

eSP™ TRAINING MANUAL

MARYLAND EARLY HEARING DETECTION AND INTERVENTION PROGRAM



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Last Updated October 3

LOGGING IN

Logging into eSP™ is easy and fast, all you need is a working internet connection and a username and password (assigned to you by your Program Manager). Once you have these things, you're ready to log in.

My eSP™ site address:	https://www.mdehdi.com
User Name	
Password	Please record your password in a safe place where other users will not have access to it.

If you are having trouble accessing your eSP™ site, please check to see if you are connected to the internet before contacting the help desk. If other websites are working, and eSP™ is unavailable, please contact support (See page 5).

NAVIGATING BETWEEN MULTIPLE FACILITIES

If you perform screening or other eSP™ tasks at multiple facilities it is easy to navigate between these facilities. You will NOT need multiple user names and passwords regardless of the number of facilities you belong to.

Once you have entered your username and password, eSP™ will prompt you to select your location. If you do not see your location in the drop down menu, please contact your Program Manager for access rights.

Now that you have selected your facility, the name will be displayed in the top left side of the screen while you are logged in.

You can change facilities without logging out of eSP™. Simply click on **Select Facility** on the top right of the screen and select the facility you want to navigate to.



SECTION 1

GETTING STARTED

Learning Objective

To gain an understanding of what is needed to begin using eSP™, and demonstrate the ability to log on to the system.

TOPICS COVERED

1. Logging in to eSP™ Page 3
2. Navigating between multiple facilities Page 3
3. Locate help text and support contacts Page 4
4. Quick Link functions Page 4

WHAT YOU WILL NEED FOR THIS SECTION

1. Username and Password

LOCATING HELP AND SUPPORT FOR eSP™

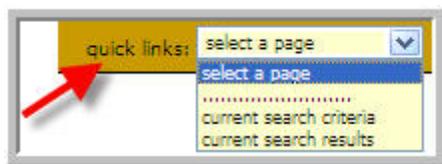
When you need help with eSP™, there are several options:

1. Once you're logged in, click on the **Help** button on the bottom left of the screen. This will take you to the help text. From there you can find help with menu items and screener and program manager tasks.
2. You can also contact the help desk by phone and email

SUPPORT INFORMATION:	
Support Hours:	Monday-Friday 8:30 a.m. to 5:00 p.m. EST
E-mail:	ozhelp@oz-systems.com
Contact Phone Number:	888-727-3366 ext 2

QUICK LINKS

The **Quick Link** drop down menu is located in the top right section of the screen. This menu allows you to navigate between different pages quickly without having to use the Tabs on the left side of the screen.



SECTION 2

LET'S GO ON A PATIENT JOURNEY

Learning Objective

To gain knowledge and practice in adding and editing patient records in eSP™.

TOPICS COVERED

- 1. Patient Journey Overview Page 7
- 2. Data Requirements Page 12
- 3. Adding a Risk Factor Page 13
- 4. To Do Lists Page 14
- 5. Importing Screening Results Page 15
- 6. Assigning Screening Results Page 17
- 7. Adding a Professional Contact to a Patient Record Page 20
- 8. Creating Follow-up Appointments/ Making Referrals Page 21
- 9. Letters Page 22

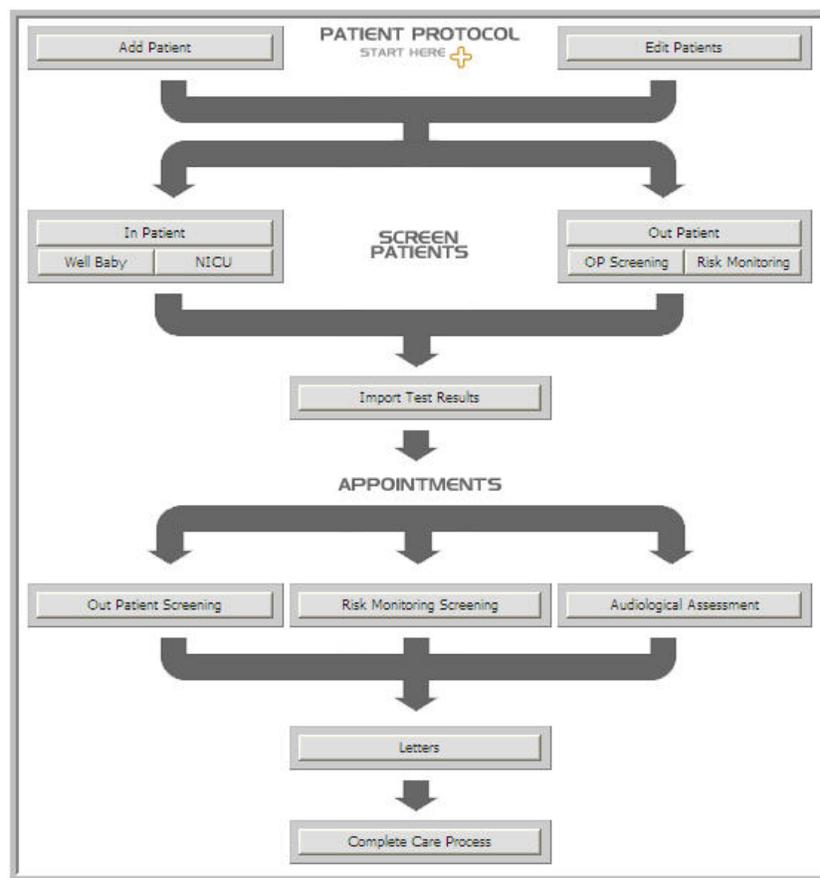
WHAT YOU WILL NEED FOR THIS SECTION

- 1. Required information for patient record (i.e. Patient DOB, MRN, Contact info, etc.)
- 2. List of your screening equipment and model type for exam result imports.

PATIENT JOURNEY OVERVIEW

The **Patient Journey** page is designed to serve as a guide to everyday hearing screening tasks, as well as a resource for locating patients and their care status. Becoming familiar with the Patient Journey page will enable you to navigate quickly and easily through most daily tasks in eSP™. You will find that most tasks in your daily screening/program management will be obtainable via a link from the Patient Journey, including adding patients, editing records, and importing the test results. The Patient Journey is not only available for patients in Birth Admit status, but can be utilized to track patients who may need additional care after discharge from the birth facility. You will find that each button on the Patient Journey page is a link to a list of patients requiring **DIFFERENT** levels of care.

Once the patient finishes the Journey, they will no longer be displayed in any of the outstanding tasks lists, and their care can be considered complete.



TIP

To access the Patient Journey Page:

1. Click on the Patient Tab
2. Click on Patient Journey

The following table gives a brief overview of the function of each button on the Patient Journey.

Patient Protocol	
Add Patient	Add a new record
Edit Patient	Generates a list of all In Process patients for Editing
Screen Patients	
In Patient	Generates a list of all patients classified as inpatient who have not yet been screened or not yet passed both ears
Well Baby	Generates a list of all patients located in the well baby nursery who have not yet been screened or not yet passed both ears
NICU	Generates a list of all inpatients located in the NICU nursery who have not yet been screened or not yet passed both ears
Outpatient	Generates a combined list of outpatient (OP) screening (follow-up) and risk monitoring patients who are pending screening
OP Screening	Generates a list of OP screening (follow-up) patients who have a scheduled appointment and are pending screening
Risk Monitoring	Generates a list of Risk Monitoring patients who have a scheduled appointment and are pending screening
Import Test Results	Import exam results from screening equipment
Appointments	
Out Patient Screening	Generates a list of patients needing appointments for outpatient screens
Risk Monitoring Screening	Generates a list of patients needing appointments for risk monitoring
Audiological Assessment	Generates a list of patients needing appointments for an audiological assessment
Letters	Generates a list of patients needing letters
Complete Care Process	Generates a list of patients needing to complete the care process

MDEHDI DATA REQUIREMENTS

The State of Maryland requires that every patient record contain a minimum amount of essential information. The following table reflects the requirements for your state.

ELEMENTS REQUIRED FOR ALL NEWBORNS:

1. Patient's First and Last Name	10. Mother's Date of Birth
2. Hospital Medical Record Number	11. County of Birth (part of facility information)
3. Blood Spot Card Number	12. PCP to patient's professional contacts
4. Date of Birth	13. Time and date of exam (included in screening import)
5. Gender	14. Technology used for exam (selected at time of screening import in eSP™)
6. Consent/no consent for screen (default is Full)	15. Who performed exam (selected at time of screening import in eSP™)
7. Nursery	16. Ear examined (included in screening import)
8. Mother's Last Name	17. Screening results (included in screening import)
9. Mother's Address, City, State, and Zip	18. Date, Time and Outcome reported to parents and physician (generate letters)

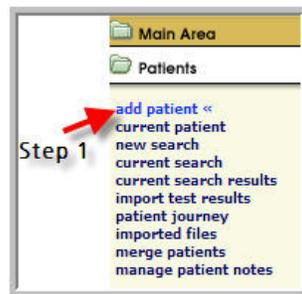
TIP

If your hospital uses demographic imports, make sure that items 1-9 are included in your import file (For more information, refer to the [Data Import Dictionary](#) in Appendix E).

ADD RISK FACTORS TO PATIENTS IN eSP™

Risk factors associated with hearing loss can be added to a patient’s record when they are added to eSP™, by manual entry or electronic import. Refer to the section on demographic imports for more information on the electronic import of risk factors.

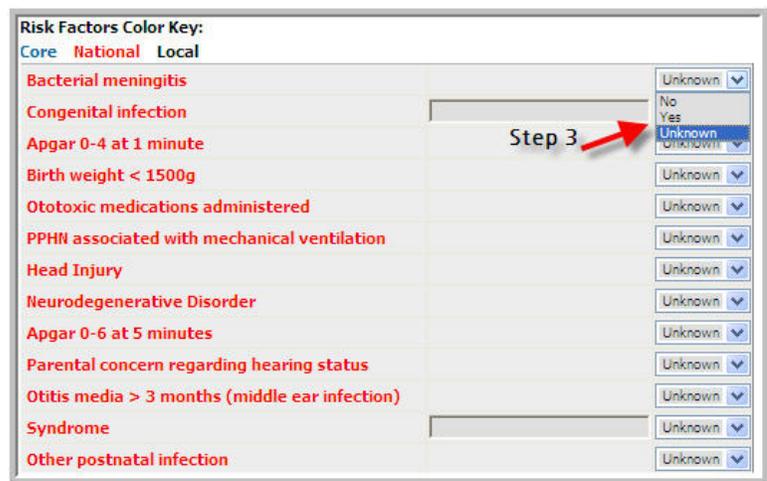
Step 1: Click on Add Patient.



Step 2: To add Core Risks select Yes, No, or Unknown from each drop down.



Step 3: To add Other Risks, click on the box labeled other risks. Select the appropriate Yes, No, or Unknown for each risk factor. You can opt to set all risk factors to No if it is appropriate.

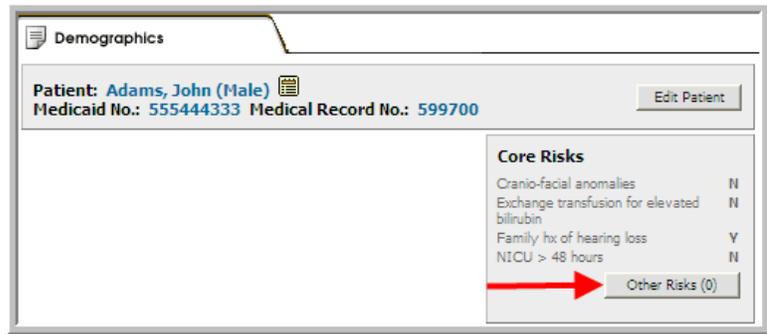


Step 4: Save these changes.



TIP

Risk Factors can be updated or changed from the patient demographics screen. Click on the Other Risks button to edit risk factors.



TO DO LISTS

eSP™ has the ability to create a list of patients that need screening based on their inpatient or outpatient status. The Patient Journey can be used to generate these To Do lists. The following table describes the types of lists available from the Patient Journey page:

To Do Lists	
In Patient	Generates a list of Well Baby and NICU patients who are in the hospital and who have not been tested or passed both ears
Well Baby	Generates a list of Well Baby patients who are in the hospital and who have not been tested or passed both ears
NICU	Generates a list of NICU patients who are in the hospital and who have not been tested or passed both ears
Outpatient	Generates a combined list of outpatient (OP) screen (follow-up) and risk monitoring patients pending screening
OP Screening	Generates a list of OP screening (follow-up) patients who have a scheduled appointment and pending screening
Risk Monitoring	Generates a list of Risk Monitoring patients who have a scheduled appointment and pending screening

IMPORTING SCREENING RESULTS

SETTING UP THE SCREENING EQUIPMENT FOR USE WITH eSP™

1. Set up your screening technology.
2. Find out where your hearing screening software is saving the test results. We have provided you with the default location that the manufacturer of the screening equipment has set it (See Appendix D), but please contact the manufacturer of the equipment if you would like to change this default location.
3. Find out the name of the test result file that you will be importing into eSP™. We have provided you with the default name (See Appendix D).

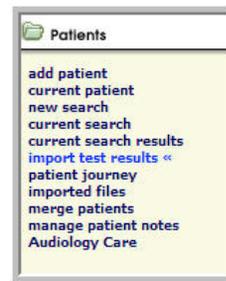
Find out how to send test results from your screening software to the folder where eSP™ will find it. If you don't already know the answer to this, please contact the manufacturer of your screening equipment.

MANUFACTURER CONTACTS

Manufacturer	Phone Number	Email/Website
BIO-LOGIC	800-323-8326	BLSC_Hearing_Support@natus.com
GSI	800-700-2282	http://www.viasyshealthcare.com/contact_us/contactUs.aspx?config=cu_contactTech&mode=c
ETYMOTIC/ MAICO	888-941-4201	customer-service@etymotic.com info@maico-diagnostics.com
MADSEN/ OTOMETRICS	800-289-2150	http://www.otometrics.com/index.htm
NATUS	800-255-3901	technical_service@natus.com
OTODYNAMICS	800-659-7776	www.otodynamics.com
SLE/NEUROSOFT	800-474-7875	techsup@neuroscan.com
SONAMED	888-766-2633	technicalservices@sonamed.com
STARKEY	800-328-8602	http://www.starkeypro.com/

 IMPORT TEST RESULTS INTO eSP™

Step 1: Click on the **Patients** Tab.

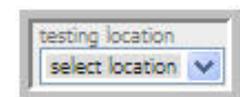


Step 2: Click on the **Import Test Results** option.

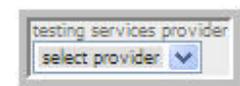
Step 3: Click on the check box to verify that these test results are for the facility listed.



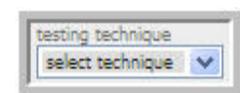
Step 4: Select the **Testing Location** (Inpatient/Outpatient).



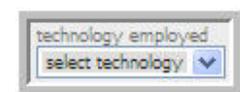
Step 5: Select the **Testing Services Provider** (Your facility).



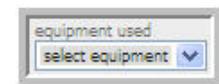
Step 6: Select the **Testing Technique** (DPOAE, TOAE, or AABR).



Step 7: Select the **Technology Employed** (AudX, Echo-Screen, Algo...). If you choose the wrong technology your test results will be listed under the heading, "Test Results Needing Repair". You will need to click the repair button. You will need to choose the correct technology that was employed for the test results to be successfully processed.



Step 8: Select the **Equipment** (This is used only if you have set this up because you have multiple machines for the same technology).



Step 9: Select the **Test Type** (Birth Screen, Out Patient Screen).



Step 10: Select the **Screener** (if there were multiple screeners, there is an option for that at the bottom).

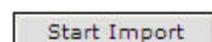


NOTE: IF YOU SELECT MULTIPLE SCREENER, YOU WILL NEED TO CLICK ON THE [REPAIR BUTTON](#) TO ASSIGN THE SCREENER THAT PERFORMED EACH EXAM.

Step 11: Click **Browse** to find the test result file. (i.e. A:/unhs.oz), and then click **open**.



Step 12: Click **Start Import**. Test results that have assigned automatically will be located under the heading, "**Test Results Successfully Processed**". If all your test results appear in this list, you're done importing test results!



ASSINGING TEST RESULTS

If there are test results that are listed under the heading, "**Test Results to Assign**" you will see a list of test results that did not match existing patient records. This may be due to the records not being entered into eSP™ prior to importing the test result or the names, medical record numbers, or date of birth were not entered exactly the same as it was in the screening technology. Follow the steps below to get those test results entered in to a patient record.

Step 1: Click the **Assign** button to the left of the patient's name. This takes you to the **Test Result Import: Locate Patient** search screen.

	Name	Ref No.	Ear	Result	Screened	Screeener	Process?
assign	Curling, Baby	1083	R -	Pass	02/04/2006 10:09:07	orneles, melissa	set to no

If you know the patient has been entered into eSP™ prior to importing the test results, check the spelling of the name, case number and date of birth for errors. You may need to delete the names and case number and just search by date of birth to find the patient.

Test Result Import: Locate Patient
use the search boxes to search for and locate the corresponding patient for the failed import data. Once you have located the patient, check the select button and click the Use Selected Patient button at the bottom of the search results.

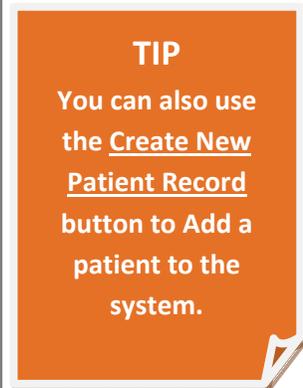
Name: , (Last name, First name)
wildcard searches are permitted using the percent symbol (e.g. Smi%)

Medicaid No. **Medical Record No.**

Date of Birth: born between: and

Search Results:
The following patients are possible matches for the the failed import data you are trying to repair, if the correct patient is not among the search results, please use the search fields above to locate the correct patient.

No Patients Were Found...



Step 2: Once the patient is found in the search, click the **Select** button to select that patient as being the correct one. (Caution: check each element, name, case number, and date of birth to ensure this is absolutely the correct patient).

Search Results:
The following patients are possible matches for the the failed import data you are trying to repair, if the correct patient is not among the search results, please use the search fields above to locate the correct patient.

	Name	Medicaid No.	Medical Record No.	BirthDate	Nursery
Select	Curling, Baby		1083	3/26/2008	Well Baby

If you have NOT entered this patient's demographic information (name, case number and date of birth as a minimum) in eSP™ you will need to click **Create New Patient Record**.

Step 3: The Add Patient Screen will populate the information from the screening technology. Edit the patient's information from here if you want (pay particular attention to the gender and DOB), or **Save and Finish** if you are done editing the patient.

Step 4: If you have more than one patient that needs to be assigned or created, go to the **Quick Links** drop down list at the top right corner of the screen and select **Current Imported File**.



Step 5: Repeat the process until you have assigned all of your patients' tests results and they are all listed under the "Test Results Successfully Processed" heading.

Test Results Successfully Processed:						
	Name	Ref No.	Ear	Result	Screened	Screeener
view	Curling, Baby	1083	R -	Pass	02/04/2006 10:09:07	ornelas, melissa
view	Curling, Baby	1083	- L	Pass	02/04/2006 10:09:08	ornelas, melissa

Step 6: Go to wherever your screening data file is located and delete it.



ADDING PROFESSIONAL CONTACTS TO A PATIENT RECORD

A Professional Contact is one who provides a service to the patient. Such service types include PCP/Medical Home and OP Screen. Multiple contacts can be added to a patient record (both facilities and individual providers). Adding a professional contact to a patient record gives the provider access to the patient information and the ability to participate in the patient care process.

Step 1: Access the patient record to add a professional contact.

Step 2: Click the **Add Professional Contact** button on the bottom right side of the screen.

Patient Professional Contacts:			
	Name	Service Type	Phone
View	Hart Medical Center	Birth Screen Provider	214-631-6161
			Add Professional Contact

Step 3: Search for the Professional contact you want to add to the record.

Step 4: Use the drop-down menu to select the service that the professional contact provides.

Step 1: Select A Service:
Use the drop-down list below to select the type of service you wish to assign a provider for.

select a service

Step 5: Using the radio buttons, select a search for a person or a place. And click the **Locate Professional Contact Button**.

Step 2: Select Professional Contact:
Please click the 'Locate Professional Contact' button below to search for and select a professional contact to assign to the patient's record. Once a contact has been located and is displayed below, you may click the 'Save And Continue' button to add the professional contact to the patient's record.

choose one: search for person search for place (facility)

Step 6: This will take you to a search screen where you can enter information on the person or place you are searching for. When you have found the correct person or place, click the **Select Button** next to the name .

Step 7: Now click the **Save and Return to Demographics Tab** button. You should now see the contact you selected listed at the bottom of the Demographics page.



CREATING FOLLOW-UP APPOINTMENTS/MAKING REFERRALS

Creating appointments in eSP™ is a three-step process. The first step is changing the patient location to **Outpatient**. This notifies eSP™ that the patient is no longer available for the birth admit screen triggering the system to calculate the **Birth Screening Outcome** and determine if further care is required. The second step in creating an appointment, is adding a **Professional Contact** (doctors office, outpatient clinic, etc.) to the patient record. The third step is the creation of the appointment in the hearing tab on the patient record. After you have imported/entered test result data, completed all birth admit screen, and added a professional contact, use the following instructions to create a new appointment.

Step 1: Use the radio buttons in the **Location** section to select the **Outpatient** option. If you do not select the outpatient option, you will not be able to make appointments for the patient.

Step 2: Now click on the **Hearing** tab.



Step 3: To schedule an appointment, click the **Edit** button.

Description	Status	Appointment	
Birth Screen	Unilateral Referral		
Outpatient	Required - Not Scheduled	Appointment Required	edit

Step 4: Use the radio buttons to select the facility where you wish to schedule an appointment.

Patient Professional Contacts:		
Name	Service Type	Phone
<input type="radio"/> Hart Medical Center	Birth Screen Provider	214-631-6161
<input checked="" type="radio"/> AUDIOLOGY CLINIC	OP Screening	55678

Add Professional Contact

Step 5: Set the appointment date and time, enter any appropriate notes for this appointment, and click the **Save & Return to Hearing Tab** button.

Step 6: The appointment should now reflect a **pending** appointment. The outpatient provider will be able to enter test results and schedule additional appointments for this patient.

Outpatient	Required - Pending	03/26/2008 08:30:00	edit
------------	--------------------	---------------------	------

TIP
You can use the **Edit** button to make changes to an appointment.

LETTERS IN eSPT™

Generating, assigning and printing letters from eSPT™ can save time in your daily hearing screening process. In the State of Maryland, hospitals are free to use letter templates designed by the State, or “local” letter templates from the hospital. This section will describe the steps to create new letters, and generate letters for patients in eSPT™.

CREATING NEW LETTER TEMPLATES IN eSPT™

The letters creation process begins in the *Letters Library*. The letters library contains a list of available letter template which has been uploaded into eSPT™. It also contains the basic documents that are required to create a merge letter to use with the fields in the eSPT™ database. These documents work together to combine the correct demographic and outcome data for each letter.

To create new letter templates, follow the steps listed below:

Step 1: Create a place on your computer or network to save letter templates (i.e. C:\Desktop\eSPletters). Select a directory that is easy to recognize. We recommend using eSP Letters as the name.

Step 2: At the main menu, click the **Letters** tab.



Step 3: Click the **library** option.

Step 4: In the **Master Documents** section, click on the Word Document icon representing the **Blank Letter Template**. If you prefer to use a sample template, click on one of the generic/sample enterprise templates.

Step 5: At the file download warning, click the **Save** button.

Step 6: Browse to the designated eSPT™ letters directory (established in Step 1) and click the **Save** button.

Letter Library:			
Master Documents			
	Blank Letter Template		
	Merge Code Data Source		
Enterprise Templates			
Active	BA Pass Both	06/01/2004 7:18:28	
Active	Contact BA Missed	06/01/2004 7:20:55	
Active	Contact Pass Neither	01/04/2005 17:58:53	
Active	ESP Default Build Template [Do Not Modify]	02/20/2003 23:24:18	
Active	No Template Specified	02/14/2003 22:56:36	
Active	Sample -- Refer Both	02/11/2004 15:23:08	
Active	SIMS Letter Marker	08/13/2003 18:24:44	
Active	Vietnamese letter	05/16/2006 13:21:02	
Local Templates			
<input checked="" type="checkbox"/>	Active	Alison's test	02/21/2008 9:13:47

Step 7: At the letter library page, click the Word document icon representing the **Merge Code Data Source** .

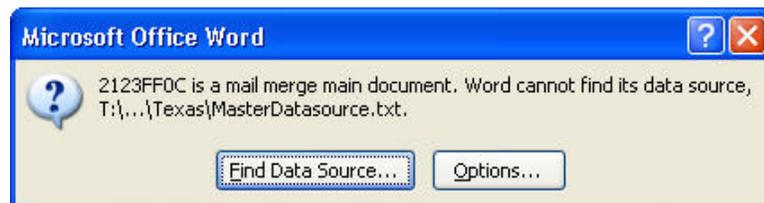
Step 8: At the file download warning, click the **Save** button.

Step 9: Browse to the designated eSPT™ letters directory (from Step 1) and click the **Save** button.



Step 10: Browse to the designated eSPT™ letters directory and open the **Blank Letter Template.doc**.

Step 11: At the Microsoft Word message window, click **Find Data Source**.



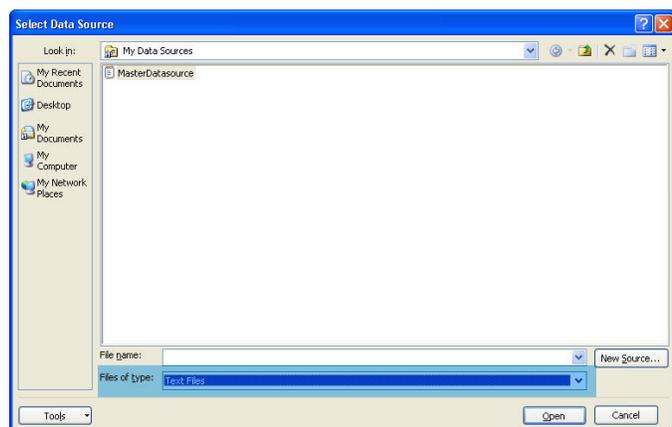
TIP

Some versions of Word automatically open the datasource for you. If you cannot find the datasource, please contact OZ Support for assistance.

Step 12: Browse to the designated eSPT™ letters directory.

Step 13: At the Open Data Source Message Window, click **Files of Type** drop down and select Text Files (*.txt).

Step 14: Select **MasterDataSource.txt** and click **Open**.



Step 15: At the Header Record Delimiters message window, verify that **Field Delimiter** is set to (Tab) and **Record Delimiter** is set to (Enter). Click the **OK** button.

Step 16: Edit the Word document as desired and insert logos as necessary.



Step 17: To insert merge fields, click on **Insert Merge Field** button on tool bar.



Step 18: Click **Save** when editing is complete and name the document so that it is easily recognized as the type of letter it is (i.e. Pass Both Contact).

UPLOAD NEW LETTER TEMPLATE TO eSP™

Once a letter has been modified and is ready for use, the template needs to be uploaded. This must occur prior to assigning any letters.

Step 1: At the main menu, click the **Letters** tab.

Step 2: Click the **library** option.



Step 3: In the **Add A New Local Template** section, type in a Description for the letter template to upload.

 A screenshot of a form titled "Add A New Local Template:". It contains three main fields: a "Description:" text box with the text "PCP Pass Neither" entered; a "Template File:" text box with a "Browse..." button to its right; and a button at the bottom labeled "upload new template".

This is what you'll see in the template drop down when you go to assign letters, so make sure it is descriptive so you know exactly what letter is for what screening outcome and who it is addressed to. (Ex: <hospital name> BA Contact Pass Both - Spanish).

Step 4: Click the **Browse** button next to the Template text box and navigate to the designated eSP™ Letters directory and click **Open** on the file to upload.

 A close-up screenshot of the "Template File:" field from the previous form, showing the text box and the "Browse..." button.

Step 5: Click the **Upload new template** button in eSP™ to add this file to the letter library.

 A close-up screenshot of the "upload new template" button from the previous form.

You should see each new or updated template's description appear under the Local Templates heading. Once you have all of your templates listed, you are ready to assign and require the letters.

PRINTING LETTERS

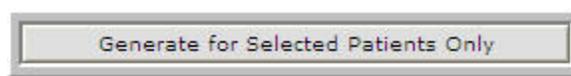
Step 1: Click **Patient Journey**; then click the **Letters** button.



Step 2: On the **Generate Letters** screen, click the check box in front of each of the patients for whom you would like to generate a letter (eSPT™ will generate a maximum of 75 letters at a time).

Generate Letters:					
	Patient Name	Medicaid No.	Medical Record No.	Letter Topic	Recipient Type
<input checked="" type="checkbox"/>	Baby Elephant		1005	Birth Admit - Pass One	Contacts
<input type="checkbox"/>	Baby Lavendar		1031	Birth Admit - Pass Both	Contacts
<input checked="" type="checkbox"/>	Baby Navy		1033	Birth Admit - Pass Both	Contacts
<input type="checkbox"/>	Baby Olive		1034	Birth Admit - Pass Both	Contacts
<input checked="" type="checkbox"/>	Baby Periwinkle		1035	Birth Admit - Pass Both	Contacts
<input checked="" type="checkbox"/>	Baby Teal		1038	Birth Admit - Pass Both	Contacts

Step 3: Click the **Generate for Selected Patients Only** button.



You will be directed to a page that lists the status of the letter generated, the patients selected, the user who generated the letter and the date that it was submitted;

Listed below are the letters you have created. If the letter status is 'completed', this letter is available for viewing and/or printing.

Documents since: 3/18/2008 Filter Date

	Status	Patients	Info	User	Submitted
	Complete	Elephant,Navy,Per...		Hart, Alison	3/26/2008 2:50:00 PM

Step 4: Click the **Microsoft Word 'W'** icon in front of the letter that you want to print. This will open up the letter(s) in Microsoft Word (all the letters you selected will be included in one Word document).



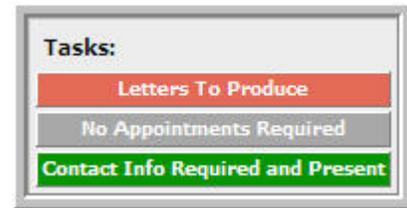
Step 5: Print the letter(s) from **Microsoft Word**.

TIP

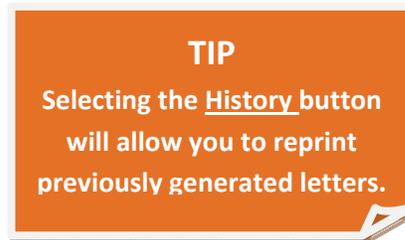
Generating letters in eSPT™ does not actually send letters to a printer, it only generates a Word file. Your computer must be connected to a printer to Print the letters from Word.

PRINTING FROM THE PATIENT'S DEMOGRAPHIC TAB FOR AN INDIVIDUAL PATIENT

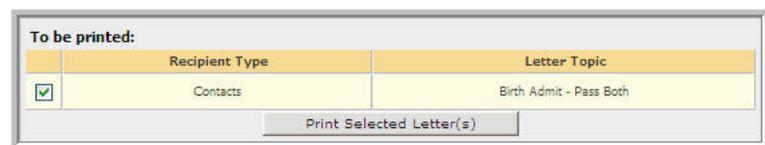
Step 1: In the **Tasks** section, click the **Letters to Produce** or **No Letters to Produce** button.



Step 2: If you are going to re-print a letter that has already been printed, or if you are trying to print a letter that is not a required letter select the **Available** radio button.

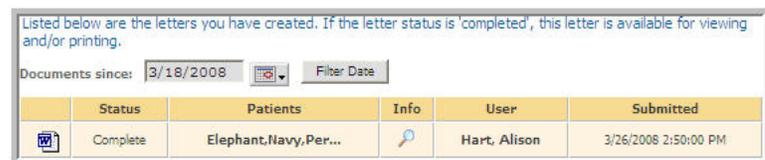


Step 3: Click the check box in front of each of the letters you want to print.



Step 4: Click the **Print Selected Letter(s)** button.

You will be directed to a page that lists the status of the letter generated, the patient selected, the user who generated the letters and the date that it was submitted;



Step 5: Click the **Microsoft Word 'W'** icon in front of the letter that you want to print. This will open up the letter(s) in Microsoft Word;



Step 6: Print the letter(s) from **Microsoft Word**.

SECTION 3

MANAGING SYSTEM INFORMATION

Learning Objective

To gain knowledge in editing patient and user information in eSP™.

TOPICS COVERED

1. Editing Patient Records Page 31
2. Transfer to another hospital Page 32
3. Searching Page 33
4. Editing user preferences..... Page 41
5. Managing Risk Factors Page 42

EDITING PATIENT RECORDS

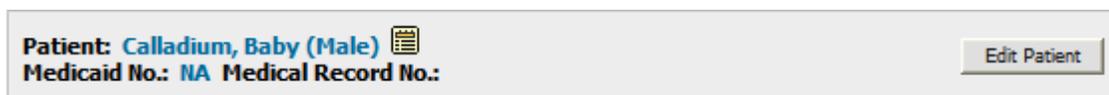
This section allows the user to modify basic demographic information that has changed since the patient record was first created. Many times a newborn has a hearing screening before he/she has been given a name. If you are seeing a patient for the second or third time, make sure that all the demographic information is current.

INDICATE REFUSED/DECEASED STATUS

REFUSED

It is important to keep records in eSP™ current and accurate. In some cases, families may refuse screen. When this happens, the refusal should be reflected in the patient's record.

Step 1: From the demographics page, click on the **Edit** button next to the baby's name.



Step 2: Use the drop down menu to select "refused" in the **Status** field.

Step 3: Click **Save and Return to Demographics Tab**.

DECEASED

When a patient dies, it is very important to indicate this in the patient record. This notifies eSP™ and other providers that the parents will not be contacted concerning the hearing screen.

Follow the previous steps for **refused** patient status. Instead of selecting refused in **Step 2**, select **deceased**.

TRANSFER OUT OF LOCAL CARE IN eSP™

When a patient transfers to another facility, it is important to record this change in eSP™. In order to keep your statistics as accurate as possible and to have a consistent way that each hospital is managing transferred patients, please follow the protocol below when a patient is transferred to a different facility:

Step 1: Add the facility the baby is transferring to as a **Birth Screen Provider**.

Patient Professional Contacts:			
	Name	Service Type	Phone
View	Hart Medical Center	Birth Screen Provider	214-631-6161
Add Professional Contact			

Step 2: From the demographics screen, click on the **Add Professional Contact** button in the **Patient Professional Contacts** section at the bottom of the screen (If you need more help in adding a professional contact, see page 20).

TIP

All birth facilities in Maryland have been added in eSP™. If you are having trouble locating the name of the facility in the search, please call as at 888-727-3366 ext 2.

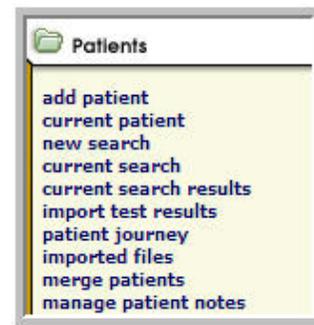
Step 3: **REMOVE** the birth facility (your facility) as a Birth Screen Provider for this patient. You will no longer have access to this patient's record, but for consistency throughout the state this protocol has been put into place.

Patient Professional Contacts:			
	Name	Service Type	Phone
View	Demo Birth Facility	Birth Screen Provider	
View	Hart Medical Center	Birth Screen Provider	214-631-6161
Add Professional Contact			

SEARCHING

GENERAL SEARCHES

The search feature allows users to find patients using specific demographic or exam details.



Step 1: At the **Main Menu**, click the **Patients** tab.

Step 2: Click the **New Search** option.

Step 3: Set Search Criteria to narrow the search for a specific patient or group of patients (i.e. Name or Date of Birth).

Step 4: Click the **Submit Search Criteria** button towards the bottom of the screen.

Patient Search Criteria:

Name: , (Last name, First name)
wildcard searches are permitted using the percent symbol (e.g. Smi%)

Medicaid No.: **Medical Record No.:**

Date of Birth: born between: and

Confidential ID:

Patient Location:
 inpatient
 outpatient
 either

Birth Admission:
 in process
 complete
 either

Nursery: Well Baby
 NICU
 Other

Additional Search Criteria:
 Use the buttons below to apply more advanced search criteria to your patient search.

PATIENT SEARCH FIELDS DEFINED

Name (Last, First)	Enter in the first letter(s) or entire first or last name to search for in the appropriate text box
Blood Spot Card No.	Enter Blood Spot Card No. to search for in the text box
Blood Spot Card No.	Enter the Blood Spot Card No. to search for thin the text box
Date of Birth	Click the calendar or type in the date (mm/dd/yyyy) for "born between" "and" text boxes
Confidential ID	Enter Confidential ID, which appears in the name field of the record, to search for a confidential patient identifier. The patient may be confidential or disclosed at your facility and will display regardless of disclosure based on this identifier
<div style="display: flex; justify-content: space-between; align-items: center;"> <div data-bbox="203 850 868 961" style="border: 1px solid gray; padding: 5px;"> <p>Patient: Outpatient, PassOne (Male)  Confidential ID: 1000420000000000004 Medicaid No.: NA Medical Record No.: 345-1111</p> <p style="text-align: right;"><input type="button" value="Edit Patient"/></p> </div> <div data-bbox="950 766 1412 1050" style="background-color: #f4a460; padding: 10px; border: 1px solid #ccc; border-radius: 5px;"> <p style="text-align: center; margin: 0;">TIP</p> <p style="text-align: center; margin: 5px 0 0 0;">To view the Confidential ID for any patient, simply click the notepad icon next to the patient name on the demographics page.</p> </div> </div>	
Patient Location	Click the radio button next to inpatient, outpatient or either to indicate the patient location to search for and display in the search results
Birth Admission	Click the radio button next to in process , complete , or either to indicate the status of the birth screen to search for and display in the search results
<p>In Process will display patients who are still in the hospital and have not passed both ears or have not been tested</p>	
<p>Complete will display patients whose birth screen outcome is pass both ears and those who have not passed both ears or have not been tested and have been marked as outpatient</p>	
<p>Either will display all patients who are in process or complete as described above</p>	
Nursery	Place a checkmark in the box(es) next to the Nursery level to search for. More than one may be selected. The Check All button may be clicked to check all nursery levels. The check all button will read Uncheck All when all levels are checked

Additional Search Criteria

Professional Contact	This search button will allow the user to set the search criteria to produce a list of patients specific to a certain professional contact or service provider
Demographics	This section allows the search limits to be set to meet specific demographic information such as gender, weight, race, and/or contact information
Patient Status	This section narrows search results to display patients meeting selected screening outcome criteria. Outcomes for each of the levels of screening can be set and used in combination with the other search criteria
Test Results	This section narrows searches to specific exam results combinations for individual ears
Hearing Risks	This section sets search limits to display a list of patients that have certain risk indicators set in their record. Hearing risks criteria can be set to include specific risk factors or a minimum/maximum number of risk indicators set for given patients

SAVING SEARCH CRITERIA

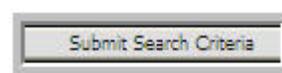
The search feature allows users to save search criteria that will be used frequently to eliminate the need to reset search criteria each time the search is utilized.

Step 1: Follow steps 1-3 in the previous instructions for general searches.

Step 2: Before clicking the **Submit** button, enter a description for the current search criteria in the field next to the **Save This Search** button.

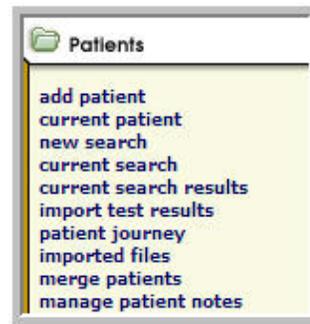
Step 3: Click the **Save This Search** button. Your search will appear in the Saved Searches section and will be available for you to load for future searches.

Step 4: Click the **Submit Search Criteria** button.



FINDING PATIENTS NEEDING OUTPATIENT FOLLOW-UP SCREEN IN eSP™

Step 1: Click **Patient Journey** on the **Patients** tab.



Step 2: Click the **Outpatient Screening** button.



Step 3: This generates a list of any patient that has referred or missed the birth screen that needs a follow-up screen.

Patient Journey: Appointments - Outpatient

Note: Using the sort options at the top of the search results will re-sort your entire result set and return you to page one of your search results.

	Name	Medicaid No.	Medical Record No.	BirthDate	Nursery
view	Outpatient, PassOne		345-1111	01/04/2008	Well Baby
view	Outpatient, PassNeither		345-1112	01/14/2008	Well Baby
view	Outpatient, ReferLeft		345-1113	01/24/2008	Well Baby
view	RiskMonitoring, Patient		345-1114	01/30/2008	Well Baby
view	Inpatient, ReferRight		345-1115	01/01/2008	Well Baby
view	Hart, Baby		383746	03/06/2008	Well Baby

total patients found: 18

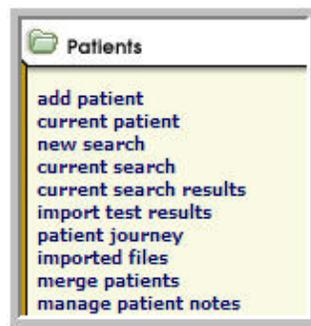
TO-DO EXPORT RESULTS MODIFY SEARCH NEW SEARCH < PREV 1 NEXT >

TIP

- Use the drop down menus (Name, Medical Record No. etc.) to sort the list.
- The TO-DO button will allow you to print the list.

FINDING PATIENTS THAT REFERRED ON THE BIRTH SCREEN

Step 1: Click **new search** on the Patients tab.



Step 2: Enter the dates of birth you are searching for (e.g. if you are searching for babies that were born in May but did not pass the birth screen, enter 05/01/2007 – 05/31/2007).

Step 3: Click on **Patient Status**.

 A screenshot of the "Patient Search Criteria" form. It includes fields for Name (Last name, First name), Medicaid No., Medical Record No., Date of Birth (born between: [start date] and [end date]), and Confidential ID. There are three sections with radio buttons: Patient Location (inpatient, outpatient, either), Birth Admission (in process, complete, either), and Nursery (Well Baby, NICU, Other). Below these are "Additional Search Criteria" buttons: Professional Contacts, Demographics, Patient Status (highlighted), Test Results, and Hearing Risks. A "Submit Search Criteria" button is at the bottom.

Step 4: Under Birth Screening Outcomes, select **Bilateral Referral** and **Unilateral Referral** (hold down the CTRL key to select both).

 A screenshot of the "Birth Screening Outcomes" list. The list items are: Pass Both, Pass Both - Monitoring Required, Unilateral Referral, Bilateral Referral, Not Required, Not Indicated, No Screen Outcome, Missed, Deceased, and Refused. "Unilateral Referral" and "Bilateral Referral" are selected. There are "clear all" and "select all" buttons at the bottom.

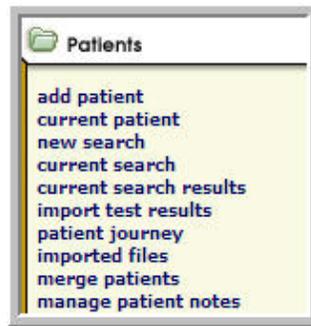
Step 5: Scroll down to the bottom and click on **Save**.

Step 6: Click **Submit Search Criteria**.

This will produce a list of babies that were born in the dates specified that did not pass the birth screen.

FINDING PATIENTS THAT MISSED THE BIRTH SCREEN

Step 1: Click **new search** on the Patients tab.



Step 2: Enter the dates of birth you are searching for (e.g. if you are searching for babies that were born in May but did not pass the birth screen, enter 05/01/2007 – 05/31/2007).

Step 3: Click **Complete** in the Birth Admission box.

Step 4: Click on **Patient Status**.

A screenshot of the 'Patient Search Criteria' form. It includes fields for Name, Medicaid No., Medical Record No., Date of Birth (set to 'born between: 05/01/2007 and 05/31/2007'), and Confidential ID. There are radio buttons for Patient Location (inpatient, outpatient, either) and Birth Admission (in process, complete, either). A 'Nursery' section has checkboxes for Well Baby, NICU, and Other. At the bottom, there are buttons for Professional Contacts, Demographics, Patient Status (highlighted), Test Results, and Hearing Risks, along with a 'Submit Search Criteria' button.

Step 4: In **Birth Screening Outcomes** box, highlight **Missed**.

Step 5: Scroll down and click **Save**.

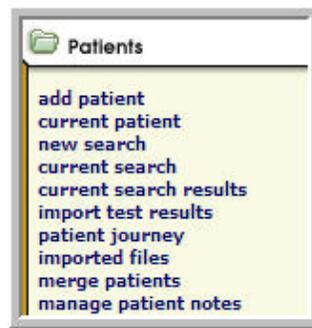
A screenshot of the 'Birth Screening Outcomes' list. The list includes: Pass Both, Pass Both - Monitoring Required, Unilateral Referral, Bilateral Referral, Not Required, Not Indicated, No Screen Outcome, Missed (highlighted in blue), Deceased, and Refused. There are 'clear all' and 'select all' buttons at the bottom.

Step 6: Click **Submit Search Criteria**.

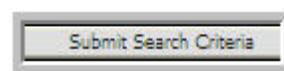
This will produce a list of babies that were born in the dates specified that missed the birth screen.

FINDING DUPLICATE RECORDS IN eSP™

Step 1: Click **new search** on the **Patients** tab.



Step 2: Type in dates of birth that you want to review (e.g. 6/1/2005 through 6/30/2005), and click **Submit Search Criteria**.

 A screenshot of the "Patient Search Criteria" form. It contains several input fields: "Name:" with a note "(Last name, First name)" and a sub-note "wildcard searches are permitted using the percent symbol (e.g. Smi%e)"; "Medicaid No.:"; "Medical Record No.:"; "Date of Birth:" with a "born between:" label and two date pickers; and "Confidential ID:".


Step 3: When the list of patients appears, scroll down and click **Export Results**.

Step 4: On the export page, choose some of the fields (i.e. Name, MRN, DOB, etc.) listed in the **Available Export Fields** box. Highlight the field, and click the top + sign to move it to the exported file list.

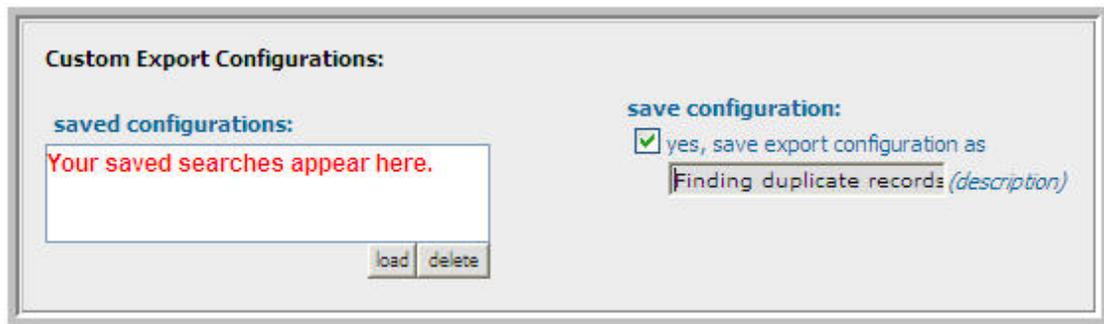
 A screenshot of the "Build Export Fields List" dialog. It has two main sections: "available export fields:" on the left and "fields to include in exported file:" on the right. The left section contains a list of fields including "Unique System Patient ID", "Currently Active Newborn Screen Facility ID", "Currently Active Newborn Screen Facility Name", "Patient's Last Name", "Patient's First Name", "Patient's Medicaid No", "Patient's Medical No", and "Patient's Gender". The right section contains "Patient's Last Name", "Patient's First Name", and "Patient's Medical No". There are "select all", "up", "down", "edit", and "remove all" buttons at the bottom.

Step 5: File type: choose Tab Delimited.

Step 6: Text to use for missing data: Type in the word **blank**.

 A screenshot of the "Additional Export Information" dialog. It contains three settings: "file type:" set to "Tab Delimited" in a dropdown menu; "text to use for missing data:" set to "blank" in a text input field; and "include header:" with a checked checkbox.

Step 7: If you would like to save this configuration for future searches, click **yes, save export configuration as** in the bottom box, and name the search something like “finding duplicate records.” For future searches, select your search under the Saved Configuration, load, and export.



The screenshot shows a dialog box titled "Custom Export Configurations:". It is divided into two main sections. On the left, under "saved configurations:", there is a text box containing the red text "Your saved searches appear here." Below this text box are two buttons labeled "load" and "delete". On the right, under "save configuration:", there is a checked checkbox followed by the text "yes, save export configuration as". Below this is a text input field containing the text "Finding duplicate records" followed by "(description)" in italics.

Step 8: Click **Export File**. When completed, click **Open**.

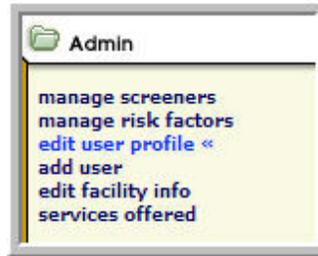
TIP

The notepad list that is generated can be copied and pasted into an Excel spreadsheet for easier viewing and sorting.

EDITING USER PREFERENCES

This allows a user to set their screening defaults, modify identifying information and password. Any user profile modifications must be made by the individual user while logged into eSPT™.

Step 1: Click on the **Admin** tab on the left side of the page.



Step 2: Click on **edit user profile**.

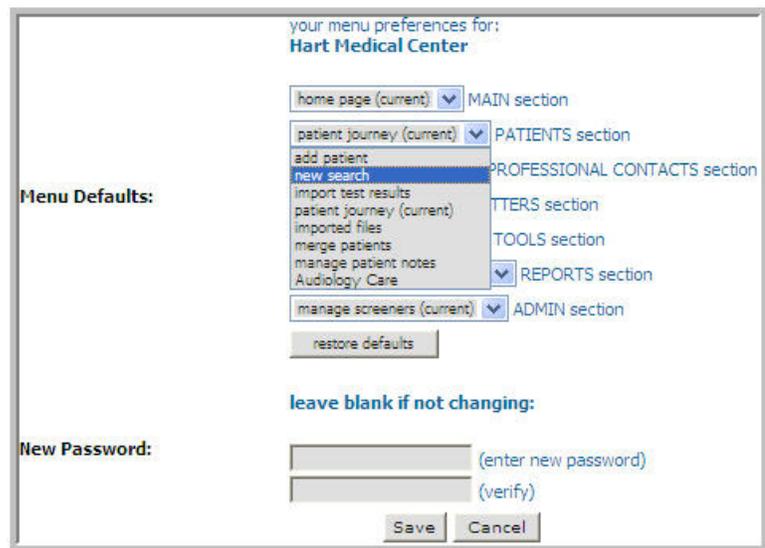
Step 3: Edit your address, phone number, and email, if necessary.

NOTE: THIS IS NOT THE SAME AS YOUR FACILITY INFORMATION. IF YOU NEED TO EDIT YOUR FACILITY'S (HOSPITAL, CLINIC, ECI PROGRAM) ADDRESS, PHONE NUMBER, OR EMAIL ADDRESS, CLICK ON "EDIT FACILITY INFO" UNDER THE ADMIN TAB.

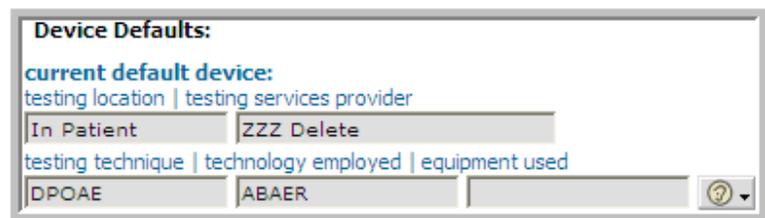
Step 4: Scroll down to **menu defaults**. This is where you can tell the system which menu option you want to see when you click on the menu tabs on the left side of the page.

Step 5: To be taken directly to the **New Search** page when you click on the Patients tab, change the default setting from *patient journey* to **New Search**.

Step 6: Click on **Save**.



TIP
 Edit your device defaults on your user profile to set your hearing exam preferences (testing location, etc.) by clicking the "ear" button



MANAGING RISK FACTORS

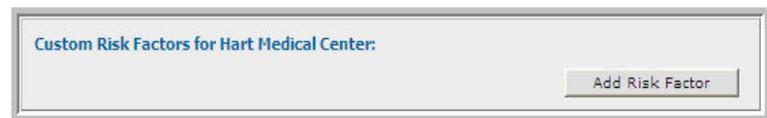
Some hospitals or providers may elect to monitor additional risk factors that are not included in the system defaults. The **Manage Risk Factors** section allows the professional to add their own local risks to use in monitoring. A local risk factor is one that can only be seen by the hospital/facility where it was added. These risks may also be removed at any time.

Step 1: At Main Menu, click **Admin** tab.

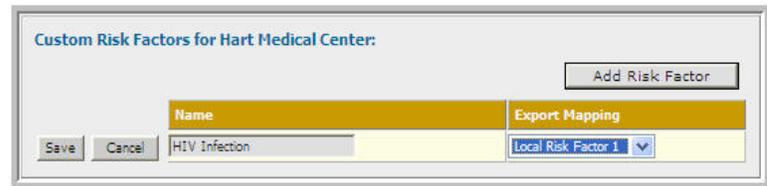
Step 2: Click **Manage Risk Factors** option.



Step 3: Click the **Add Risk Factor** button.



Step 4: Type in a name for the new risk factor in the text box provided.



Step 5: In the **Export Mapping** drop down, select the order in which the risk factor should be exported.

Step 6: Click the **Save** button.

APPENDIX A: OZ SYSTEMS – eSCREENER PLUS™ HIPAA COMPLIANCE

At Optimization Zorn Corporation, we are committed to implementing appropriate policies, procedures and information systems, not only to prepare OZ Systems and its customers to meet the regulatory mandates of the Health Insurance Portability and Accountability Act of 1996 (HIPAA), but also to preserve and enhance our core services. OZ Systems has been proactive and has sought to exceed HIPAA compliance in all areas of its business, from services to software. eSP™ is a 100% HIPAA compliant system; it adheres to all relevant guidelines and legislation as required by HIPAA.

Our products have been developed “from the ground up” by our in-house, industry experienced development team specifically for the purpose of allowing our customers to adhere to HIPAA compliance rules NOW and easily remain in compliance in the future. OZ Systems will continue to monitor regulatory requirements and the marketplace to implement product enhancements as needed. We will communicate the availability of all software updates to our customers in their ongoing HIPAA compliance efforts. In other words, we are providing a long-term, cost-effective solution rather than a “quick fix” for meeting the initial compliance deadlines.

OZ Systems products support the encryption and masking of personally identifiable health-related information to facilitate compliance with data security and privacy regulations and rulings under the Health Insurance Portability and Accountability Act (HIPAA), as well as corporate policies and guidelines with regard to security and confidentiality of electronic records and European privacy directives.

Although we realize that it takes more than just installing some software to be fully HIPAA compliant, providers need vendors who are backing their products if they are ever going to be compliant themselves. OZ Systems conducts extensive testing, and if you do find any deficiencies in our products then tell us about it and we'll start fixing it the very same day.

If you have further question regarding the HIPAA compliance of any OZ Systems products or solutions, please feel free to email Dwight Schrock Director of IT and Security at dschrock@oz-systems.com.

APPENDIX B: HEARING SCREENING TECHNOLOGIES REFERENCE

Technology	DP	SABR	TOAE	File Path where Technology saves Data	Import file Name	Software Name	What happens after collected in OZ without deletion of file
Bio-Logic Systems Corp							
ABAER		X		A:\Unhs.oz (can be configured to different drive)	A drive=unhs.oz -- SIMS direct=abaer.oz		Once saved in UNHS export file needs to be removed from location in order to continue testing.
AuDx	X		X	c:\Progra~1\Bio- lo~1\AuDxda~1\datalink.oz c:\progra~1\audxda~1\transfer \datalink.oz	datalink.oz	datalink software	Once saved in Datalink export file needs to be removed from location in order to continue testing.
Navigator Pro	X	X	X	A:\Unhs.oz (can be configured to different drive)	unhs.oz		
Scout Sport			X	c:\progra~1\scout\scout.ozz	scout.ozz		
Grason Stadler-Viasys							
GSI 70	X			C:\Program Files\GSI70DMS\OZEXPORT.dat	ozexport.oz	GSI70DMS	
GSI AUDIOscreen	X	X		C:\Program Files\AudioTrac\everesta.dat C:\Program Files\AudioTrac\everestd.dat	SABR-everesta.dat DPOAE-everestd.dat	AudioTrac	
IHS - Intelligent Hearing Systems							
Smart Screener		X			1 site that doesn't use SIMS anymore		
Smart OAE	X						
Madsen							
AccuScreen	X	X	X	C:\Program Files\Madsen\Acculink\tooz.dat	tooz.dat	acculink software	
Capella	X		X		captotoz.bin	direct launch in SIMS	
Echo-Screen			X	C:\echoscrn\ozexport.dat	ozexport.dat		

Technology	DP	SABR	TOAE	File Path where Technology saves Data	Import file Name	Software Name	What happens after collected in OZ without deletion of file
Maico Diagnostics							
EROScan	X		X		ozexport.dat		
Natus Medical							
ALGO 2		X		A:*.txt	*.txt - 2e standard format	Datadrop	File exported to floppy - next export needs to be renamed or the old file must be deleted.
ALGO 2e		X		A:*.txt	*.txt - 2e standard format	Datadrop	File exported to floppy - next export needs to be renamed or the old file must be deleted.
ALGO 2e color		X		A:*.txt	*.txt - 2e standard format	Datadrop	File exported to floppy - next export needs to be renamed or the old file must be deleted.
ALGO 3		X		A:*.txt	*.txt - 2e standard format	Datadrop	File exported to floppy - next export needs to be renamed or the old file must be deleted.
ALGO 3i		X		A:*.txt	*.txt - 2e standard format	Datadrop	File exported to floppy - next export needs to be renamed or the old file must be deleted.
Otodynamics							
DP Echoport Plus	X		X	C:\PROGRA~1\Otodyn~1\LOPIu~1\DtaFiles\OZDATA.BIN	ozdata.bin	Plus Utilities or EZ Screen	Exported file continues to append even after it has imported into eSP/SIMS if not deleted
Echoport Plus			X	C:\PROGRA~1\Otodyn~1\LOPIu~1\DtaFiles\OZDATA.BIN	ozdata.bin	Plus Utilities or EZ Screen	Exported file continues to append even after it has imported into eSP/SIMS if not deleted
Echocheck			X		ozdata.bin	Echocheck or EZ Screen	Exported file continues to append even after it has imported into eSP/SIMS if not deleted
Echoport ILO288-USB I			X	C:\Progra~1\Otodyn~1\LO4WIN\Transfer\OZDATA.BIN C:\Progra~1\Otodyn~1\LO4WIN\Transfer\OZ\Ozdata.bin	ozdata.bin	EZ Screen	Exported file continues to append even after it has imported into eSP/SIMS if not deleted

Technology	DP	SABR	TOAE	File Path where Technology saves Data	Import file Name	Software Name	What happens after collected in OZ without deletion of file
Echoport ILO288 - USB II	X		X	C:\Progra~1\Otodyn~1\ILO4WI N\Transfer\OZDATA.BIN C:\Progra~1\Otodyn~1\ILO4WI N\Transfer\OZ\Ozdata.bin	ozdata.bin	EZ Screen	Exported file continues to append even after it has imported into eSP/SIMS if not deleted
Echoport ILO288 - LPT			X	C:\Progra~1\Otodyn~1\ILO4WI N\Transfer\OZDATA.BIN C:\Progra~1\Otodyn~1\ILO4WI N\Transfer\OZ\Ozdata.bin	ozdata.bin	EZ Screen	Exported file continues to append even after it has imported into eSP/SIMS if not deleted
Echoport ILO292 - USB I	X		X	C:\Progra~1\Otodyn~1\ILO4WI N\Transfer\OZDATA.BIN C:\Progra~1\Otodyn~1\ILO4WI N\Transfer\OZ\Ozdata.bin	ozdata.bin	EZ Screen	Exported file continues to append even after it has imported into eSP/SIMS if not deleted
Echoport ILO292 - USB II	X		X	C:\Progra~1\Otodyn~1\ILO4WI N\Transfer\OZDATA.BIN C:\Progra~1\Otodyn~1\ILO4WI N\Transfer\OZ\Ozdata.bin	ozdata.bin	EZ Screen	Exported file continues to append even after it has imported into eSP/SIMS if not deleted
ILO88 Dpi	X		X		v5.6 SIMS reads - v6.0 EZ Screen	eSP does not work with version 5.6	Software Version 5.6 and below not compatible with eSP
Sonamed							
Clarity ABR		X		C:\CLARITY\DATA\EXpLocOZ\Ozclar.OZ	ozclar.oz	Clarity Sonamed/SonNet	Exported file continues to append even after it has imported into eSP/SIMS if not deleted
Clarity DP	X			C:\CLARITY\DATA\EXpLocOZ\Ozclar.OZ	ozclar.oz	Clarity Sonamed/SonNet	Exported file continues to append even after it has imported into eSP/SIMS if not deleted
Clarity Handheld	X				ozclar.oz	SonNet Management Program	Exported file continues to append even after it has imported into eSP/SIMS if not deleted
Starkey Lab							
DP2000	X			C:\dpoae2000.data\oz.txt	oz.txt	DP2000	Exported file continues to append even after it has imported into eSP/SIMS if not deleted