEPRESSION			
EID (rf)		51	Unlikely impairing depression
RCd (rf)		50	Unlikely impairing depression
RC2 (rf)	23	59	Unlikely impairing depression
RC9 (rf)		<39	RULE-OUT IMPAIRING DEPRESSION
SUI (rf)	0	53	Unlikely impairing depression
HLP (rf)	73	53	RULE-OUT IMPAIRING DEPRESSION

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 exemption number and category: 5, Internal Privacy. Department of Energy review required before public release

OFFICIAL USE ONLY

X-Ray Procedures

The X-Ray Procedures service in EMBOS records the events of x-ray images taken at the OH facility, readings and interpretations of the x-ray images by radiologist(s), and the internally used summary codes assessed by the OH clinician(s). The *X-Ray Service Form* appears when users select and add an x-ray service from the *Medical Procedures List* in the *Activity Select Form*. The *Requested By* field is required before the x-ray service can be saved. The *Requested By* field represents the provider who placed orders for the x-ray procedures. The *Provider* field represents the provider who performed the service. It is required before the x-ray service can be marked as completed.

Procedure: X-Ray Procedure - Chest Comments: Service #: 128241

Facility: SRS Occupational Health Services Start Date: 9/19/2011 Provider: Reynolds, Russ

Curr Service Date: 9/19/2011 Start Time: 11:45 AM Status: In Process

Film Count: 3

Requested By: Sproles, Becky S

Interpretations Summaries

Radiology Interpretations

Report ID	Date	Lab	Radiologist
8608	9/21/2011	Oak Ridge Medical Imaging	Hilton, James

After a radiologist reads the film(s) and gives the interpretations, the radiology report is sent to the OH facility to be recorded into EMBOS. To add an interpretations report, click on the blank page button on the *Interpretations* tab toolbar. The content of the radiology report can be added into the *Radiology Report* field. One or more reports can be added to an x-ray service. The *Radiologist* drop-down field stores the name of the radiologist who read and produced the radiology report.

Procedure: X-Ray Procedure - Wrist (Registered on: 9/19/2011 at 11:45 AM) Interpretation ID: 9108

Radiologist: Ridings-Hesser, Sandra - Oak Ridge Medical Imaging Report Date: 9/22/2011

Radiology Report

HANDS AND WRISTS - TWO VIEWS:
 Hands and wrists, two views of the right and left hand and wrist were obtained. There is generalized osteopenia. There are OA changes seen at the first CMC joint with subchondral sclerosis and joint space narrowing. Ulnar styloids appear intact. There is no chondrocalcinosis. There are some degenerative changes seen at the carpus but without any obvious erosive changes. There are no erosions seen at any of the MCP or PIP joints. There are scattered areas of joint space narrowing at the PIP and DIP joints.

IMPRESSION:
 1. Osteoarthritis changes.
 2. Osteopenia.
 3. No definite erosions.

The x-ray procedure summaries are added to the service by clicking on the green plus sign button on the *Summaries* tab toolbar. Users can select one or more summaries to be added to the x-ray service. The *X-Ray Summary Select Form* dialog appears. Use the *Shift + Left Click* to select multiple summaries in a row. Use the *Ctrl + Left Click* to select multiple discrete summary codes. Then click on the *OK* button to attach the summaries to the x-ray service form.

Electronic Medical Business Operations System (EMBOS®)
X-Ray Summary Select Form For Test F

Summary Codes:

001. No Active Chest Disease
002. No Significant Change. No Active Chest Disease.
003. Healed Calcific Granulomatous Lung Disease
004. Borderline Cardiomegaly
005. Pleural Plaques
006. Interstitial Fibrotic Changes
007. Pulmonary Fibrosis
008. Plate-Like Atelectasis
009. Bilateral Hilar Adenopathy

Hold *Ctrl* key + Select Multiple Summaries

To remove a summary record attached to an x-ray service, highlight one of the summaries and click on the red minus sign button on the *Summaries* tab toolbar. The selected row is removed without any pop-up confirmation dialog. The summary record is not removed from the database until users click on the *Save* or the *Save & Exit* button of the *X-Ray Service Form*.

Interpretations Summaries

X-Ray Summaries

Code	Description
001	No Active Chest Disease
217	Normal Chest for Age

SOMD Workstation

The SOMD Workstation module in EMBOS provides the *Site Office Medical Director (SOMD)* with a set of tools to review medical activities provided to personnel enrolled in the *Human Reliability Program (HRP)*. Regulation requires the Site Office Medical Director to review Medications, Fitness for Duty, and Charts of employees who are enrolled in the HRP program. A set of forms in EMBOS gather clinical services performed by clinicians who are not in the SOMD role and present them in the *SOMD Workstation*. From the *SOMD Workstation Home Page*, SOMD has options to perform *Medications Review*, *Duty Evaluations Review*, and *Chart Review*.

HRP Medications Review

The *SOMD HRP Medications Review Form* dialog appears when users choose the *HRP Medications Review* option from the *SOMD Reviews* menu of the *SOMD Workstation Home Page*. The form lists medication evaluation services completed by medical providers other than the SOMD.

Electronic Medical Business Operations System (EMBOS®)
SOMD HRP Medications Review Form For Test Purposes Only

Review Date: 10/16/2011 Reviewed By: Cosby, Otis

HRP Program - Newly Evaluated Medications ☐ Yes ☐ No ☒ Defer

Create Date	Type	Drug	Dosage	Start Date	Stop Date	Evaluated By	Eval Date	Concur Yes-No-Defer
Demo, Joseph W Badge Num: EMR HRP Enrollment Period: 9/18/2011 to Open								
10/16/2011	Dispensed	Amoxicillin trihydrate 500 mg caps	1000 mg Twice a Day	10/6/2011		Reynolds, Russ	10/6/2011	☒ ☐ ☐
9/18/2011	Reported	Aspirin	80 mg Once a Day	1/1/1990		Reynolds, Russ	10/6/2011	☒ ☐ ☐
9/18/2011	Reported	Lipitor	10 mg Once a Day	5/1/2008		Reynolds, Russ	10/6/2011	☐ ☐ ☒
9/18/2011	Reported	Lasix	20 mg Twice a Day	1/1/2009		Reynolds, Russ	10/6/2011	☐ ☒ ☐
Demo, Edna L Badge Num: EMR HRP Enrollment Period: 8/1/2011 to Open								
10/16/2011	Dispensed	Guaifenesin 100 mg & Dextromethorphan Hydrobromide 10 mg 120 ml btl	400 mg 4 Times a Day	10/10/2011	11/10/2011	Fortney, Robert	10/10/2011	☒ ☐ ☐
10/2/2011	Reported	Aspirin	81 mg Once a Day	5/1/2005		Fortney, Robert	10/10/2011	☒ ☐ ☐
10/2/2011	Reported	Metoprolol	25 mg Twice a Day	1/1/2010		Fortney, Robert	10/10/2011	☐ ☐ ☒

It is important to note that all reported and dispensed medications are evaluated by medical providers, but only medications for patients in the HRP program require review by the SOMD. After the *SOMD HRP Medications Review* form is saved, the list of evaluated medications is refreshed. The new list displays only the medications which SOMD has marked as “Defer”.

Demo, Joseph W		Badge Num:		<div>EMR</div>	HRP Enrollment Period: 9/18/2011 to Open					
Create Date	Type	Drug	Dosage	Start Date	Stop Date	Evaluated By	Eval Date	---Concur--- Yes-No-Defer		
9/18/2011	Reported	Lipitor	10 mg Once a Day	5/1/2008		Reynolds, Russ	10/6/2011	<div><div></div><div></div><div></div></div>		
Demo, Edna L		Badge Num:		<div>EMR</div>	HRP Enrollment Period: 8/1/2011 to Open					
Create Date	Type	Drug	Dosage	Start Date	Stop Date	Evaluated By	Eval Date	---Concur--- Yes-No-Defer		
10/2/2011	Reported	Metoprolol	25 mg Twice a Day	1/1/2010		Fortney, Robert	10/10/2011	<div><div></div><div></div><div></div></div>		

HRP Duty Evaluations Review

The Duty Evaluation module for SOMD provides users with a documentation process to be compliant with the required regulation to review Fitness for Duty services and their associated work restrictions for personnel enrolled in the Human Reliability Program (HRP). The *HRP Fitness for Duty Review Form* lists fitness for duty services completed by medical providers other than the SOMD. The form displays only records of all patients who enrolled in the HRP program.

Electronic Medical Business Operations System (EMBOS®)
 HRP Fitness for Duty Review Form For Test Purposes Only

Review Date:
 Reviewed By:

HRP Fitness for Duty Services/Restrictions List

☐ Yes
 ☐ No
 ☒ Defer

Demo, Joseph W		Badge Num: <input type="text" value="EMR"/>		HRP Enrollment Period: 9/18/2011 to Open					
Service ID	Procedure	Duty Status	Service Date	Service Time	Provider	---Concur--- Yes-No-Defer			
128247	Fitness For Duty	Fit For Duty	10/6/2011	03:30	Blazer, Ruth Ann	☐	☐	☒	
Mode	Type	Restriction			Start Date	Stop Date			
New	Temporary	Work At Own Pace			Oct-06-2011				
New	Temporary	Avoid lifting greater than 50 lbs Lower Back Pain			Oct-06-2011				
New	Permanent	No Working Alone			Oct-06-2011				
Demo, Edna L		Badge Num: <input type="text" value="EMR"/>		HRP Enrollment Period: 8/1/2011 to Open					
Service ID	Procedure	Duty Status	Service Date	Service Time	Provider	---Concur--- Yes-No-Defer			
128248	Fitness For Duty	Fit For Duty	10/6/2011	11:30	Lewis, Martha M	☐	☐	☒	
Mode	Type	Restriction			Start Date	Stop Date			
New	Permanent	Minimize Repetitive Motion Of: Left Wrist			Oct-06-2011				
Carry Forward	Temporary	Limit respirator use to face mask			Sep-19-2011				

Site Office Medical Directors can view the detail of each service listed by simply clicking on the **EMR** button located at each of the patient header bars. Optionally, the same review decision of *Yes*, *No*, or *Defer* can be set to all of the records on the list by using the **Apply All** button.

Chart Reviews

The Chart Reviews module in *SOMD Workstation* provides users with the ability to view HRP patients' *Physical Exams* that have been completed by medical providers other than the Site Office Medical Directors. The *Chart Review Form* lists all of the *Physical Exam* services that have not been reviewed and commented on by the SOMD. The list is cleared after all of the HRP Physical Exam services are marked as concurred or not concurred.

Electronic Medical Business Operations System (EMBOS®)
Chart Review Form For Test Purposes Only

Review Date: 10/16/2011 Reviewed By: Cosby, Otis

SOMD Chart Review List ☐ Yes ☐ No ☒ Defer **Apply All**

Whitaker, Robert Badge Num:

Reg Event ID	Service ID	Procedure	Service Date	Service Time	Patient	Badge Number	
64713	77249	Physical Exam	3/10/2010	12:17	Mulligan, Bussy		<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">EMR</div> <div style="border: 2px solid red; padding: 2px;"> <div style="text-align: center; font-size: 0.8em;">---Concur---</div> <div style="display: flex; justify-content: space-around;"> Yes No Defer </div> </div> </div>

SOMD Workstation Reports

The report module in the *SOMD Workstation* provides users with summary and detail review reports. The available reports include the following:

- Medications Evaluation Review Detail Report
- Duty Evaluation Review Detail Report
- Chart Review Annual Report
- Chart Review Detail Report
- Metric Reports – Ave Visit Times

The *Detail Report Select Form* dialog appears when choosing a detailed report from the *Reports* menu. There are four data fields available to use for filtering information displayed on the report: *Begin Date*, *End Date*, *Performing Provider*, and *Reviewing Provider* (SOMD). When finished entering the filters, click on the **Generate Report** button. The report is generated in PDF format. Users can choose to print or save the report as a PDF file.

Electronic Medical Business Operations System (EMBOS®)
Medications Evaluation Detail Report Select Form

Include Data for Medications Created During the Period:

Begin Date: 9/1/2011

End Date: 10/31/2011

Provider: [Dropdown]

Reviewer: Dowray, Ramesh A [Dropdown]

List of Site Office Medical Directors

Sample SOMD Reports

Electronic Medical Business Operations System (EMBOS)

SRNS Medical Department

Medication Eval Review Detail Report

Printed On: 10/16/2011 5:18:00 pm

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Medications Evaluations for Medications created between 9/1/2011 and 10/31/2011 concurred by Ramesh A

Dowray.

Demo, Edna L

Badge No.

Type	Medication Description Dosage	Start Date Stop Date	Created Date Created By	Evaluated Date Evaluated By	Concur Date Concurred By	Result
Reported	Aspirin 81 mg Once a Day	5/1/2005	10/2/2011 Mulligan, Bugsy W	10/10/2011 Fortney, Robert	10/16/2011 Dowray, Ramesh A	Y
Dispensed	Guaifenesin 100 mg & Dextromethorphan Hydrobromide 10 mg 120 ml btl 400 mg 4 Times a Day	10/10/2011 11/10/2011	10/16/2011 Mulligan, Bugsy W	10/10/2011 Fortney, Robert	10/16/2011 Dowray, Ramesh A	Y

Demo, Joseph W

Badge No.

Type	Medication Description Dosage	Start Date Stop Date	Created Date Created By	Evaluated Date Evaluated By	Concur Date Concurred By	Result
Reported	Lasix 20 mg Twice a Day	1/1/2009	9/18/2011 Mulligan, Bugsy W	10/6/2011 Reynolds, Russ	10/16/2011 Dowray, Ramesh A	N
Reported	Aspirin 80 mg Once a Day	1/1/1990	9/18/2011 Mulligan, Bugsy W	10/6/2011 Reynolds, Russ	10/16/2011 Dowray, Ramesh A	Y
Dispensed	Amoxicillin trihydrate 500 mg caps 1000 mg Twice a Day	10/6/2011	10/16/2011 Brady, Carol	10/6/2011 Reynolds, Russ	10/16/2011 Dowray, Ramesh A	Y

Electronic Medical Business Operations System (EMBOS)

SRNS Medical Department

Duty Eval Review Detail Report

Printed On: 10/16/2011 5:31:15 pm

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Duty Evaluations for Services provided between 1/1/2011 and 10/31/2011.

Patient	Badge No.	Service Date	Status	Provider	Reviewer	Concur Date	Result
Crane, Frasier		1/6/2011	Completed	Thermal, Josh	Shelton, Patsy M	4/20/2011	Y
Demo, Edna		10/6/2011	Completed	Lewis, Martha M			
Demo, Joseph		10/6/2011	Completed	Blazer, Ruth Ann			
Demo, Mary		10/6/2011	Completed	Underwood, Nancy U	Cosby, Otis	10/16/2011	N
Dylan, Allison		3/1/2011	Completed	Beryllium, Tommy	Shelton, Patsy M	4/20/2011	Y
Dylan, Allison		4/20/2011	Completed	Shelton, Patsy M			
Mead, Tom		9/19/2011	In Process	Sproles, Becky S			
Watson, Matt		3/14/2011	Completed	Thermal, Josh	Shelton, Patsy M	4/20/2011	Y

EMBOS Workstation Views

The EMBOS Workstation Views module allows users to have quick access to medical cases and services at a group level or directly to a particular patient's cases. The module provides three simple ways to view events; *Case Search View*, *Daily Services View*, and *Service Search View*. Each view provides distinct options for users to group events by procedure, provider, activity, service date range, or status. Users can expand or reduce the amount of search results returned by changing search criteria.

Case Search View

A Case Search Form dialog appears after choosing the *Case Search View* submenu from the *Workstation Views* main menu of the EMBOS Home Page. Users can locate a specific group of medical records by Case Number, Patient Identifier, Registration Date Range, Activity, Status, Organization, or a combination of certain search criteria.

 A screenshot of the 'Case Search Form' dialog box. The title bar reads 'Electronic Medical Business Operations System (EMBOS®)' and 'Case Search Form'. In the top right corner, it says 'For Test Purposes Only'. The form contains several input fields and buttons. Callouts point to specific elements:

- A callout points to the 'Activity' dropdown menu, which is currently set to 'all activities >'. The text of the callout is: 'Predefined Lists Ask EMBOS Administrator for updates'.
- A callout points to the 'Status #' dropdown menu, which is currently set to '< all statuses >'. The text of the callout is: 'Optional: Find Patient ID first'.
- A callout points to the 'Follow-Up' and 'New' radio buttons. The text of the callout is: 'Follow-Up' and 'New'.
- A callout points to the 'Search' button on the right side of the form.

 The form also includes fields for 'Case #', 'Registration Date Range' (with 'to' and calendar icons), 'Patient: (User ID or SSN)', and 'Organization: < all organizations >'. At the bottom, there are four buttons: 'Search', 'Report', 'Reset', and 'Close'.

One example of an advanced search is if users are looking for all new annual cases. To get the list of new annual cases, pick *Annual* from the *Activity* drop-down list and pick *New* from the *Status* list, then click on the *Search* button in the middle of the search form. A list of registered *Annual* cases with the status of *New* is displayed on the search results grid at the bottom half section of the *Case Search Form*.

■ Search Results for the criteria specified above

Case#	User ID	Patient	Registration Date	Registration Time	Description	Status
122864	P1200	Shelton, Patsy	9/1/2011	12:29 PM	Annual	New
122866	A0579	Harper, Alan	9/6/2011	12:33 PM	Annual	New
122873	J5049	Kirk, James	9/8/2011	10:40 AM	Annual	New
122886	R4500	Fortney, Robert	9/15/2011	6:04 AM	Annual	New
122889	J8887	Jacobs, Jimmy	9/19/2011	11:16 AM	Annual	New
122892	J8945	Brummett, Jill	9/20/2011	3:59 PM	Annual	New
122893	1ST	Hill, Alice	9/20/2011	2:39 PM	Annual	New
122899	L2187	Shissler, Linda	9/22/2011	4:42 PM	Annual	New
122900	W5274	Wellness, Wellness	9/22/2011	6:15 AM	Annual	New
122903	A7600	Dylan, Allison	4/20/2011	6:30 AM	Annual	New

To start a new search, click on the *Reset* button to clear the results and search criteria. Users have an option to search for the patient's identifier first before searching for the cases of a particular patient. When you click on the top *Search* button (next to the *Patient:* field), the *Patient Search Form* dialog appears (see the *Patient Records* section for detail). Choose a patient from the list of search results of the *Patient Search Form*, then click *OK*. The *User ID* of the selected patient is populated in the *Patient:* field of the *Case Search Form*. Users can choose to click the main *Search* button or add criteria to narrow down the results returned.

If the SSN of a patient is known, enter the SSN without dashes into the *Patient:* field and click on the main *Search* button to go directly to the patient's records. Remember not to use the *Search* button next to the *Patient:* field. It will open the *Patient Search Form* instead of searching for cases of the patient. Use the *Search* button at the middle of the *Case Search Form*.

The screenshot shows a form with the following elements:

- A label "No Dashes" with a blue box pointing to the text "201109151" in the "Patient: (User ID or SSN)" field.
- A "Search" button next to the Patient field, which is crossed out with a red circle and a diagonal line.
- A "Search" button at the bottom left of the form, which is highlighted with a red box.
- Other buttons at the bottom: "Report", "Reset", and "Close".

Daily Services View

The Daily Services View module is another way for EMBOS users to list multiple medical records in a single view. The view lists services records by registered date. This view is similar to the *Services Performed* list in any EMBOS *Workstation*. The main difference is that the *Daily Services View* lists services of multiple patients who registered in the same day. In *Workstation* forms, only service records of a single patient are listed (by selected patient).

Services Performed on: 9/15/2011

Service#	Start Date	Start Time	User ID	Patient	Description	Provider	Status
103175	10/20/2010	9:48 AM	R4500	Fortney, Robert	HRP Psychological Report	Thermal, Josh	In Process
126733	9/15/2011	6:45 AM	R4500	Fortney, Robert	X-Ray Procedure - Chest	Beryllium, Tommy	Completed
126734	9/15/2011	6:04 AM	R4500	Fortney, Robert	Immunization - Influenza	Barbee, Christy	Declined
127234	9/15/2011	6:04 AM	R4500	Fortney, Robert	Check Blood Pressure		In Process
124728	9/15/2011	9:30 AM	J0915	Demo, Joseph	CBC	Shelton, Patsy	Completed
124729	9/15/2011	9:30 AM	J0915	Demo, Joseph	Urinalysis	Lyell, Stacey	Completed
124730	9/15/2011	9:30 AM	J0915	Demo, Joseph	Check Blood Pressure	Lyell, Stacey	Completed
124731	9/15/2011	9:30 AM	J0915	Demo, Joseph	Check Vitals	Lyell, Stacey	Completed
125211	9/15/2011	10:00 AM	J0915	Demo, Joseph	Urine Drug Screen (DOT)	North, Melissa	In Process
125212	9/15/2011	9:45 AM	J0915	Demo, Joseph	X-Ray Procedure - Chest	Shissler, Linda	In Process
127233	9/15/2011	9:15 AM	J0915	Demo, Joseph	Chemistry Panels	Barbee, Christy	Completed

In the list view, users can sort information in each column by clicking on the column header. The sort order is toggled between ascending and descending on each mouse click. The menu options are changed based on the status of each service selected. Completed services can only be viewed

, but not opened for edit.

Click to Sort

Services Performed on: 9/15/2011

Service#	Start Date	Start Time	User ID	Patient	Description	Provider	Status
127234	9/15/2011	6:04 AM	R4500	Fortney, Robert	Check Blood Pressure	Barbee, Christy	In Process
126734	9/15/2011	6:04 AM	R4500	Fortney, Robert	Immunization - Influenza	Barbee, Christy	Declined
127233	9/15/2011	9:15 AM	J0915	Demo, Joseph	Chemistry Panels	Barbee, Christy	Completed
126733	9/15/2011	6:45 AM	R4500	Fortney, Robert	X-Ray Procedure - Chest	Beryllium, Tommy	Completed
124729	9/15/2011	9:30 AM	J0915	Demo, Joseph	Urinalysis	Lyell, Stacey	Completed
124730	9/15/2011	9:30 AM	J0915	Demo, Joseph	Check Blood Pressure	Lyell, Stacey	Completed
124731	9/15/2011	9:30 AM	J0915	Demo, Joseph	Check Vitals	Lyell, Stacey	Completed
125211	9/15/2011	10:00 AM	J0915	Demo, Joseph	Urine Drug Screen (DOT)	North, Melissa	In Process
124728	9/15/2011	9:30 AM	J0915	Demo, Joseph	CBC	Shelton, Patsy	Completed
125212	9/15/2011	9:45 AM	J0915	Demo, Joseph	X-Ray Procedure - Chest	Shissler, Linda	In Process
103175	10/20/2010	9:48 AM	R4500	Fortney, Robert	HRP Psychological Report	Thermal, Josh	In Process

To view another date of service, simply pick a date from the calendar tool located on the left of the *Daily Services Form*. The count of daily service records is displayed at the bottom right corner of the form.

Service Date Calendar

<< September 2011 >>

S	M	T	W	T	F	S
					1	2
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Number of Records Found: 11

Service Search View

The Service Search View function is similar to the Case Search View function. It lists medical events by services instead of cases. Users can access each of the cases directly by highlighting a

case on the list and clicking on the View or Open icon on the menu bar. A corresponding service form is opened depending on the procedure linked to the service.

User ID: EMBOSAPPDV\1A2B3 - Database: srssd.world - Active Schema: OPR\$EMBOS -- Webpage Dialog

Electronic Medical Business Operations System (EMBOS®)

Service Search Form For Test Purposes Only

Search Criteria

Service #:

Date Range: 9/14/2011 to 9/16/2011

Procedure: < all procedures >

Organization: < all organizations >

Patient: (User ID or SSN) Search

Provider: < all providers >

Status #: < all statuses >

Search Report Reset Close

Search Results for the criteria specified above

Service#	Start Date	Start Time	User ID	Patient	Description	Provider	Status
103175	10/20/2010	9:48 AM	R4500	Fortney, Robert	HRP Psychological Report	Thermal, Josh	In Process
126733	9/15/2011	6:45 AM	R4500	Fortney, Robert	X-Ray Procedure - Chest	Beryllium, Tommy	Completed
126734	9/15/2011	6:04 AM	R4500	Fortney, Robert	Immunization - Influenza	Barbee, Christy	Declined
127234	9/15/2011	6:04 AM	R4500	Fortney, Robert	Check Blood Pressure		In Process
124728	9/15/2011	9:30 AM	J0915	Demo, Joseph	CBC	Shelton, Patsy	Completed
124729	9/15/2011	9:30 AM	J0915	Demo, Joseph	Urinalysis	Lyell, Stacey	Completed
124730	9/15/2011	9:30 AM	J0915	Demo, Joseph	Check Blood Pressure	Lyell, Stacey	Completed
124731	9/15/2011	9:30 AM	J0915	Demo, Joseph	Check Vitals	Lyell, Stacey	Completed
125211	9/15/2011	10:00 AM	J0915	Demo, Joseph	Urine Drug Screen (DOT)	North, Melissa	In Process
125212	9/15/2011	9:45 AM	J0915	Demo, Joseph	X-Ray Procedure - Chest	Shissler, Linda	In Process
127233	9/15/2011	9:15 AM	J0915	Demo, Joseph	Chemistry Panels	Barbee, Christy	Completed

Number of Records Found: 11

For Test Purposes Only

Below is an example of the use of the service search function to find out how many *Completed Clinical Evaluation* services were performed by *Tommy Beryllium* in 2010.

Search Criteria

Service #:

Date Range: 1/1/2010 to 12/31/2010

Procedure: Clinical Evaluation

Organization: < all organizations >

Patient: (User ID or SSN)

Provider: Beryllium, Tommy

Status #: Completed

EMBOS Beryllium Tracking Workstation

The EMBOS Beryllium Tracking Workstation module provides users with tools to help streamline the Beryllium Tracking workflow. The workflow queue lists *Beryllium Tracking* services of all statuses. The *Beryllium Tracking Workstation* form combines services and procedures related to *Be* assessment including *Restrictions*, *Diagnoses*, and *LPT* tests history. Users can track the services throughout the life cycle of the cases. Any services encountered after patients are tracked will automatically be linked to *Beryllium Tracking* records.

Beryllium Tracking Workstation

The *Beryllium Tracking Workstation* form appears when users select the *Tracking Workstation* option from the *Beryllium* menu of the EMBOS *Home Page*. The form contains two main sections. A list of active patients and certain former patients in the *Beryllium Worker* program is displayed on the top part of the form. The second portion of the form consists of lists of related medical services, restrictions, diagnoses, and LPT tests, separated in tabs format. Related tracking records appear when users highlight a patient record on the *Be* tracking list above.

The image shows the EMBOS Beryllium Tracking Workstation form. At the top, there is a header bar with the text 'Electronic Medical Business Operations System (EMBOS®)' and 'Beryllium Tracking Workstation'. Below this, there are tabs for 'Labels' and 'Reports'. A status filter is set to 'All Incomplete Records'. A list of patients is displayed with columns for Service#, Badge#, Patient, Program, Work Phone, Start Date, and Status. A callout box points to the 'Status' column, listing 'All Incomplete Records', 'Declined', 'Completed', 'In Process', and 'SOMD Review'. Below the patient list, there is a section for 'Tracking Record Details for: Demo, Edna L (D1001)'. This section has tabs for 'Related Services', 'Restrictions', 'Temporary Diagnoses', 'Permanent Diagnoses', and 'LPT History'. The 'Related Services' tab is active, showing a table with columns for Service#, Start Date, Start Time, Description, Provider, and Status.

Service#	Badge#	Patient	Program	Work Phone	Start Date	Status
111794		Asbestos, Richard (R3200)	Be Worker		1/18/2011	In Process
90963		Beryllium, Tommy (T4200)	Be Assoc Worker		7/26/2010	In Process
50867		Bowl, Missy Q (M5678)	Be Worker		12/29/2008	SOMD Review
59091		Bridges, Betsy E (B3300)	Be Worker		6/29/2009	SOMD Review
52421		Brown, Wally F (W5975)	Be Assoc Worker		1/12/2009	In Process
82791		Davis, Melissa T (QOT)	Be Worker		6/2/2010	In Process
128736		Demo, Edna L (D1001)	Be Worker		9/15/2011	In Process
50353		Dotson, Diana R (D8700)	Be Worker		11/17/2008	In Process
79279		Duck, Molly M (M0103)	Be Worker		5/10/2010	SOMD Review
62599		Dylan, Allison J (A7600)	Be Assoc Worker	(865)574-9874	8/13/2009	In Process
103180		Fortney, Robert (R4500)	Be Assoc Worker		10/20/2010	In Process

Service#	Start Date	Start Time	Description	Provider	Status
127242	9/15/2011	03:05 PM	Beryllium LPT	Bridges, Betsy E	Completed
127238	9/15/2011	03:05 PM	Beryllium Assessment	Beryllium, Tommy	Completed

Creating Beryllium Tracking Records

Users can create a *Be* tracking record manually from any EMBOS Workstation. The *Beryllium Tracking* records are also created by the EMBOS system automatically based on the business rules covered in the later part of the chapter.

To create a *Be* tracking record on a patient manually, go to any EMBOS Workstation. Register a patient and add the service from the *Services Performed* toolbar. The *Activity Select Form* dialog appears. Select the *Beryllium Tracking Record* from the *Medical Procedures List* under the *Other Procedures* folder and click on the *OK* button.

The Beryllium Tracking Form appears. Users can choose to add related medical services and health assessments to the tracking record.

Electronic Medical Business Operations System (EMBOS®)
Beryllium Tracking Form For Test Purposes Only

Name: Patient Quick Links ▼ Patient ID:
(First) (Middle) (Last)

Birth Date: Age: Gender: Race: SSN:

Organization: Home Phone: User ID:
 Comp Job Title: Work Phone:

Procedure: Comments: Service #:

Facility: Start Date: Provider:
 Curr Service Date: Start Time: Status:

Supporting Services:

Service #	Start Date	Start Time	Description	Provider	Status
127238	9/15/2011	3:05 PM	Beryllium Assessment	Tommy Beryllium	Completed
127242	9/15/2011	3:05 PM	Beryllium LPT	Betsy E Bridges	Completed

To add related medical services, click on the green plus sign button on the *Supporting Services* toolbar. The *Event Relationship Manager Form* dialog appears. Select one or more of the available services listed on the left-hand-side of the form, *Patient Services* list, and click on the green greater than sign button to move the service(s) into the list of *Services to Associate*, the right-hand-side list. To remove services from the associated list, highlight the services and

click on the green less than sign button. After the proper services are listed under the *Services to Associate* list, click on the *OK* button. The related services are not linked to the *Beryllium Tracking* record until the main form is saved.

Electronic Medical Business Operations System (EMBOS®)
Event Relationship Manager Form For Test

Patient Services	Services to Associate
128248 - Fitness For Duty: 10/6/2011 11:30:00 AM	127238 - Beryllium Assessment: 9/15/2011 3:05:46 PM
128245 - Medications Evaluation: 10/10/2011 2:45:00 PM	127242 - Beryllium LPT: 9/15/2011 3:05:46 PM
128243 - X-Ray Procedure - Wrist: 9/19/2011 11:45:00 AM	
128241 - X-Ray Procedure - Chest: 9/19/2011 11:45:00 AM	
128240 - MMPI-2 RF: 9/19/2011 11:15:00 AM	
128239 - Mental Status Review: 9/19/2011 10:30:00 AM	
128238 - HRP Psychological Report: 9/19/2011 10:45:00 AM	
128237 - Structured Interview Survey: 9/19/2011 10:30:00 AM	
128236 - Tuberculosis Skin Test: 9/19/2011 9:15:00 AM	
127736 - Beryllium LPT: 10/6/2011 11:30:00 AM

The newly added services are displayed on the *Related Services* tab of the *Beryllium Tracking Workstation*. To view the details of these services, first users have to click on the open button of the tracking records list toolbar. Then use the view button on the *Beryllium Tracking Form* to view the service detail.

Tracking Record Details for: Demo, Edna L (D1001)

Related Services Restrictions Temporary Diagnoses Permanent Diagnoses LPT History

Service#	Start Date	Start Time	Description	Provider	Status
127242	9/15/2011	03:05 PM	Beryllium LPT	Bridges, Betsy E	Completed
127238	9/15/2011	03:05 PM	Beryllium Assessment	Beryllium, Tommy	Completed

Any patients' temporary or permanent restrictions records are displayed on the Restrictions tab. Users use the *Fitness for Duty* form to maintain patients' restrictions.

Tracking Record Details for: Demo, Edna L (D1001)

Related Services Restrictions Temporary Diagnoses Permanent Diagnoses LPT History

ID	Last Evaluation	Restriction	Type	Start Date	Stop Date
1113	10/6/2011	Minimize Repetitive Motion Of: Left Wrist	Permanent	10/6/2011	
1091	10/6/2011	Limit respirator use to face mask	Temporary	9/19/2011	
1090	9/19/2011	Avoid Pulmonary Irritants	Temporary	9/19/2011	9/30/2011

Automation Rules

The *Beryllium Tracking* module automates the creation of the Tracking Record as well as linking certain services to it upon their creation. Below are the rules that drive this functionality.

Be Tracking Record Creation

If the patient is in the Active Beryllium Worker Program

- The Patient is being registered (Visit or Non-Visit) for an 018 (Complete Periodic Health Exam)
- There is no open Be Tracking Record currently associated with the patient
- Generate a Be Tracking Record and associate it with the current Registration

If the patient is in the Former Beryllium Program

- It has been 30 months (~3 years) since their last Be Tracking Record
- There is no open Be Tracking Record currently associated with the patient
- Generate a Be Tracking Record and associate it with the current Registration

Auto Linking Services

- The service being created is one of the following types
 - Be LPT
 - Spirometry
 - Chest X-Ray
 - Physical Exam
 - Be Assessment
- There is an open Be Tracking Record associated with the patient
- The service is being added after the start date of the Be Tracking Record
- Link the newly created service to the open Be Tracking Record

Beryllium Tracking Report

To print a tracking record report, highlight one of the patient records from the list and choose the *Beryllium Tracking Record Report* option from the *Reports* menu. A patient's Beryllium Tracking Record Report can be printed to a printer or saved to a PDF file.

Electronic Medical Business Operations System (EMBOS)

SRNS Medical Department

Beryllium Tracking Record Report

Printed On: 10/18/2011 7:23:07 pm

Page 1 of 3

Patient: Demo, Edna L

Organization:

Badge #:

Org Code:

Gender: FEMALE

Birth Date: 7/4/1955

Start Date of Beryllium Tracking Record: 9/15/2011

Date of last completed Complete Periodic Health Exam:

Chest X-Ray Summary

Service #	Service Date/Time	Status	Requestor	Provider/Facility
Report Date	Radiologist	Interpretation		
Code	Summary			

LPT Summary

Service #	Service Date/Time	Status	Analysis Date	Provider/Facility
127738	10/6/2011 11:30AM	In Process	10/6/2011	Beryllium, Tommy SRS Occupational Health Services

Lab Facility: SRS Occupational Health Services

Description	Results	Comments
LPT Result 1	Repeat Abnormal	Increased compare to previous test

Service #	Service Date/Time	Status	Analysis Date	Provider/Facility
127242	9/15/2011 3:05PM	Completed	9/18/2011	Bridges, Betsy E SRS Occupational Health Services

Lab Facility: SRS Occupational Health Services

Description	Results	Comments
LPT Result 1	Border Line	Repeat in 14 days

Spirometry Summary

Service #	Service Date/Time	Status	Analysis Date	Provider/Facility
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EMBOS Patient Records

The EMBOS Patient Records module provides functions to create and maintain employee/patient records. In the Patient Records module on the EMBOS home page, there are six options available for use: New Patient, Open Patient, Delete Patient, Open Patient EMR, Open Patient Lab History, and Search Badge History.

New Patient

A Patient Detail Form dialog appears after choosing the *New Patient* submenu. Like most EMBOS forms, the *Patient Detail Form* displays Personally Identifiable Information (PII) at the top of the form. Information required includes first name, last name, date of birth, gender, and user ID. The SRS's format for the User ID field is a single letter followed by a 4-digit number (e.g. "A1234"). The Patient's Age field is a read-only field. It displays a system-calculated age from the current date and patient's birth date.

This screenshot shows the header section of the Patient Detail Form. It includes the following fields and values: Name (First: Joseph, Middle: W, Last: Demo), Birth Date: 12/24/1961, Age: (empty), Gender: Male, Race: Asian America, SSN: 201-10-9131, Organization: Unknown, Home Phone: () - () - (), Work Phone: () - () - (), and User ID: J0913. The 'Patient ID' field is set to '< new >'. There are 'Patient Quick Links' and 'Patient ID' dropdown menus.

When creating a new patient record, the Patient ID field is grayed out for a system-assigned number. This is to guarantee uniqueness of a patient record. Other fields on the Patient Detail Form header, such as *Organization* and *Job Title*, will be populated by the interface to the facility ERP (Enterprise Resource Planning) system.

Patient's detail information is located at the bottom half of the *Patient Detail Form*. General users are only allowed to enter information into the patient's address fields. The rest of the information is populated by a system administrator and/or ERP interfaces.

Patient Detail

Address: 1225 Summer Oak Lane

City: Aiken **State:** SOUTH CAROLINA **Zip:** 29804

Employer: **Active:** ☒

Shift: Unknown

Hire Date: **Wage Class:** Unknown

Service Date: **Category:** Unknown

Exit Date: **COCS:** Unknown

Supervisor: (SSN) (Full Name) (Work Phone)

To save patient information into the database, click the *Save & Exit* button at the bottom of the form. The *Save* button saves the information and leaves the form open for other EMBOS functions.

Open Patient

The *Open Patient* function fetches a patient record from the database to prepare a record for view access or entering new/updated information. The *Person Select Form* dialog appears after choosing the *Open Patient* submenu from the Patient Records module.

Untitled Page -- Webpage Dialog

Electronic Medical Business Operations System (EMBOS®)
For Test Purposes Only

Person Select Form

Enter User ID or SSN:

OK Cancel Search...

For Test Purposes Only

There are two options to locate patient record(s): direct search using User ID or SSN, and wildcard search using partial patient information.

Direct Search

From the Person Select Form, enter the patient's *User ID* or *SSN* and click *OK*. EMBOS seeks patient records in the database for an exact match of the number entered.

Enter User ID or SSN:

If using SSN to search for a patient, enter the Social Security Number without dashes. If the record exists, EMBOS displays patient information in a new window dialog, Patient Detail Form.

Wildcard Search

A Patient Search Form appears after clicking on the *Search...* button on the Person Select Form. The Patient Search Form allows users to enter partial information of patients as criteria to locate one or more patients.

Enter User ID or SSN:

Electronic Medical Business Operations System (EMBOS®)
Patient Search Form

Last Name:	<input type="text"/>	First Name:	<input type="text"/>
Organization:	<input type="text" value="All Organizations"/>		
Comp Job Title:	<input type="text"/>		
Gender:	<input type="text" value="All Genders"/>		
Birth Date:	From: <input type="text"/>	To: <input type="text"/>	Date Format: (mm/dd/yyyy)

Enter criteria above and then press the 'SEARCH' button to display results below.
To reset the search criteria and clear the results pane, press the RESET button.

An example of a wildcard search is using the patient's last name that contains the characters "de". By using the wildcard character, "percent" sign (%), in front of and behind the characters "de", EMBOS searches the database for patients who have a last name containing "de". The list of patients is displayed in the Search Results table at the bottom half of the form.

Enter criteria above and then press the 'SEARCH' button to display results below.
To reset the search criteria and clear the results pane, press the RESET button.

Search Results: 6 RECORDS FOUND

Rec #	Name	User ID	SSN	Patient ID	Birth Date	Organization
1	Demo, Joseph W	J0915	201-10-9151	11641	07/04/1961	
2	Demo, Mary Two	Y1102	201-10-9092	11144	07/04/1976	
3	Demo, ToDelete S	D0917	201-10-9171	11642	07/04/1976	
4	Demo, Will One	Y2011	201-10-9091	11141	07/04/1976	
5	Ryder, Matt Q	M4185	741-85-2963	2610	11/01/1974	UTILITIES SHIFT N4
6	Underwood, Nancy U	N6500	865-00-6565	38	11/01/1974	DEFENSE PROGRAMS

A user can access a patient record by highlighting one of the rows and clicking the *OK* button at the bottom of the form. The Patient Search Form will close and the Person Select Form is populated with the selected patient's User ID.

Enter User ID or SSN: J0915

OK Cancel Search...

Click the *OK* button to bring up the selected patient into the Patient Detail Form. Opening the Patient Detail Form allows users to have quick access to patient demographic and medical information from the *Patient Quick Links* dropdown menu.

Name: Joseph (First) W (Middle) Demo (Last) Patient Quick Links Patient ID: 11641

Patient Quick Links provides access to patient allergies, medications, notes, EMR (Electronic Medical Record), demographics, address and detail labels, lab history, and WebWHOS.

Users can access each of the medical information sections by highlighting each tab. Depending on the security role assigned to each user, some of the information is read-only and others can be added and/or modified. The next three examples demonstrate three different EMBOS menu icons and functions that allow users to view, add, modify, or delete medical records.

Read Only Medical Information

The Patient Immunizations tab is one of the medical information tabs with read-only property. Users are not allowed to add or modify information in this section with the *Open Patient EMR* function. To add or modify immunization records, users need to access the information via the *Workstations* function with a Service or Case record. To view an immunization record, simply highlight a record on the table grid and click the blue eye button, *View Selected Service*. Other read-only tabs include Cases, Services, Restrictions, Registrations, Diagnosis, Clinical Notes, and Be Tracking Records.

Immunizations Performed for: Will One Demo

Service#	Start Date	Start Time	Description	Provider	Status
123928	9/10/2011	10:29 AM	Immunization - MMR	Watson, Matt L	In Process
123927	9/10/2011	10:22 AM	Immunization - Influenza	Watson, Matt L	In Process

View Selected Service

Non-Modifiable Medical Information

The Patient Allergies tab is the only tab in the *Open Patient EMR* function where users can either add or delete allergy records. To add an allergy record, click on the “Blank Page” menu icon on the tab bar. The *Patient Allergy Form* will open, where you can enter a new allergy. Then click the *Save & Exit* button at the bottom of the form. To delete an allergy record, highlight one of the allergy record rows, and click on the “Black X” menu icon on the tab bar. The *Patient Allergy Form* will open, where you can verify the information is valid. Then click the *Delete* button at the bottom of the form.

Patient Allergies

ID	Category	Description	Allergy
400	Medications		PCN - Penicillin
401	Food		Peanut

Delete Selected Allergy

New Allergy

Modifiable Medical Information

Medical information tabs with the “Yellow Folder” menu icon on the tab bar allow users to open and edit existing records. The tab selections are Enrollments, Medications, and Psychological Notes. To modify an existing record, highlight a row listed in the table grid, and then click on the icon. In the example of the *Patient Medications* below, the *Reported Medication Form* appears; modify and validate the information on the form, and then click on the *Save & Exit* button at the bottom of the form. The tab is refreshed with the newly edited information.

The screenshot shows the 'Patient Medications' tab selected in the top bar. Below the tab bar is a table with columns: ID, Description, Dosage, Frequency, Start Date, and Stop Date. The table contains three rows of medication data. A red box highlights the 'Yellow Folder' icon in the tab bar, and a blue arrow points from it to a callout box labeled 'Edit/Open Selected Medication'.

ID	Description	Dosage	Frequency	Start Date	Stop Date
35799	Lasix	20 mg	Twice a Day	1/1/2009	
35800	Lipitor	10 mg	Once a Day	5/1/2008	
35801	Aspirin	80 mg	Once a Day	1/1/1990	

Patient Lab History

To open a patient lab history, use one of the patient search methods mentioned above to locate a patient record. The *Patient Lab History Form* lists lab tests previously performed on the patient. Most of the records in this form are read-only except ones in the Beryllium LPT tab. To view a lab result, click on one of the lab test tabs, highlight one of the rows in the table grid, and click on the “Blue Eye” menu icon on the tab bar. The *Lab Test Service Form* is opened for lab results view.

The screenshot shows the 'CBC/Diff History for: Joseph W Demo' tab selected in the top bar. Below the tab bar is a table with columns: Service#, Start Date, Start Time, Description, Provider, and Status. The table contains one row of lab test data. A red box highlights the 'Blue Eye' icon in the tab bar, and a blue arrow points from it to a callout box labeled 'View Selected Service'.

Service#	Start Date	Start Time	Description	Provider	Status
124728	9/15/2011	09:30 AM	CBC	Shelton, Patsy M	Completed

Patient Quick Links

Patient Quick Links is a functions drop-down menu located on the top right section of the header of all EMBOS forms (patient information header). The *Patient Quick Links* menu allows EMBOS users to get direct access to patients' pertinent medical information including allergies and medications.

The screenshot shows the patient information header with the following fields:

- Name:** Joseph (First), W (Middle), Demo (Last)
- Birth Date:** 7/4/1961
- Age:** 50
- Gender:** Male
- Race:** Asian America
- SSN:** 201-10-9151
- Organization:** Unknown
- Home Phone:** () - -
- User ID:** J0915
- Comp Job Title:**
- Work Phone:** () - -

The **Patient Quick Links** dropdown menu is highlighted with a red box.

When users click on the *Patient Quick Links* text, a drop-down menu appears. The menu contains links to *Patient Allergies*, *Medications*, *Notes*, *EMR*, and *Demographics* forms. Users can also use the menu to print various labels for patients' charts and paper medical forms.

Patient Notes

The *Patient Notes Form* displays collections of all patients' past and present *Clinical* and *Psychological Notes* in a simple SOAP note format. It allows providers to review all notes in the same screen. Notes from various visits or cases are aligned in a table format so providers can easily compare and follow patients' progress. Sorting order of each data column can also be changed by simply click on the header row.

Clinical Notes Psych Notes

Clinical Notes for: Edna L Demo

Sortable Columns

Service#	Start Date	Assess. Type	Author	Note
127238	9/15/2011	Be Assessment	Beryllium, Tommy	S: Patient was registered as a walk-in with the following complains; - Persistent Coughing - SOB ... O: V/S recorded. Slight fever. A: Patient is a 56 y.o. white female with probable Be exposure. P: Orders: - BeLPT - Follow-Up Visit in 2 weeks
127246	9/15/2011	Physical Exam	Cosby, Otis	S: Patient complains of headache and sore throat. NKDA, allergic to latex. O: See V/S A: - Swollen and tender Cervical Lymph Nodes - Enlarge Tonsillar P: - Throat culture - Amoxicillin 500 mg, po, bid, #10

Patient EMR Tabs

One great benefit of the *Patient EMR Form* is that users can view patients' entire medical records in one spot from allergies, to clinical notes, to work restrictions.

Cases Services Enrollments **Restrictions** Appointments Registrations Medications Dispensed Medications

Immunizations Allergies Temporary Diagnosis Permanent Diagnosis Clinical Notes Psych Notes Be Tracking Records

Patient Restrictions

ID	Last Evaluation	Restriction	Type	Start Date	Stop Date
1090	9/19/2011	Avoid Pulmonary Irritants	Temporary	9/19/2011	9/30/2011
1091	9/19/2011	Limit respirator use to face mask	Temporary	9/19/2011	

Cases Services Enrollments **Allergies** Restrictions Appointments Registrations Medications Dispensed Medications

Immunizations Temporary Diagnosis Permanent Diagnosis Clinical Notes Psych Notes Be Tracking Records

Patient Allergies

ID	Category Description	Allergy
400	Medications	PCN - Penicillin
401	Food	Peanut

Cases Services Enrollments Restrictions Appointments Registrations **Medications** Dispensed Medications

Immunizations Allergies Temporary Diagnosis Permanent Diagnosis Clinical Notes Psych Notes Be Tracking Records

Patient Medications

ID	Description	Dosage	Frequency	Start Date	Stop Date
37804	Metoprolol	25 mg	Twice a Day	1/1/2010	
37805	Aspirin	81 mg	Once a Day	5/1/2005	

Users can also work on patients' appointments from the *Patient EMR Form*. For example, to reschedule an appointment, select the *Appointments* tab, pick an appointment from the list and click on the green arrow icon. The *Reschedule Appointment Form* appears. Change the date/time and save the form accordingly.

Appointment History for: Edna L Demo

Sched Date	Sched Time	Status	Reason	Case Description(s)
11/7/2011	9:30 AM	Scheduled		Case # 127735 : Psych Eval, RTW, Non-Occupational Event
10/26/2011	11:30 AM	Scheduled		

Printing Patient Label

From the *Patient Quick Links* menu, select one of the label formats. The *Print Patient Detail Label Form* appears. Select the destination printer, number of labels, choose whether to print the patient's SSN on the labels, and click the *Print* button.

Electronic Medical Business Operations System (EMBOS®)
Print Patient Detail Label Form For Test Purposes Only

Select Printer:

Label Text: Demo, Edna L
 Badge: SSN: 201110011
 Sex: FEMALE
 Birth Date: 7/4/1955

Number of Labels: 4

Include SSN: ☒

Patient Lab History versus Patient EMR

Depending on what information users are seeking from the application, one EMBOS form may be a better fit than the others. An example is viewing of multiple Beryllium LPT results. Even though users can find all lab services in the *Patient EMR Form*, getting to the actual results requires more steps than viewing lab results from the *Patient Lab History Form*. In this case, users will have to find the *Beryllium LPT* services from the *Services* tab of the *Patient EMR* form. Then highlight one and click on the view button to see the result. Only one result can be viewed at one time. In the *Patient Lab History* form, all *Beryllium LPT* results are visible and listed in table format so that comparisons can be done.

Services Tab of *Patient EMR* Form

Cases **Services** Enrollments Restrictions Appointments Registrations Medications Dispensed Medications
Immunizations Allergies Temporary Diagnosis Permanent Diagnosis Clinical Notes Psych Notes Be Tracking Records

Services Performed for: Edna L Demo

Service#	Start Date	Start Time	Description	Provider	Status
127238	9/15/2011	03:05 PM	Beryllium Assessment	Beryllium, Tommy	Completed
127736	10/6/2011	11:30 AM	Beryllium LPT	Beryllium, Tommy	In Process
127242	9/15/2011	03:05 PM	Beryllium LPT	Bridges, Betsy E	Completed
127241	9/15/2011	03:05 PM	Check Vitals	Shelton, Patsy M	Completed

Users need to open the service form to view the results separately

Beryllium LPT Tab of *Patient Lab History* Form

Arsenic (Urine) Audiogram **Beryllium LPT** Blood Lead & Zinc Chem Panels CBC/Diff ECG HIV Hemocult
Hepatitis B Mercury (Blood) Mercury (Urine) PSA Spirometry Thallium (Urine) UA/Micro Vision X-Ray

Beryllium LPT History for: Edna L Demo

Service#	Start Date	Start Time	Description	Provider	Comments	Status
127736	10/6/2011	11:30 AM	Beryllium LPT	Beryllium, Tommy		In Process
			Analyte	Result	Comment	
			LPT Result 1	Repeat Abnormal	Increased compare to previous test	
127242	9/15/2011	3:05 PM	Beryllium LPT	Bridges, Betsy E		Completed
			Analyte	Result	Comment	
			LPT Result 1	Border Line	Repeat in 14 days	

All Beryllium LPT results are visible and listed in a table format.

EMBOS Medications and Allergies

Medications and allergies are accessed from the *Medications and Allergies* tab on the EMBOS home page.

Medications

The medications module allows the user to create new medications, edit medications, delete medications, and view medications, for both reported medications and dispensed medications. Reported Medications are those the patient is taking that have been prescribed by a physician outside of SRS. Dispensed medications are those that have been dispensed by a provider within SRS.

A reported medication is associated with a patient and has a *nonformulary drug* (prescribed by a physician outside of SRS), dosage, frequency, start date, and stop date. It may also contain a modifier which can be entered by the user if a drug is not in the list provided. A dosage consists of a dosage quantity and a dosage unit of measurement.

A dispensed medication is associated with a patient and has a *formulary drug* (dispensed by a provider inside SRS), dosage, frequency, start date, stop date, the provider who ordered the medication, the provider who dispensed the medication, the dispensed amount, dispensed date, and dispensed time. The dispensed amount consists of a dispensed quantity and a dispensed unit of measure.

A drug consists of a description and generic description. A drug must be one of two types – formulary or nonformulary. A reported medication contains a nonformulary drug and a dispensed medication contains a formulary drug. If selecting a nonformulary drug and a drug does not exist that matches the patient's medication, a drug with a description of *Other* can be selected.

To maintain data integrity, the EMBOS application enforces the following rules for reported medications:

- A dosage quantity must have a dosage unit of measure.
- A dosage unit of measure must have a dosage quantity.
- A medication must have a start date.
- The medication start date must be on or before the medication stop date.

- A medication may or may not have a stop date.
- Once a stop date has been entered, the medication cannot be edited.
- If *Other* is selected as the medication description, a medication name is required.

To maintain data integrity, the EMBOS application enforces the following rules for dispensed medications:

- A dosage quantity must have a dosage unit of measure.
- A dosage unit of measure must have a dosage quantity.
- A dosage quantity must be numeric.
- A medication must have a start date.
- The medication start date must be on or before the medication stop date.
- A medication may or may not have a stop date.
- Once a stop date has been entered, the medication cannot be edited.
- A medication must have an *Ordered by Provider*.
- A dispensed quantity must have a dispensed unit of measure.
- A dispensed unit of measure must have a dispensed quantity.
- A dispensed quantity must be numeric.
- The dispensed date must be on or before the start date.
- A patient using POMS can only enter the stop date of a dispensed medication.

For both reported medications and dispensed medications, there is a toolbar above the medications list on the Patient Medications Form. This toolbar contains icons that let you create, edit, delete, and view medications.

To open the Medications module, click *Open Medications* from the *Medications and Allergies* tab.

You will be prompted to use the *Person Select Form* (see *Patient Search* section in the *EMBOS Basics* chapter) to locate the patient with whom you are associating the medication.

Untitled Page -- Webpage Dialog

Electronic Medical Business Operations System (EMBOS®)

Person Select Form For Test Purposes Only

Enter User ID or SSN:

OK Cancel Search...

For Test Purposes Only

After you select the patient, the *Patient Medications Form* will open and you will see a tab for *Reported Medications* and a tab for *Dispensed Medications*. The medications listed under Reported Medications are those the patient is taking that have been prescribed by a physician outside of SRS.

ID	Description	Dosage	Frequency	Start Date	Stop Date
30777	Carbamazepine (Tegretol)	2 mL	Before Meals	7/6/2010	
30776	Sulfamethoxazole/Trimethoprim	1 cap	Twice a Day	5/1/2010	
30778	Macrochantin	4 mg	Twice a Day	12/6/2009	

The medications listed under Dispensed Medications are those that have been dispensed by a provider within SRS.

ID	Description	Dosage	Frequency	Ordered By	Dispensed By	Start Date	Stop Date
37302	Diphenhydramine 25 mg tab Benadryl	4 cap	4 Times a Day	Hatmaker, Charlene		9/29/2011	
37301	Aspirin 325 mg tab ASA	8 cap	Every 4 Hours	Thomas, Sula	Shissler, Linda	9/30/2011	10/1/2011

Create a New Medication

Use the *Create New Medication* icon on the toolbar to add a new reported or dispensed medication to the list of medications.

The screenshot shows a window titled "Patient Medications" with two tabs: "Reported Medications" (selected) and "SRS Dispensed Medications". Below the tabs is a toolbar with icons for adding, deleting, and viewing medications. A table displays the following data:

ID	Description	Dosage	Frequency
37804	Metoprolol	25 mg	Twice a Day
37805	Aspirin	81 mg	Once a Day

An alphabetical list of medications will be displayed. Select the desired medication from the list and click *OK*. For a nonformulary drug for reported medications, you can select *Other* from the "O" list if a drug does not exist that matches the patient's medication.

The screenshot shows the "Electronic Medical Business Operations System (EMBOS®) Drug Select Form" with the subtitle "For Test Purposes Only". The window is titled "Drug List (Non-Formulary)". It displays a list of medications organized by letter. The "O" list is expanded, showing the following medications:

- Omega 3
- Omeprazole
- Omnicef
- One-A-Day Multiple Vitamin
- Osteo Bi-Flex
- Other
- Oxycodone
- Oxycontin

A *Reported Medication Form* or a *Dispensed Medication Form* will open, with the patient information at the top of the form. In the lower part of the Reported Medication Form, you specify the nonformulary drug, dosage, frequency, start date, and stop date. Then click the *Save* or *Save & Exit* button.

Electronic Medical Business Operations System (EMBOS®)
Reported Medication Form For Test Purposes Only

Name: <input type="text" value="Edna"/> <input type="text" value="L"/> <input type="text" value="Demo"/>			Patient Quick Links ▼ Patient ID: <input type="text" value="12142"/>	
(First) (Middle) (Last)				
Birth Date: <input type="text" value="7/4/1955"/>	Age: <input type="text" value="56"/>	Gender: <input type="text" value="Female"/>	Race: <input type="text" value="White"/>	SSN: <input type="text" value="201-11-0011"/>
Organization: <input type="text" value="Unknown"/>			Home Phone: <input type="text" value="() - -"/>	User ID: <input type="text" value="D1001"/>
Comp Job Title: <input type="text"/>			Work Phone: <input type="text" value="() - -"/>	

Medication ID:

Medication Description:

Dosage: <input type="text" value="16"/> <input type="text" value="capsule"/>	Start Date: <input type="text" value="10/4/2011"/>
Frequency: <input type="text" value="4 Times a Day"/>	Stop Date: <input type="text" value="10/8/2011"/>

In the lower part of the Dispensed Medication Form, you need to specify more information than on the Reported Medication Form. You need to specify the dosage, frequency, name of the provider who ordered the medication, name of the provider who dispensed the medication, the dispensed amount, and the start and stop date for the medication. Then click the *Save* or *Save & Exit* button.

Dispensed Medication ID:

Medication Description:

Dosage: <input type="text" value="4"/> <input type="text" value="capsule"/>	Dispensed Date: <input type="text" value="10/4/2011"/>
Frequency: <input type="text" value="4 Times a Day"/>	Dispensed Time: <input type="text" value="5:29 PM"/>
Ordered By: <input type="text" value="Beryllium, Tommy"/>	Start Date: <input type="text" value="10/4/2011"/>
Dispensed By: <input type="text" value="Trowbridge, Lillie T"/>	Stop Date: <input type="text" value="10/5/2011"/>
Dispensed Amount: <input type="text" value="4"/> <input type="text" value="capsule"/>	

The new medication will then be added to the patient's list of medications.

Edit a Medication

A medication can only be edited if no stop date has been previously designated. To edit/change a medication without a stop date, select the medication in the list of medications and then click the *Edit Selected Medication* icon on the toolbar.

The medication form opens -- the name/description of the medication cannot be changed, but you can change the dosage, frequency, provider name, and dispensed amount. When you are finished making your changes, click *Save* or *Save & Exit*.

		Dispensed Medication ID: 37803	
Medication Description: Amoxicillin trihydrate 500 mg caps Amoxil			
Dosage:	500	milligram	Dispensed Date: 9/16/2011
Frequency:	Twice a Day		Dispensed Time: 4:15 PM
Ordered By:	Cosby, Otis		Start Date: 9/16/2011
Dispensed By:	Underwood, Nancy U		Stop Date:
Dispensed Amount:	20	capsule	

Save	Save & Exit	Close
------	-------------	-------

If you want to change the name/description of the medication, you will need to delete it and then create a new medication.

Delete a Medication

To delete a medication from the list, select the medication and then click the *Delete* icon on the toolbar.

A medication form opens and at the bottom, you can click the *Delete* button.

Electronic Medical Business Operations System (EMBOS®)				For Test Purposes Only	
Reported Medication Form					
Name: <input type="text" value="Edna"/> (First)		<input type="text" value="L"/> (Middle)	<input type="text" value="Demo"/> (Last)	Patient Quick Links ▼ Patient ID: <input type="text" value="12142"/>	
Birth Date: <input type="text" value="7/4/1955"/>	Age: <input type="text" value="56"/>	Gender: <input type="text" value="Female"/>	Race: <input type="text" value="White"/>	SSN: <input type="text" value="201-11-0011"/>	
Organization: <input type="text" value="Unknown"/>		Home Phone: <input type="text" value="() - -"/>		User ID: <input type="text" value="D1001"/>	
Comp Job Title: <input type="text"/>		Work Phone: <input type="text" value="() - -"/>			
			Medication ID: <input type="text" value="37808"/>		
Medication Description: <input type="text" value="Omega 3"/>					
Dosage: <input type="text" value="16"/> <input type="text" value="capsule"/>		Start Date: <input type="text" value="10/4/2011"/>			
Frequency: <input type="text" value="4 Times a Day"/>		Stop Date: <input type="text" value="10/8/2011"/>			
<input type="button" value="Delete"/> <input type="button" value="Close"/>					

The medication is then removed from the list of medications.

View a Medication

To view the medication form for a specific medication, select the medication in the list and then click the *View Selected Medication* icon on the toolbar.

The medication report opens, and you can only view the information on the medication. When you are finished, click the *Close* button at the bottom of the form.

Allergies

The EMBOS allergy module lets you create and delete patient allergies. To open the Allergies module, click *Open Allergies* from the *Medications and Allergies* tab.

You will be prompted to use the *Person Select Form* (see *Patient Search* section in the *EMBOS Basics* chapter) to locate the patient with whom you are associating the allergy.

 A screenshot of the 'Person Select Form' dialog box. The title bar reads 'Untitled Page -- Webpage Dialog'. The main title is 'Electronic Medical Business Operations System (EMBOS®)'. Below the title, it says 'Person Select Form' and 'For Test Purposes Only'. The form contains a text input field labeled 'Enter User ID or SSN:'. At the bottom, there are three buttons: 'OK', 'Cancel', and 'Search...'. The bottom right corner also says 'For Test Purposes Only'.

The Patient Allergies Form will open and you will see the patient information in the upper part of the form. In the lower part of the form, you will see a toolbar with two icons – one for creating a *New Allergy* and another for *Delete Selected Allergy*.

 A screenshot of the 'Patient Allergies Form'. The title bar reads 'Electronic Medical Business Operations System (EMBOS®)'. Below the title, it says 'Patient Allergies Form' and 'For Test Purposes Only'. The form displays patient information: Name (Edna L Demo), Birth Date (7/4/1955), Age (56), Gender (Female), Race (White), SSN (201-11-0011), Organization (Unknown), Home Phone, Work Phone, and User ID (D1001). At the bottom, there is a toolbar with two icons: a document with a plus sign (New Allergy) and a document with an X (Delete Selected Allergy). The 'Patient Allergies' text is also highlighted with a red rectangular box.

Create a New Allergy

To create a new allergy to associate with the patient specified in the upper part of the form, click the *New Allergy* icon on the toolbar.

The *Patient Allergy Form* will open. An EMBOS allergy is associated with a patient and has a required allergy category and a required allergy description. In the Patient Allergy Form, first select an *Allergy Category* from the drop-down list. Options available are *Animals*, *Chemicals*, *Food*, *Insects*, *Medications*, *Metals*, *Other*, *Plants*, and *Pollens*.

Electronic Medical Business Operations System (EMBOS®)
Patient Allergy Form For Test Purposes Only

Name: Edna (First) L (Middle) Demo (Last) **Patient Quick Links ▼ Patient ID:** 12142

Birth Date: 7/4/1955 **Age:** 56 **Gender:** Female **Race:** White **SSN:** 201-11-0011

Organization: Unknown **Home Phone:** () - - **User ID:** D1001

Comp Job Title: **Work Phone:** () - -

Allergy Category: < select allergy category > **Allergy ID:** < new >

Allergy: < select allergy category >

- Animals
- Chemicals
- Food
- Insects
- Medications
- Metals
- Other
- Plants
- Pollens

Buttons: Save & Exit, Close

For Test Purposes Only

Enter an allergy description in the *Allergy* field, and save this information by clicking either *Save* or *Save & Exit*.

Allergy Category: Animals **Allergy ID:** < new >

Allergy: cats

Buttons: Save, Save & Exit, Close

The new allergy will then be added to the *Patient Allergies* list.

Patient Allergies

ID	Category Description	Allergy
462	Animals	cats

Delete a Selected Allergy

To delete an allergy from a patient's record, select an allergy in the Patient Allergies list in the lower portion of the Patient Allergies Form, and then click the *Delete Selected Allergy* icon on the toolbar.

ID	Category Description	Allergy
462	Animals	cats

A new window opens where you click the *Delete* button.

The allergy is then removed from the Patient Allergies list.

Electronic Medical Business Operations System (EMBOS®)
Patient Allergies Form For Test Purposes Only

Name: Patient Quick Links ▼ Patient ID:
(First) (Middle) (Last)

Birth Date: Age: Gender: Race: SSN:

Organization: Home Phone: User ID:
 Comp Job Title: Work Phone:

Patient Allergies

ID	Category Description	Allergy
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EMBOS Questionnaire

The EMBOS Questionnaire module implements functionality associated with generating new, editing, and viewing patient questionnaires. The module also implements viewing documents associated with questionnaires, viewing a report of questionnaire statuses for new program enrollments, and capturing provider signatures.

The *Patient Questionnaires Form* allows users to generate new questionnaires, edit questionnaires, view questionnaires, and view positive answers to questionnaires. In addition, the Questionnaire module allows users to view a specific document associated with any questionnaire. For each of these actions, there is a respective icon above the *Patient Questionnaires* and *Patient Documents* list on the *Patient Questionnaires Form*.

Open Questionnaires

The *Patient Select Form* dialog appears after choosing the *Open Questionnaires* option from the *Questionnaire* menu of the EMBOS Home Page. Locate a patient record using one of the search methods provided in the *Patient Records* section. Like most of the EMBOS forms, the *Patient Questionnaires Form* displays Person Identifiable Information (PII) at the top of the form. The form contains two information tabs, *Patient Questionnaires* and *Patient Documents*.

Electronic Medical Business Operations System (EMBOS®)
Patient Questionnaires Form For Test Purposes Only

Name: Stan (First) M (Middle) Roberts (Last) Patient Quick Links ▼ Patient ID: 28

Birth Date: 11/1/1974 Age: 36 Gender: Male Race: SSN: 961-00-6161

Organization: Home Phone: User ID: S6100

Comp Job Title: Work Phone:

Patient Questionnaires Patient Documents

Patient Questionnaires

ID	Create Date and Time	Status	Complete Date and Time	Provider
528	7/10/2008 9:33:52 AM	Incomplete		
233	8/10/2006 3:21:58 PM	Provider Complete	8/10/2006 3:28:44 PM	Whitaker, Robert

To open an existing questionnaire, highlight one of the questionnaires listed on the first tab and click on the yellow folder button on the toolbar.

Patient Questionnaire Form

User Tips:

- Save** Saves the entire questionnaire; user continues completion of questionnaire.
- Save and Close** Save and close the entire questionnaire; follow instruction on exit page. User can return later to complete the questionnaire.
- Close** Close the questionnaire without saving any changes; follow instruction on exit page.
- Selecting N/A for a particular question constitutes answering no for that question as well as all of its sub-questions.
 - Save the questionnaire every 15 minutes to ensure your answers are saved. You do not have to save at every save button.
 - All questions unanswered will be highlighted in yellow.
 - It is recommended to view the questionnaire form and medications form using 1024 by 768 or higher pixel screen resolution

Name:	Demo, Edna	
Date of Birth:	7/4/1955	Home Phone:
User ID:	D1001	Work Phone: (865) 987-1234
Sex:	F	Job Title:
Supervisor Name:	Supervisor Work Phone:	
Medical Programs:		
673 - HRP - Human Reliability Program		
602 - Asbestos Medical Surveillance Program		
999 - Wellness Program		
606 - Beryllium Worker Program		

Do you have any of the following conditions that might cause a need for emergency contact? ☐ N/A

Epilepsy	Yes ☐	No ☐
Heart Disease	Yes ☐	No ☐
Diabetes	Yes ☐	No ☐
Lung Disease	Yes ☐	No ☐
Other	Yes ☐	No ☐

Do you ever have to stop for breath when walking at your own pace on level ground?

Yes ☐

No ☐

Do you ever have to stop for breath after walking about 100 yards (or after a few minutes) on level ground?

Yes ☐

No ☐

Are you too breathless to leave the house or breathless dressing or climbing or climbing one flight of stairs?

Yes ☐

No ☐

Close the questionnaire without saving any changes; follow instruction on exit page.

Save and close the entire questionnaire; follow instruction on exit page. Users can return later to complete the questionnaire.

Save the entire questionnaire; users continue completion of questionnaire.

An EMBOS questionnaire is associated with a patient record and contains questions that are dynamically generated based on a patient's current program enrollments. Answers from the previous patient's questionnaire are copied to the patient's new questionnaire.

A questionnaire can have one of three states, *Incomplete*, *Patient Complete*, or *Provider Complete*. The state of *Incomplete* is given to a newly generated questionnaire via POMS or EMBOS. The state of *Patient Complete* is given to questionnaires completed via POMS. The state of *Provider Complete* is given to questionnaires completed via EMBOS. A completion date is associated with a questionnaire if the questionnaire has a state of *Patient Complete* or *Provider Complete*. If a questionnaire has a state of *Provider Complete*, a Provider's signature will be printed on the questionnaire and document reports. The signature is based on the Provider associated with the questionnaire. A patient signature is associated with a questionnaire if the questionnaire is *Provider Complete* and a patient signature is captured during the provider completion of the questionnaire.

Questions may or may not be associated with one or more documents. A patient will only be asked a question once even if the question is associated with many documents. A patient document is associated with a questionnaire ID.

Questionnaire Rules

To maintain data integrity, the EMBOS application enforces the following rules:

- Once a questionnaire is marked *Provider Complete* it cannot be opened for edit
- A new questionnaire will be generated if no questionnaire exists for the patient, program enrollments changed, or questions have been added or removed from the question set
- If the questionnaire has changed because of new program enrollments/removals or question changes the provider cannot edit an expired questionnaire
- *Provider Complete* questionnaires and documents will contain the providers signature that marked the questionnaire *Provider Complete*
- *Provider Complete* questionnaire and documents will contain the patient signature if captured during the provider completion of the questionnaire

Tips on filling out Medical Questionnaire

- All questions unanswered since the last time you saved the questionnaire will be highlighted in yellow.
- Please save the questionnaire every 15 minutes to ensure your answers will be saved. You do not have to save at every save button.
- You can save and close at any point during the process and come back at a later date to finish filling out the questionnaire.
- The entire questionnaire will be saved when clicking the *Save* or *Save and Close* buttons on the questionnaire.

- The *Save* button will save the entire questionnaire and allow you to continue filling out your questionnaire. The *Save and Close* button will save the entire questionnaire and take you to an Exit page. The *Close* button will take you to an Exit page but will not save your questionnaire.
- Selecting N/A for a particular question constitutes answering no for that question as well as all of its sub-questions.

Tips for Proctoring a Patient filling out a Medical Questionnaire

- Once an employee's badge number and SSN have been entered, you will be prompted to close the Internet Explorer browser window which contains the *Proctor Form*. Please click *Yes* to close the *Proctor Form*. A new window with the patient's questionnaire will open and the patient can fill out the medical questionnaire.
- After an employee has finished the medical questionnaire, close the Internet Explorer browser window.
- To proctor additional employees, select or re-enter the EMBOS URL link in a new Internet Explorer browser window.
- For convenience, add the EMBOS URL to your Internet Explorer Favorites.

View Positive Hits Questionnaire

The EMBOS Questionnaire module provides users with *Positive Questionnaire Report*. Users can select to view only list of questions that patients marked *YES* as the answers. To view the report, highlight a questionnaire from the list and click on the button on the *Patient Questionnaires* toolbar.

Patient Questionnaires

ID	Create Date and Time	Status	Complete Date and Time	Provider
528	7/10/2008 9:33:52 AM	Incomplete		
233	8/10/2006 3:21:58 PM	Provider Complete	8/10/2006 3:28:44 PM	Whitaker, Robert

- View Positive Hits Questionnaire
- View Selected Questionnaire
- Open/Edit Selected Questionnaire
- Generate New Questionnaire

A PDF report dialog appears. User can print the report to a printer or save the report as a PDF file. The report can also be sent as an attachment via email by clicking on the button.

Positive Questionnaire Report

Identification Section

NAME (Last, First, MI) _____ USER ID S6100

DATE OF BIRTH November 01, 1974 AGE 36 SEX MALE RACE _____

JOB TITLE _____ ORGANIZATION CODE STAFFING _____

SUPERVISOR NAME _____ WORK PHONE _____

Complete Date: _____

Page 1 of 3

1 Do you currently have or have you had since your last examination any of the following

2 EYES

3 Wear glasses ☒ YES ☐ NO

4 Wear contacts ☒ YES ☐ NO

5 Color Blindness ☒ YES ☐ NO

Patient Documents

On the second tab of the *Patient Questionnaires Form*, patients' questionnaire documents are listed and can be viewed or printed. To view a questionnaire document, highlight one of the documents from the list and click on the button.

Patient Questionnaires

Patient Documents

Patient Documents

ID	Questionnaire ID	Document #	Document Title	Status	Complete Date and Time	Provider
7	1441	UCN17048	Medical History	Incomplete		
8	1441	UCN17080-A	Asbestos Medical Questionnaire	Incomplete		
12	1441	UCN17080-B	Beryllium Medical Questionnaire	Incomplete		

A PDF report dialog appears. User can print the questionnaire to a printer or save the questionnaire as a PDF file. The questionnaire can also be sent as an attachment via email by clicking on the button.

1 Do you currently have or have you had since your last examination any of the following

2 CARDIOVASCULAR

3 High blood pressure ☐ YES ☒ NO

4 Have you ever had treatment for high blood pressure. ☐ YES ☒ NO

5 Rheumatic fever ☐ YES ☒ NO

6 Heart valve problems ☐ YES ☒ NO

7 Any other heart problem about which you have been told? ☐ YES ☒ NO

8 RESPIRATORY

9 Recurrent or persistent cough ☐ YES ☒ NO

10 Cough producing sputum (phlegm) three or more days per week. ☐ YES ☒ NO

11 Wheezing ☐ YES ☒ NO

Page 1 of 11

EMBOS Reports

The EMBOS Reports module is accessed from the *Reports* tab on the EMBOS home page. As you can see, there are numerous types of reports that can be generated by EMBOS.

Generate a Report

Each report type is different, but they all share common properties. To demonstrate how to generate an EMBOS report, *Other Reports* is selected from the list of possible reports.

The *Other Report Form* then opens.

User ID: EMBOSAPPDV11A2B3 - Database: srsl.world - Active Schema: OPR\$EMBOS -- We...

Electronic Medical Business Operations System (EMBOS®)

Other Report Form For Test Purposes Only

Select Report Type: Clinical Note History

User ID or SSN: Search

Restrict Report to Date Range: ☐

Begin Date: 9/1/2011

End Date Date: 9/30/2011

Generate Report Close

From inside the Other Report Form, you first select the type of report you want to generate. Use the drop-down list in the *Select Report Type* field. For this example, *Patient All Report* is selected.

Electronic Medical Business Operations System (EMBOS®)

Other Report Form For Test Purposes Only

Select Report Type: Patient All Report

User ID or SSN: Search

Restrict Report to Date Range: ☐

Begin Date: 9/1/2011

End Date Date: 9/30/2011

Then enter the patient's User ID or SSN, or click the *Search* button to locate the User ID of the patient. In addition, a date range is selected for the report. When all the info is complete, the *Generate Report* button is clicked.

Electronic Medical Business Operations System (EMBOS®)
For Test Purposes Only

Select Report Type: Patient All Report

User ID or SSN: D1001 Search

Restrict Report to Date Range: ☒

Begin Date: 9/1/2011 ⌛

End Date: 10/4/2011 ⌛

Generate Report
Close

The following report is then generated.

Electronic Medical Business Operations System (EMBOS)

SRNS Medical Department

Patient ALL Report

Printed On: 10/04/2011 7:47:23 pm

Page 1 of 43

Patient: Demo, Edna L

Organization:

User ID: D1001

Org Code:

Medications

Brand Name	Drug	Start Date	Stop Date	Dose	Duration	Source
Amoxicillin trihydrate 500 mg caps Amoxil	amoxicillin	09-16-2011		500 mg BID		DP
Aspirin		05-01-2005		81 mg ONCEADAY		P
Diphenhydramine 50 mg caps Benadryl	diphenhydramine	10-04-2011	10-05-2011	4 cap QID	2 Days	DP
Metoprolol		01-01-2010		25 mg BID		P
Omega 3		10-04-2011	10-08-2011	16 cap QID	5 Days	P

This is a comprehensive report of everything in this patient's EMBOS record. Notice that the report is 43 pages long.

To print this report, use your mouse to point to the lower portion of the report until you see a toolbar appear. Then point to the printer icon on the toolbar, and the report will print.

Electronic Medical Business Operations System (EMBOS)
SRNS Medical Department
Patient ALL Report

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Patient: Demo, Edna L
User ID: D1001 Organization:
Org Code:

Medications						
Brand Name	Drug	Start Date	Stop Date	Dose	Duration	Source
Amoxicillin trihydrate 500 mg caps Amoxil	amoxicillin	09-16-2011		500 mg BID		DP
Aspirin		05-01-2005		81 mg ONCEADAY		P
Metoprolol		01-01-2010		25 mg BID		P
Omega 3		10-04-2011	10-08-2011	16 cap QID	5 Days	P

If the toolbar does not appear, right-click on the report and select *Print*.

If you want to save the report, click on the disc icon on the toolbar.

You will then be prompted to enter the location where you want to save the report.

EMBOS Administrator

The EMBOS Administrator module is used for configuration of application and data securities. It also has administrative functions to change some controlled data fields outside of routine users' operations. The EMBOS system uses a *Role Based* security model to organize data access for users of different work functions.

Administrator	Sign Off
Activity Role Permission Configuration	
Service Status Reset	

Activity Role Permission Configuration

From the EMBOS *Home Page*, click the *Administrator* tab from the menu bar and choose *Activity Role Permission Configuration* option. The *Activity Role Permission Configuration Form* appears. The form categorizes EMBOS application activities into three main groups; *Medical Activities*, *Medical Procedures*, and *Provider Activities*. When users pick an activity category from the drop-down list, a corresponding list of EMBOS service types is displayed on the table with options to *Create*, *List*, *Read*, *Update*, or *Delete* EMBOS records.

Electronic Medical Business Operations System (EMBOS®)
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Select an Activity Category: SRS Medical Activities ▼

Select a Role: EMBOS_NURSE_ROLE ▼

Type	Create	List	Read	Update	Delete
Administrative Consultation - Consult	☒	☒	☒	☒	☒
Administrative Consultation - Phone	☒	☒	☒	☒	☒
Annual	☒	☒	☒	☒	☒
Annual Hazwoper Medical Surveillance Exam	☒	☒	☒	☒	☒
Annual Respirator Clearance	☒	☒	☒	☒	☒
Arra Exam - One Phase	☒	☒	☒	☒	☒
Arsenic Exposure	☒	☒	☒	☒	☒
Asbestos Medical Surveillance	☒	☒	☒	☒	☒

SRS Medical Activities
 SRS Medical Procedures
 SRS Provider Activities

An EMBOS user account is tied to one or more security role(s) based on user's work functions. Below is the current list of available roles an EMBOS administrator can configure.

- ADMINISTRATOR_ROLE
- BE_ROLE
- DESIGNATED_PHYS_ROLE
- HRP_ROLE
- LAB_INTERFACE_ROLE
- LAB_ROLE
- NURSE_ROLE
- PHYSICIAN_ROLE
- RECORD_ROLE
- SCHEDULE_ROLE
- SOMD_ROLE
- XRAY_ROLE

There are five levels of security EMBOS users may have to work with patients/employees' records.

Create – Add new records to EMBOS database

List – View lists of certain records, activities, services, or procedures

Read – View contents of EMBOS records

Update – View and modify records

Delete – Remove certain records from the EMBOS database

The figure below displays an example of security settings of some *Medical Procedures* for EMBOS users with *Nurse Role*.

Select an Activity Category: SRS Medical Procedures ▼

Select a Role: EMBOS_NURSE_ROLE ▼

Type	Create	List	Read	Update	Delete
Breath Alcohol - Post Accident	☒	☒	☒	☒	☒
CBC	☒	☒	☒	☒	☒
CBC Manual Diff	☒	☒	☒	☒	☒
Check Blood Pressure	☒	☒	☒	☒	☒
Check Vitals	☒	☒	☒	☒	☒
Chemistry Panels	☒	☒	☒	☒	☒
Clinical Evaluation	☒	☒	☒	☒	☒
Clinical Interview	☒	☒	☒	☒	☒
Color Wire Vision	☒	☒	☒	☒	☒
Desensitization	☒	☒	☒	☒	☒
Diagnoses Evaluation	☒	☒	☒	☒	☒
ECG	☒	☒	☒	☒	☒

The security settings set by EMBOS administrators will reflect on certain forms that users access. The function buttons on each form are displayed based on the security settings of the roles users are members of. For example, a user with a role to list and view records of a certain activity will see only the blue eye button to view records listed on the form. On certain EMBOS forms, users with full access may see all four buttons on the toolbar depending on the functions of the forms.

Service Status Reset

The Service Status Reset module in EMBOS allows administrators to modify the status of services that have been marked and “Completed” by users. The *Service Status Update Form* appears when choosing the *Service Status Reset* option from the *Administrator* menu on the EMBOS *Home Page*. To change the status of a service, enter the service ID and click on the *Load Statuses* button.

Electronic Medical Business Operations System (EMBOS®)	
Service Status Update Form	For Test Purposes Only
<p>Service Number: <input type="text" value="127242"/> <input type="button" value="Load Statuses"/></p> <p><input type="button" value="Close"/></p>	
For Test Purposes Only	

The current saved status and detail of the service are displayed on the right side of the form. Choose a provider from the *Requested By* drop-down list. Pick the status requested and click on the *Apply Status* button. The particular service record will again be available for users to modify.

Electronic Medical Business Operations System (EMBOS®)
Service Status Update Form For Test Purposes Only

Service Number: 127242 Load Statuses

Requested By: < Select Provider >

Service Status: Completed Apply Status

Close

Service Details

Activity Type: Beryllium LPT
Patient: Edna L Demo
Provider: Betsy E Bridges
Start Date/Time: 09/15/2011 03:09 PM
Current Status: Completed

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Completed
Declined
In Process
Not Medically Indicated

■ **Services Performed for:** Demo, Edna L on Thursday, September 15, 2011 (Visit)

Service#	Start Date	Start Time	Description	Provider	Status
127247	9/15/2011	3:30 PM	Diagnoses Evaluation	Cosby, Otis	Completed
127246	9/15/2011	3:15 PM	Physical Exam	Cosby, Otis	In Process
127244	9/15/2011	3:10 PM	Desensitization	Boatman, Kathy	Completed
127241	9/15/2011	3:05 PM	Check Vitals	Shelton, Patsy M	Completed
127242	9/15/2011	3:05 PM	Beryllium LPT	Bridges, Betsy E	In Process
127238	9/15/2011	3:05 PM	Beryllium Assessment	Beryllium, Tommy	Completed
127243	9/15/2011	3:05 PM	Clinical Evaluation	Blazer, Ruth A	Completed