Add Document Type
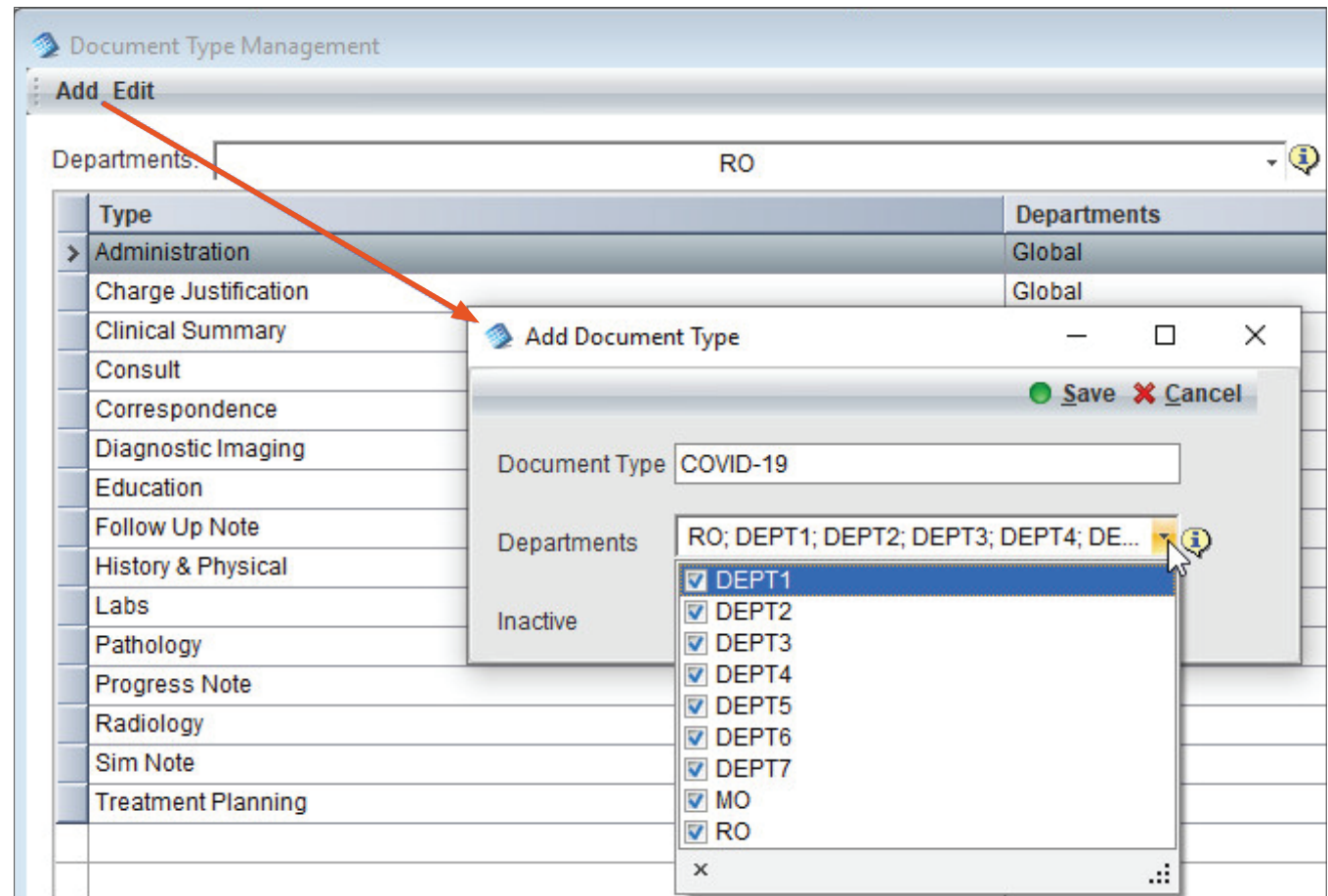
Track related Documents

1) Click **File > Libraries > Document Types**
2) Click **Add**
3) Add the Document Type and assign to Departments

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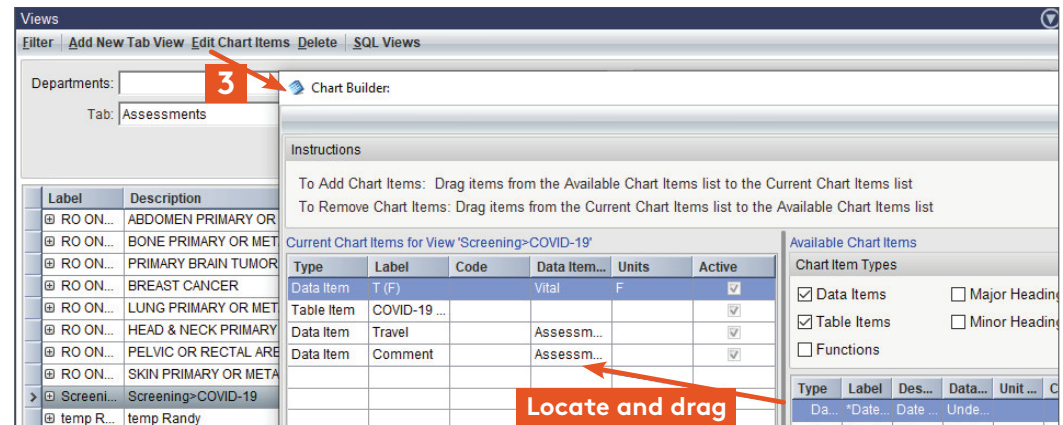
LLFMSQ200413a_v3.0

Add a Screening Assessment

Create a COVID-19 screening assessment

1) Click **File > System Utilities > Observation Definitions**

2) In **View panel**, click **Add New Tab View**
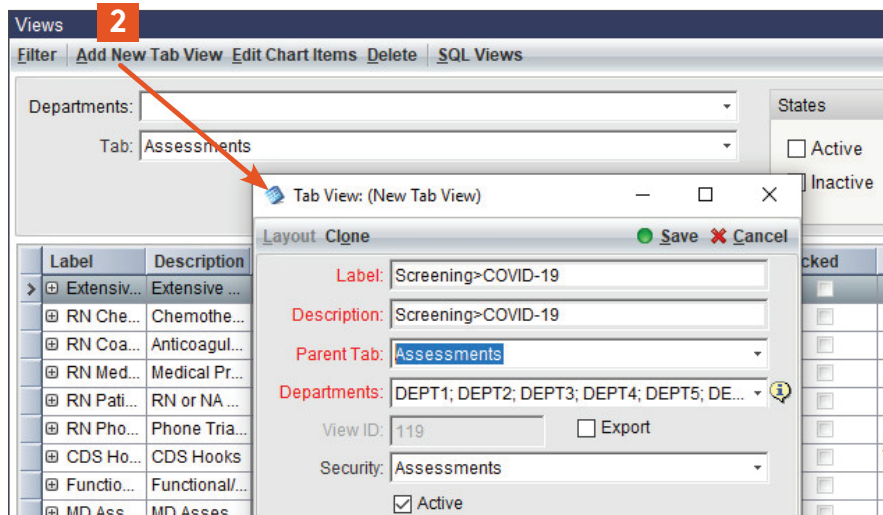
3) Highlight new Assessment row, click **Edit Chart Items**, find and drag available items from right panel to current items panel on left

Add Assessment Table Item

Create a COVID-19 related assessment question, e.g., screening or telemedicine documentation

1) Click **File > System Utilities > Observation Definitions**
2) In **Observations Definition Items** widget, create a new question:
   select **Add > Table Item**
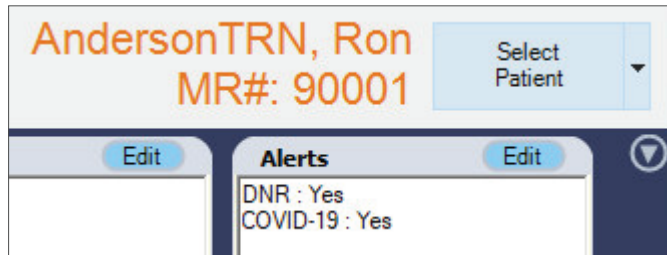3) Create responses: select **Add > Table Item Choices**
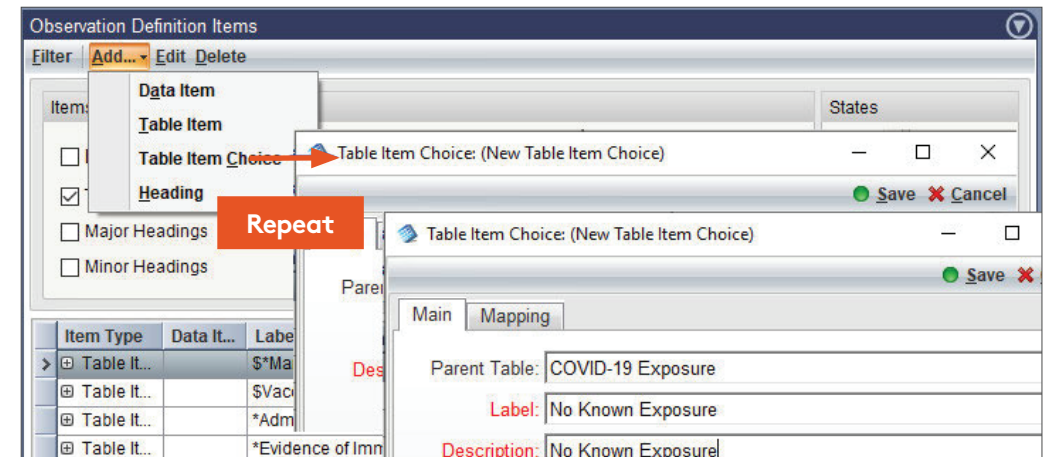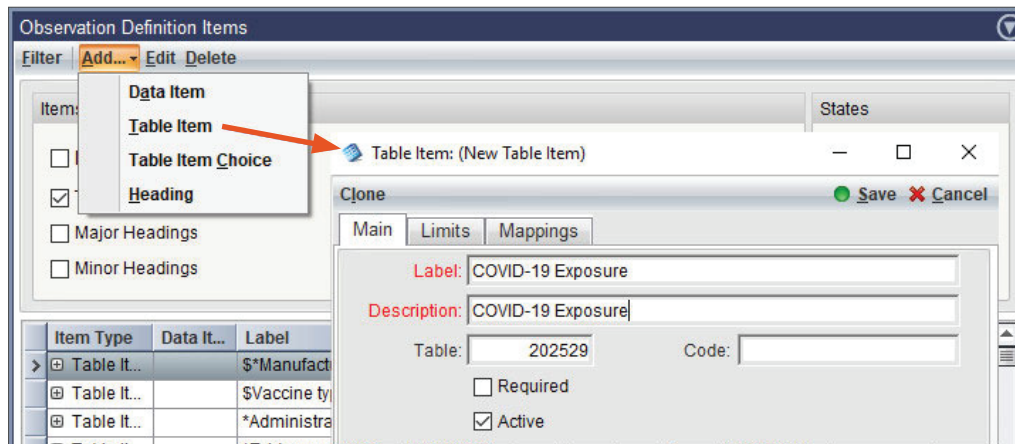
Capture codes for Telemedicine activity

1) Click **File > Libraries > Quality Check List Tasks**
2) Add. Identify billing code(s)

Display COVID-19 status
on patient chart

1) Configure

a. **File > System Utilities > Observation Definitions > Chart Views and Items**

b. Click **Table Items, select Table: Alert types.**

c. **Add Table Item Choice**
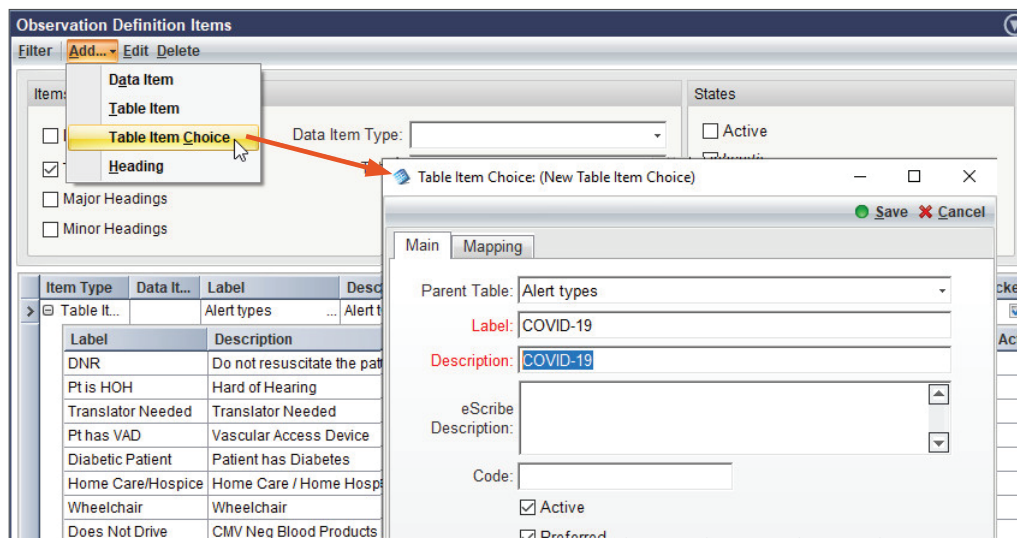
2) Assign to Patient

a. Click **eCHART > Allergies and Alerts**

b. **Add** alert
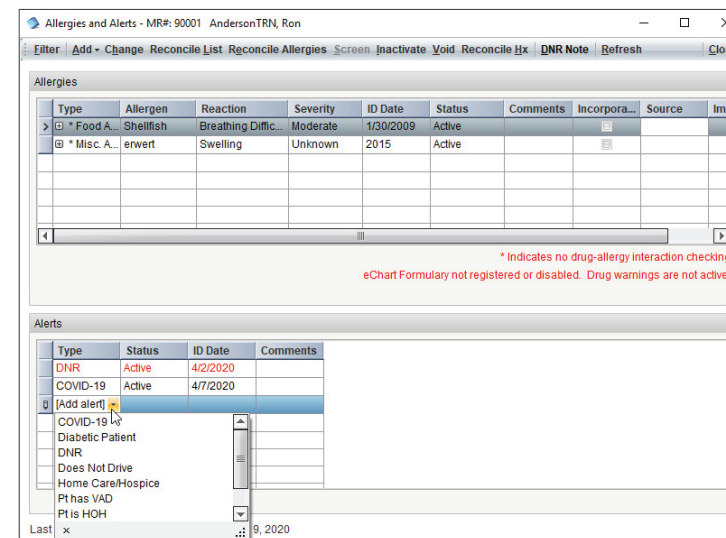
Add Dedicated Chart Page

Create a dedicated Chart Tab

1) Right mouse click on any tab, **click Add Tab**
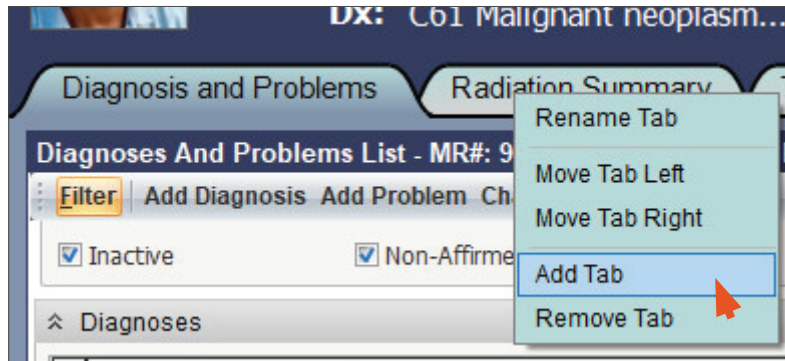
2) Type tab label
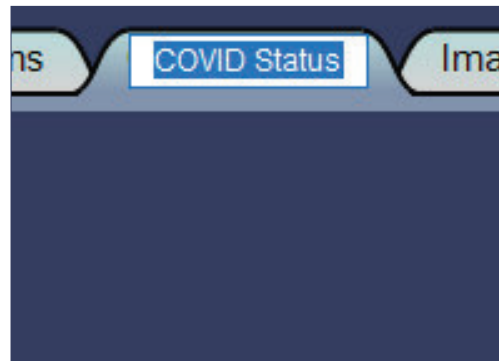
3) Add relevant content, e.g., merge field widget with Screening Assessment
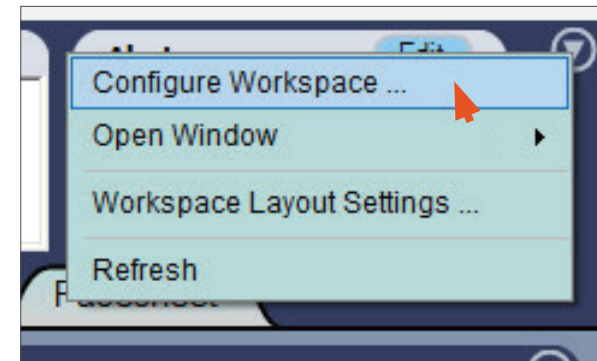
Clinical Trials

Alert clinic and monitor positive patients using Clinical Trials

1) Select **Tools > Clinical Trials > Trial**
2) Add **Trial ID**
3) Assign to Patient. Select **Tools > Clinical Trials > Patient**
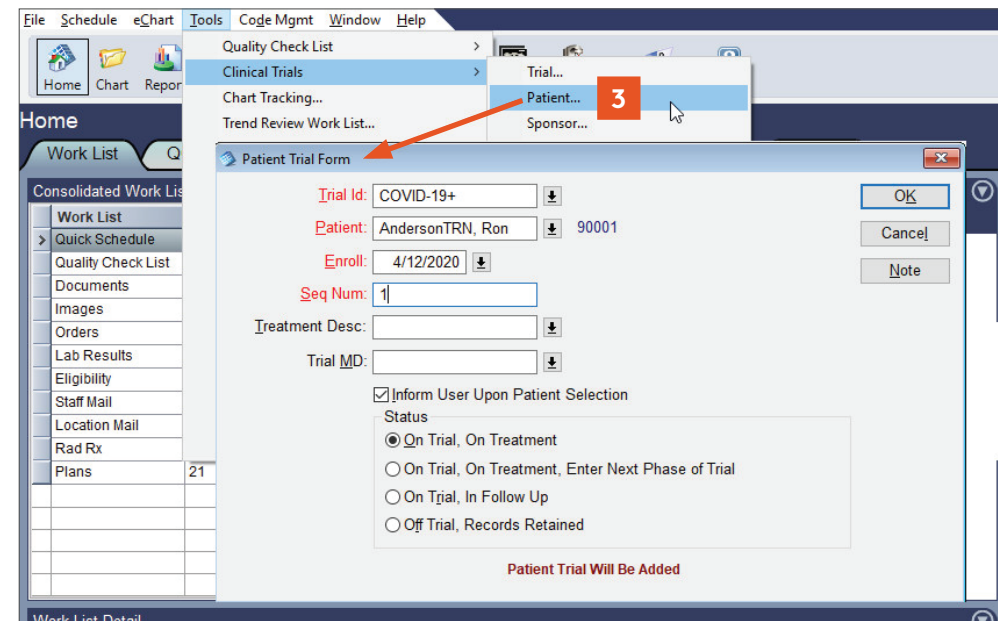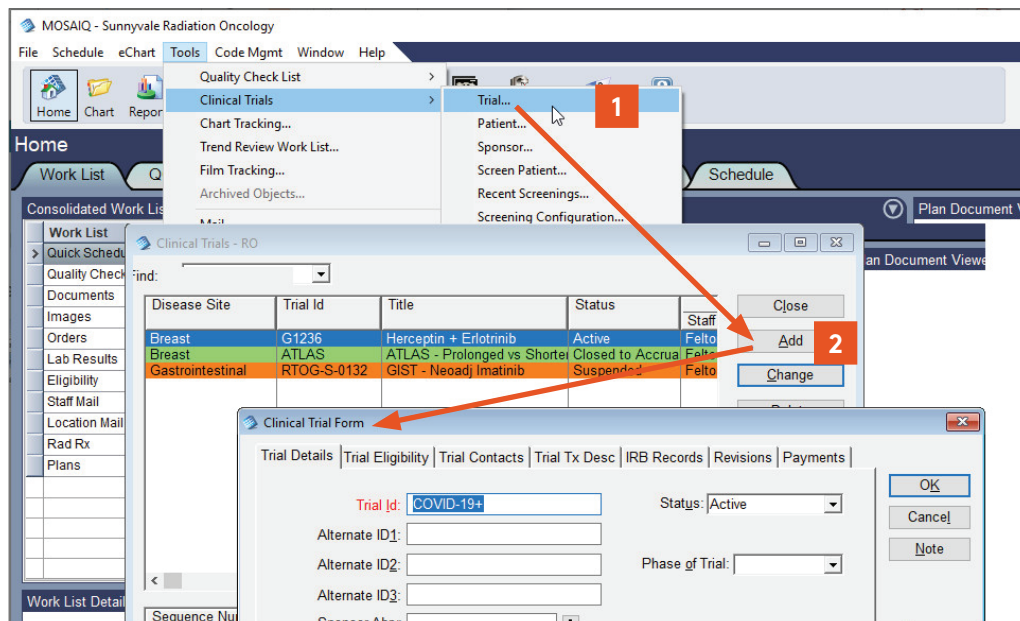
Please note: Sites must have the MOSAIQ® Clinical Trial option in order to utilize this functionality.

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Elekta

Add COVID-19 ICD code to problems list and assign to a patient

1) Configure

a. Click **File > Libraries > Diagnosis Codes. Add:**

b. Click **File > Libraries > Common Problem Codes.**

2) Assign to Patient: click **eCHART > Patient Problems. Add.**

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LLFMSQ200413h_v3.0
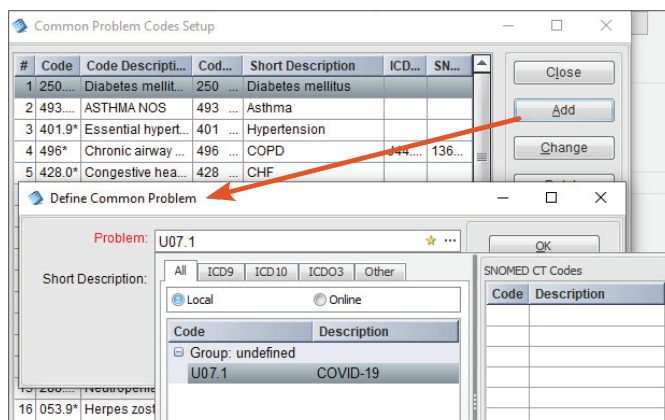
Merge Field Widget

View and add screening from Chart Viewer

1) From desired **Chart Tab,** select **Configure Workspace**
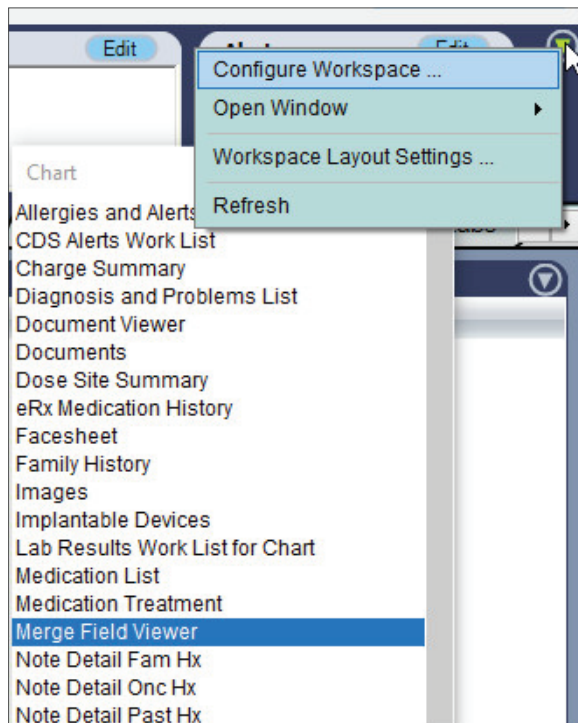
2) Drag **Merge Field Viewer** to workspace

3) Select **Merge Field > Assessments > Configure**
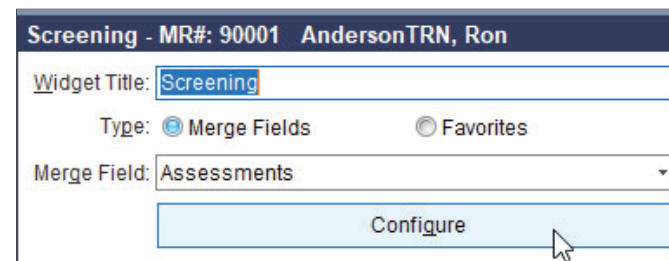
4) Highlight **Selected Items**, select desired **Assessment**
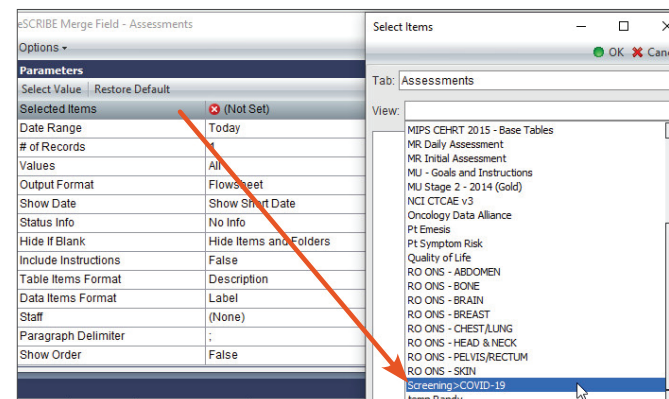
5) Select **Add** to enter screening information to patient chart
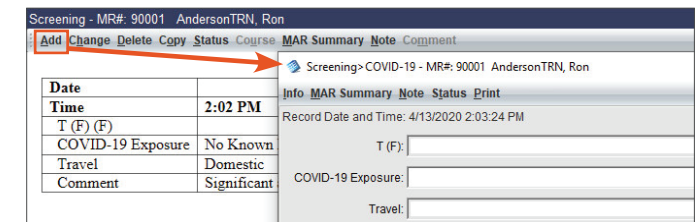
Chart Merge Field Widget

Consolidate assessment history and add new details directly from Chart Viewer

Configure Merge Favorite Template

1) Go to **echart > Documents**, right mouse click, open **eSCRIBE Templates > Add Template** (or edit an existing)

2) Format the page as you wish to view on widget, including any **Merge Fields**

3) Highlight content, right mouse click select **Merge Fields > Add to Favorites**

4) Name and select **Widget Layout**
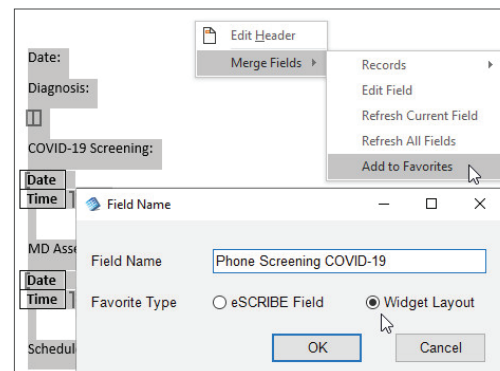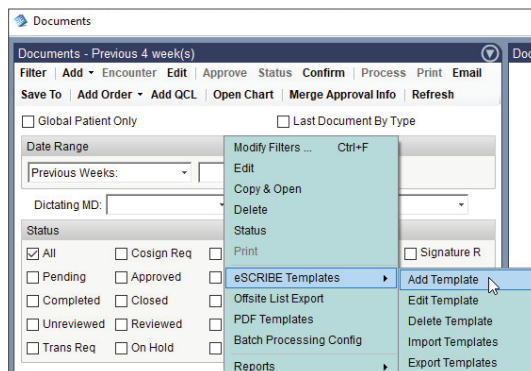
Assign widget to Chart Viewer

5) From desired **Chart Tab**, select **Configure Workspace**

6) Drag **Merge Field Viewer** to workspace

7) Select **Merge Fields > Favorites**, select **Favorite** from drop down list

8) Select **Configure**

9) Form populates, **Add** progressive Assessments as appropriate
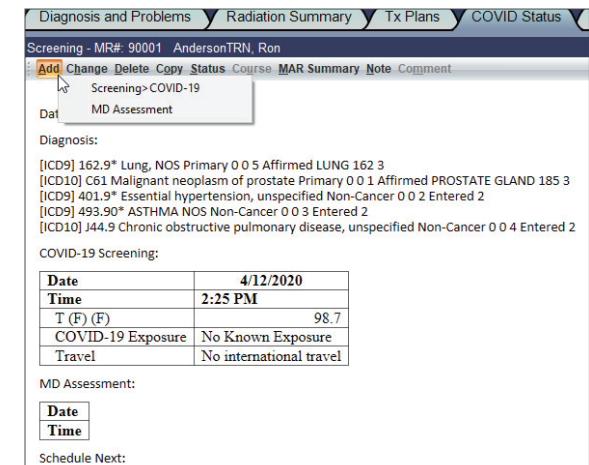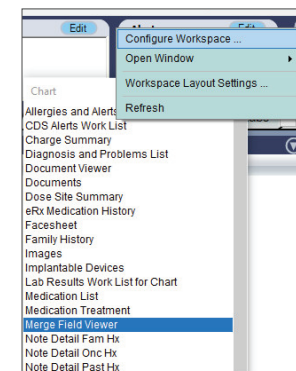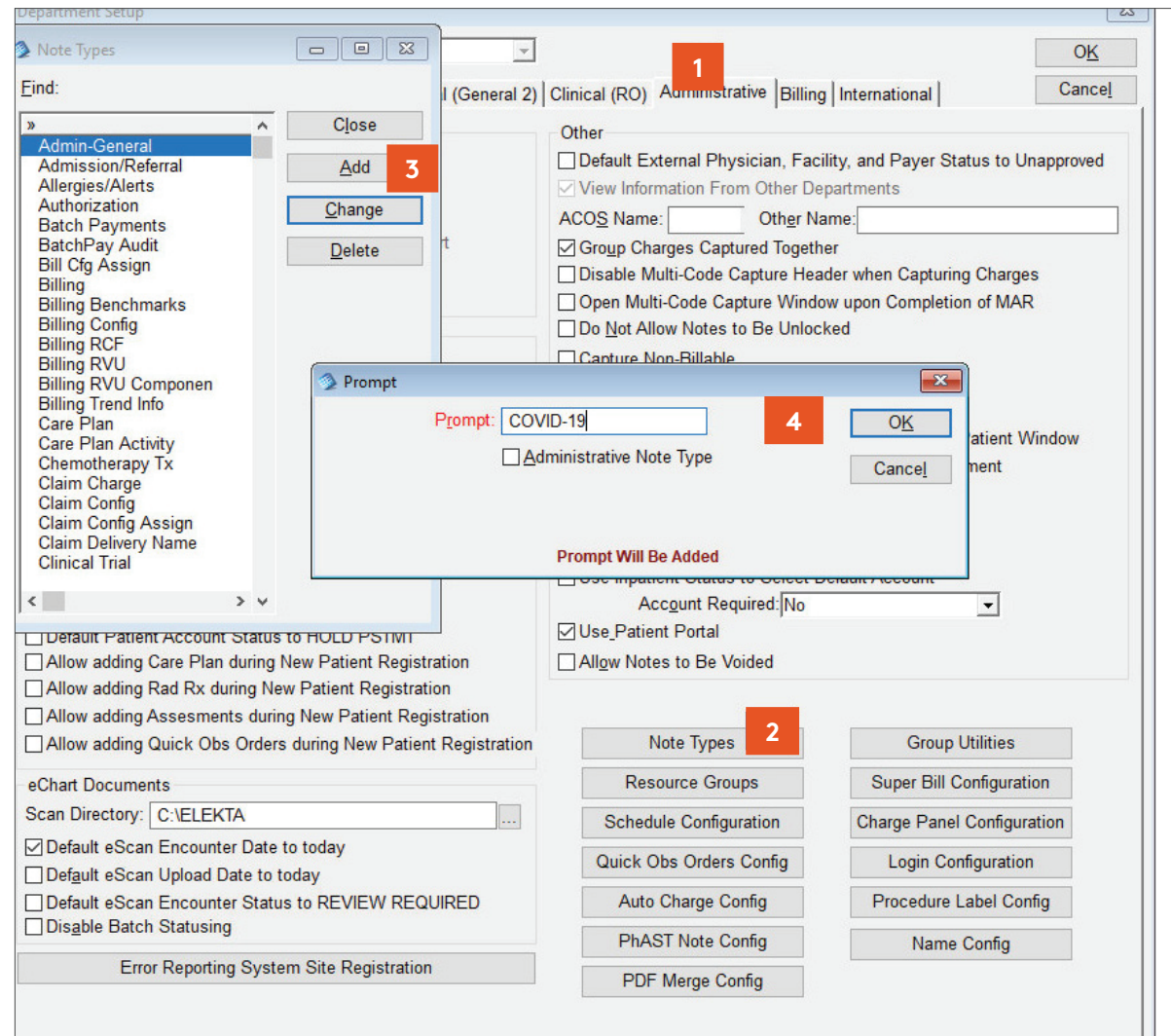
Add Note Type

Add a dedicated Note type

Click **File > System Utilities > Department Setup**

1) Click the **Administrative** tab
2) Click **Note Types**
3) **Add**
4) Name Note type in **Prompt** box
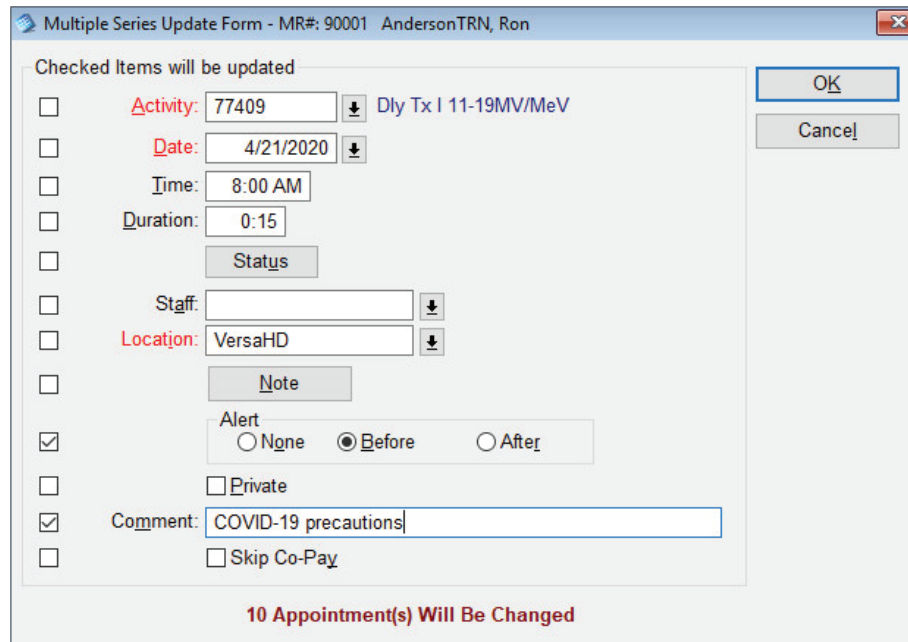
Add Schedule Alert

Add an alert notifying those opening the patient chart from the schedule

1) Assign to Patient

a. Select appointment or appointment series
b. Tag any/all appointments
c. Select **Change**
d. Select **Alert** type and checkbox
e. Select **Comment** checkbox and enter text

Multiple Series Update Form - MR#: 90001   AndersonTRN, Ron

Checked Items will be updated

☐ Activity: 77409 ⬇ Dly Tx I 11-19MV/MeV
☐ Date: 4/21/2020 ⬇
☐ Time: 8:00 AM
☐ Duration: 0:15
☐ Status
☐ Staff: ⬇
☐ Location: VersaHD ⬇
☐ Note

Alert
☑ ○ None ◉ Before ○ After
☐ ☐ Private
☑ Comment: COVID-19 precautions
☐ ☐ Skip Co-Pay

OK
Cancel

10 Appointment(s) Will Be Changed

Add Schedule Status

Elekta

Add a custom status to the Schedule to inform staff, track appointments

1) Configure

a. Click **File > System Utilities > Schedule Status Configuration**

b. Click **Add** from the Browse Schedule Statuses box

c. Select "Prompt user on Re-schedule and Delete" to provide a warning to users making these changes

2) Assign to Patient
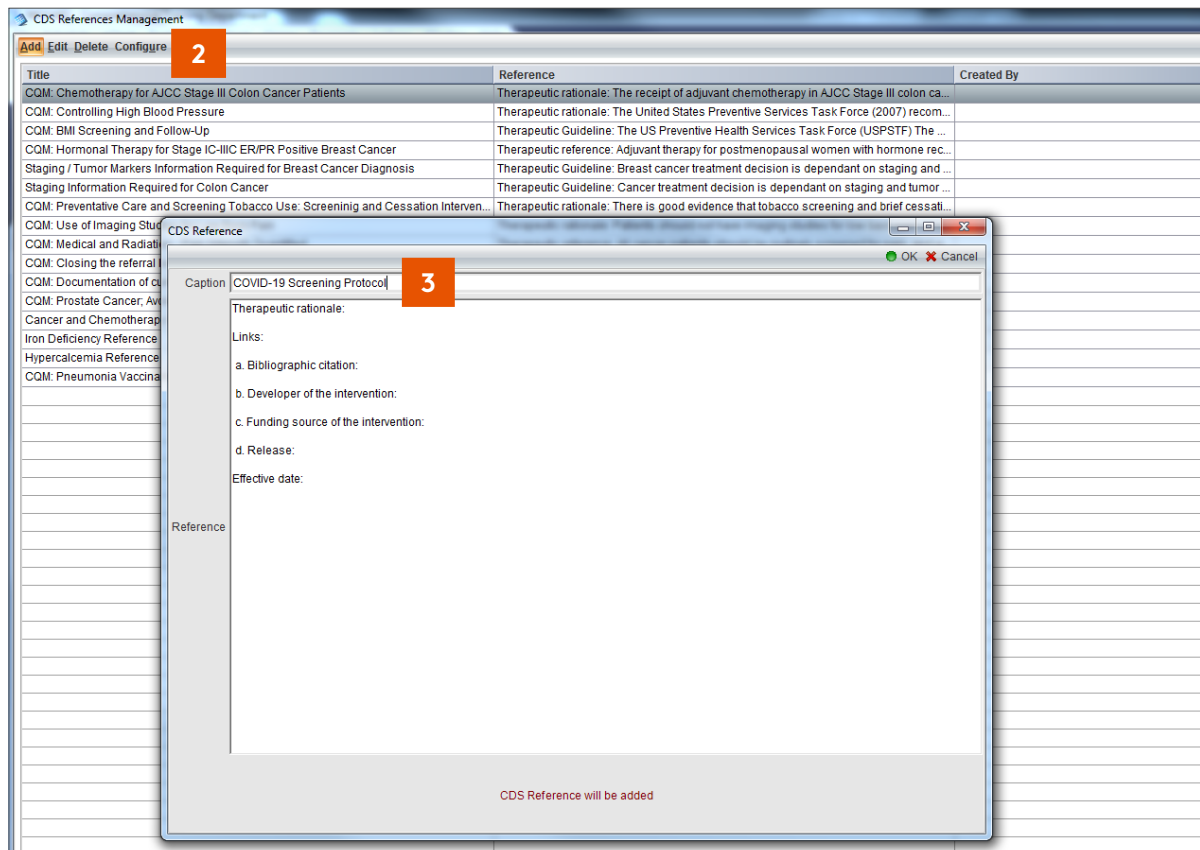
a. Select appointment or appointment series

b. Tag any/all appointments

c. Select **Status**

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Create Clinical Decision Support Reference

Create Clinical Decision Support (CDS) reference to be presented when a CDS Alert is generated

1) Click **File > Libraries > CDS Reference**

2) Click **Add**

3) Enter **Caption**

4) Optionally, enter instructions and bibliographic reference with or without URL links.

5) Click **OK** to save

MOSAIQ IQ Script:
Create Assessment by Appointment Activity

Elekta

Create and assign preference to present a COVID-19 assessment when an appointment is scheduled, ended and/or queued

1) Click **File > System Utilities > IQ Engine Configuration**

2) Click **Scripts > Operations and Events > General Charting > Appointment Script**

3) Click **Create Assessment by Appointment Activity**

4) Under preferences, click **New**

5) Select **Assessment/Tab View**
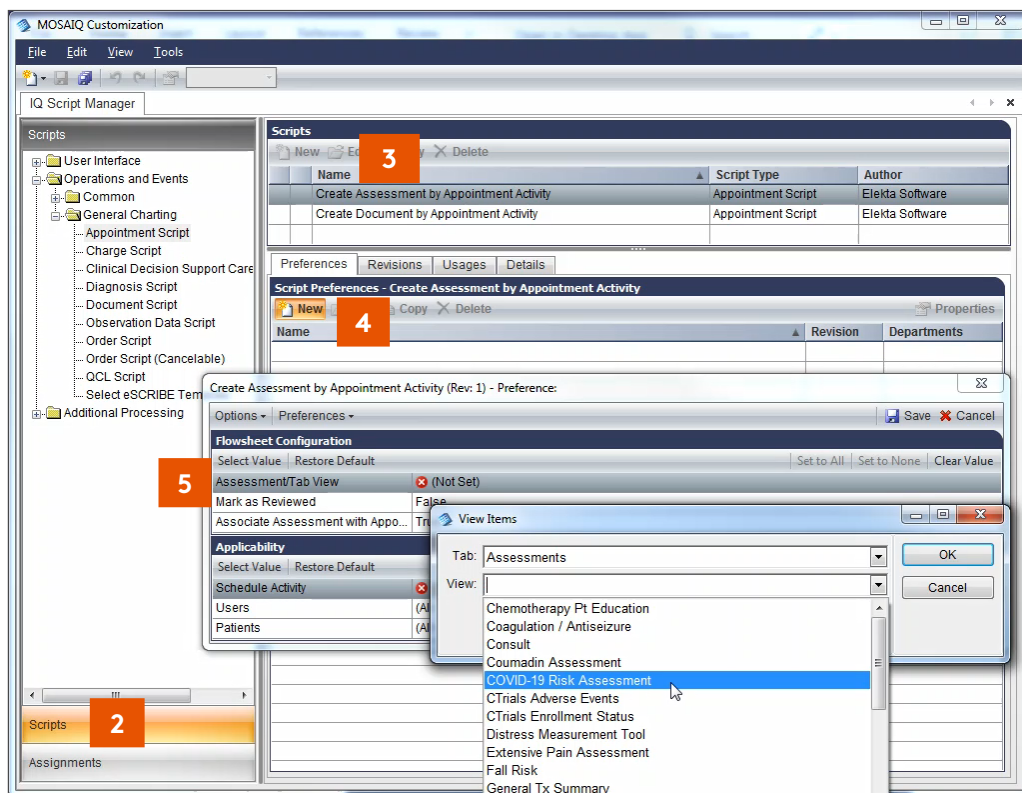
6) Optionally, set **Mark as Reviewed** to true and/or **Associate Assessment with appointment** to False

7) Select one or more **Schedule Activities**

8) Optionally, set **Users** or **Patients** (for testing purposes only)

9) Name preference, select all relevant departments and click **OK** to save
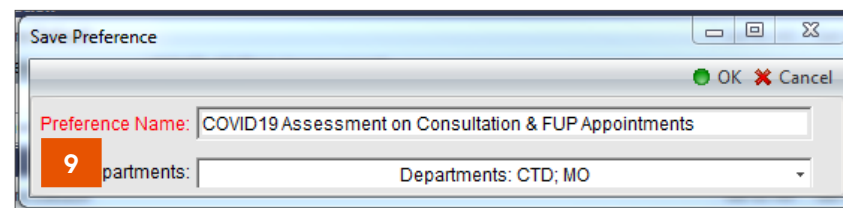
Create and assign preference to present a COVID-19 assessment when an appointment is scheduled, ended and/or queued

10) Click **Assignments > Operations and Events > General Charting > Appointment Script > Appointments**

11) Click one of **Appointment Ended, Appointment Scheduled** or **Patient Queued**

12) Under Script Assignments, click **New**

13) Select **Create Assessment by Appointment Activity** script
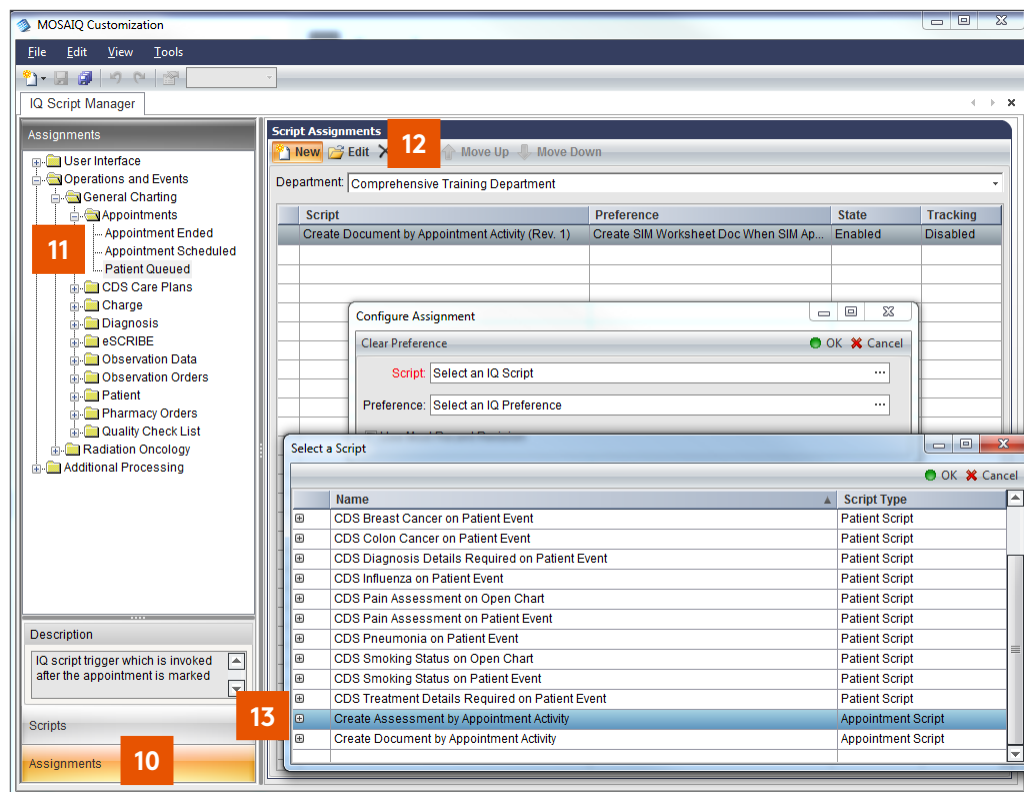
14) Select **Preference**

15. Click **OK** to save configuration assignment

16. Remember to repeat for all relevant departments

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LLFMSQ200522b
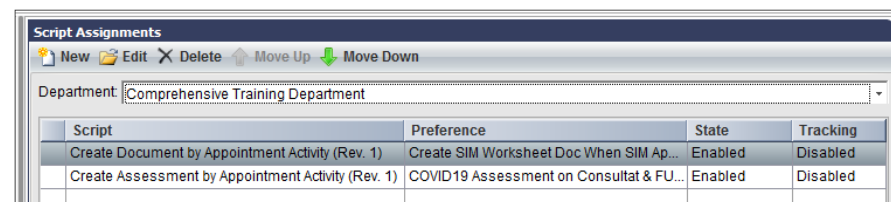
MOSAIQ IQ Script: Create Assessment by Procedure

Create and assign preference to present a COVID-19 assessment when an observation order (procedure) is being approved or generated approved through Quick RX

1) Click **File > System Utilities > IQ Engine Configuration**
2) Click **Scripts > Operations and Events > General Charting > Order Script**
3) Click **Create Assessment by Procedure**
4) Under preferences, click **New**
5) Select **Assessment/Tab View**

6) Optionally, set **Mark as Reviewed** to true and **Associate Assessment with Order** to false
7) Optionally select one or more **Care Plans**
8) Optionally set **Include Ad-Hoc Orders** to false
9) Select one or more **Procedures**
10) If selecting more than one procedure, optional update **Display Assessment Condition** to **Order contains any flagged procedure**
11) Optionally, set **Users** or **Patients** (for testing purposes only)

12) Name preference, select all relevant departments and click **OK** to save

Create and assign preference to present a COVID-19 assessment when an observation order (procedure) is being approved or generated approved through Quick RX

13) Click **Assignments > Operations and Events > General Charting > Observation Orders**

14) Click **Order Approved**

15) Under Script Assignments, click **New**

16) Select **Create Assessment by Procedure** script
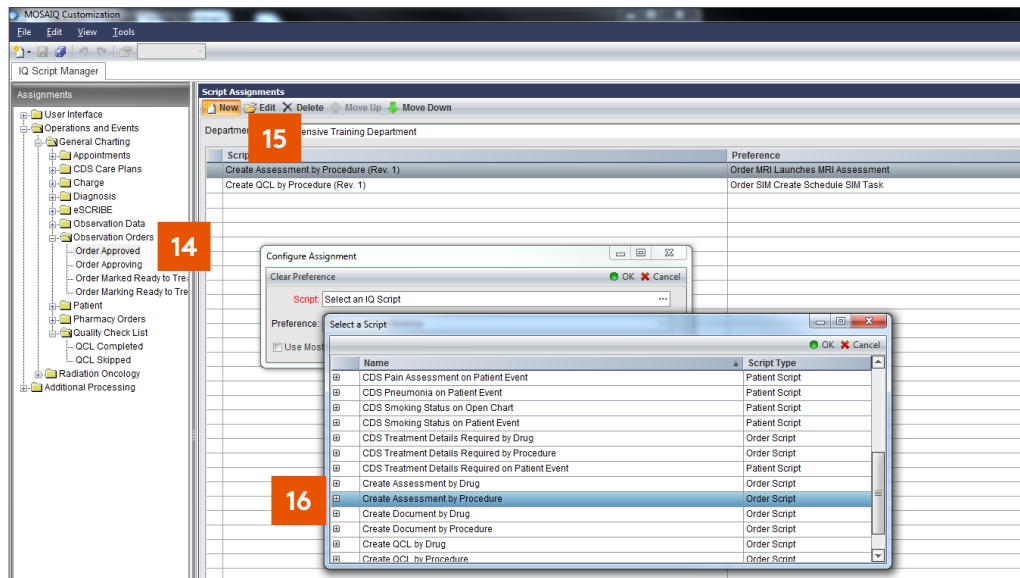
17) Select **Preference**
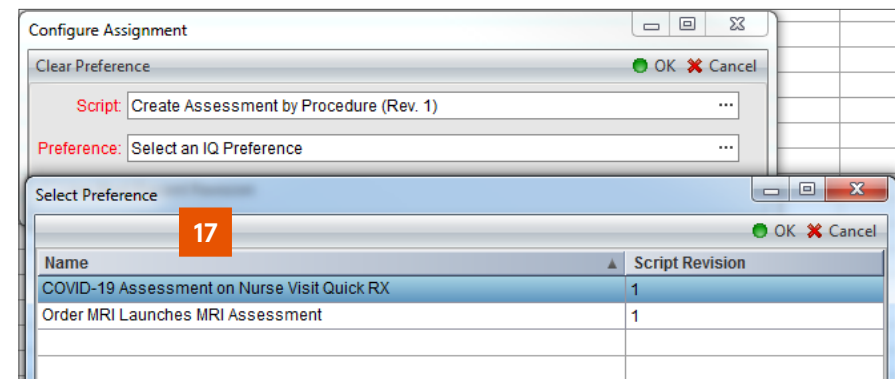
18) Click **OK** to save configuration assignment

19) Remember to repeat for all relevant departments
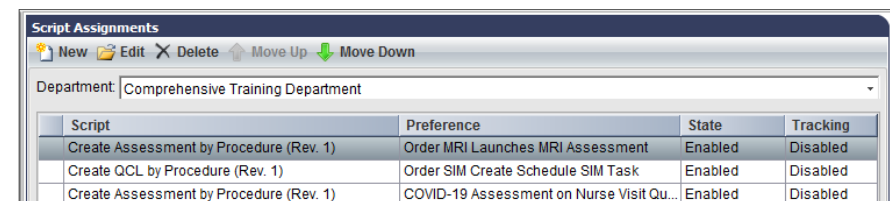
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MOSAIQ IQ Script:
Create Assessment by QCL Task

Elekta

Create and assign preference to present a COVID-19 assessment when a QCL Task is completed or skipped

1) Click **File > System Utilities > IQ Engine Configuration**
2) Click **Scripts > Operations and Events > General Charting > QCL Script**
3) Click **Create Assessment by QCL Task**
4) Under preferences, click **New**
5) Select **Assessment/Tab View**
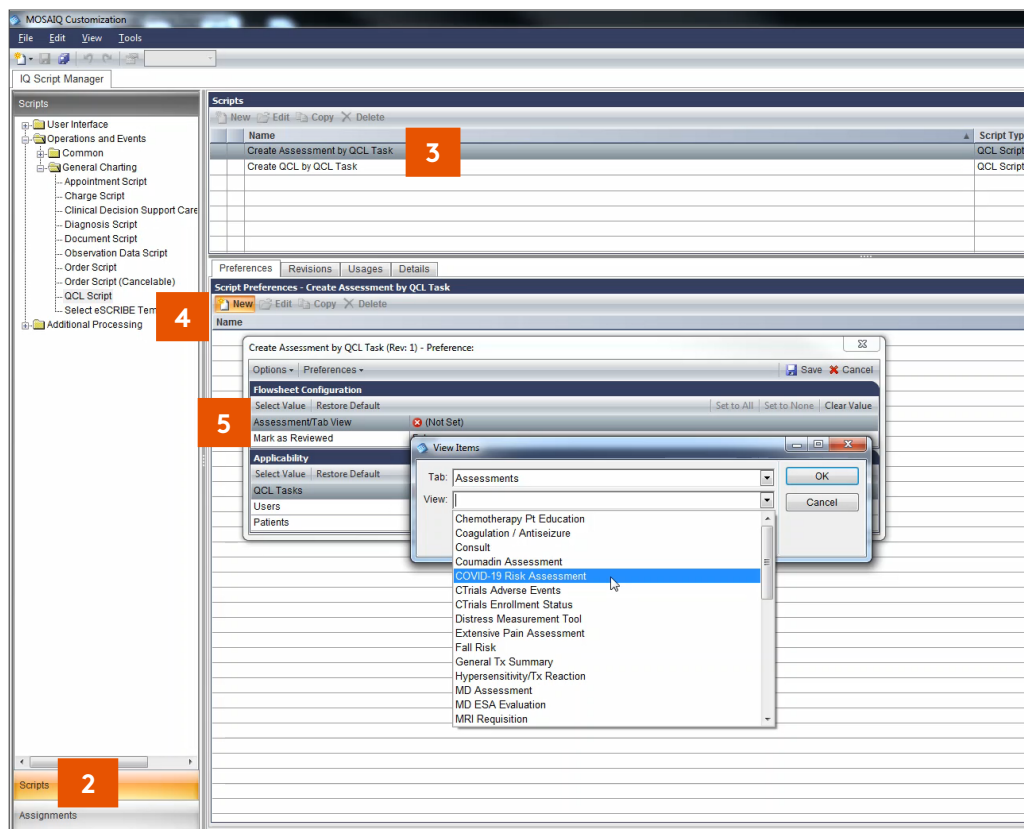
6) Optionally, set **Mark as Reviewed** to true
7) Select one or more **QCL Tasks**
8) Optionally, set **Users** or **Patients** (for testing purposes only)

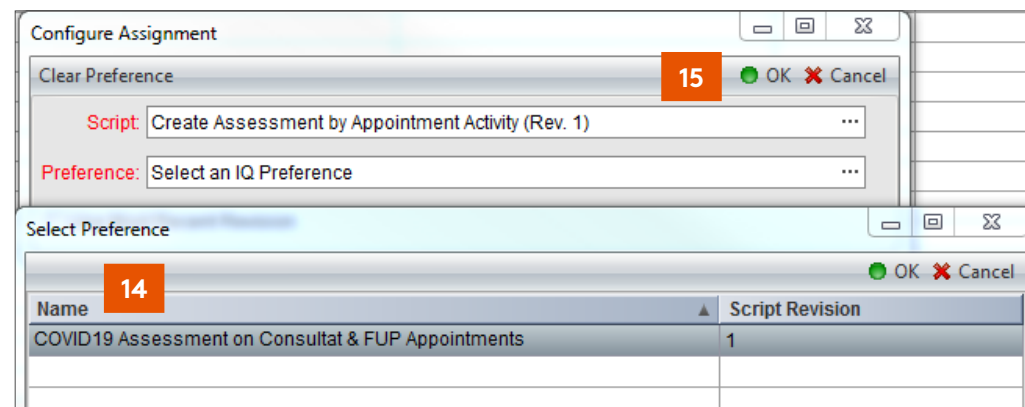9) Name preference, select all relevant departments and click **OK** to save

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MOSAIQ IQ Script:
Create Assessment by QCL Task continued

Elekta

Create and assign preference to present a COVID-19 assessment when a QCL Task is completed or skipped

10) Click **Assignments > Operations and Events > General Charting > Quality Check List**

11) Click one of **QCL Completed** or **QCL Skipped** (most commonly completed)

12) Under Script Assignments, click **New**

13) Select **Create Assessment by by QCL Task** script
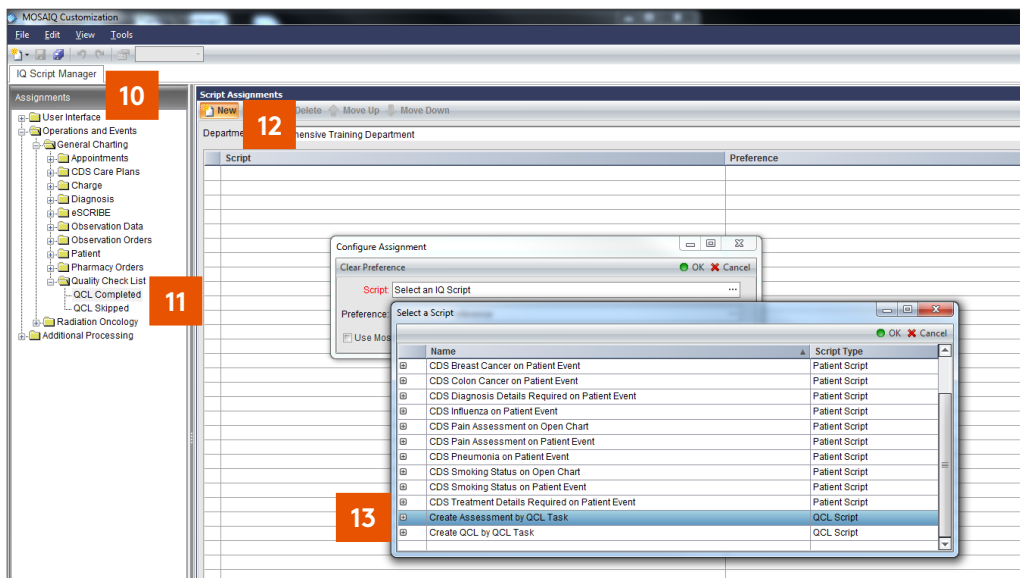
14) Select **Preference**
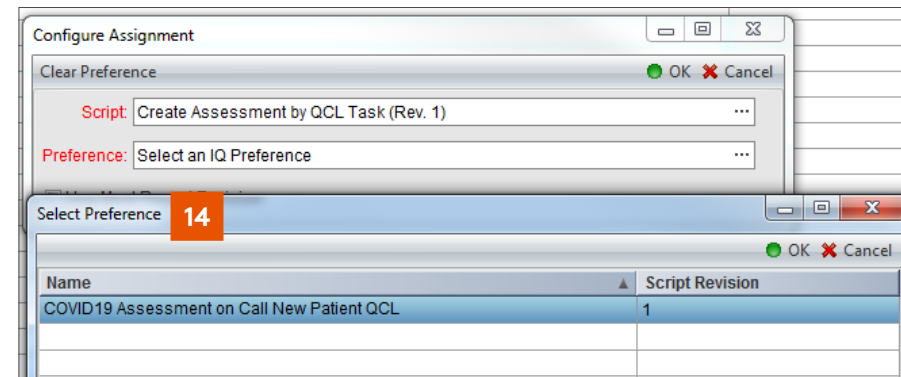
15) Click **OK** to save configuration assignment

16) Remember to repeat for all relevant departments
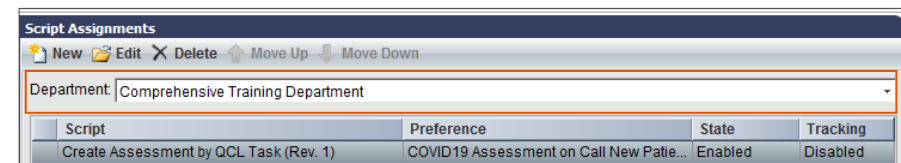
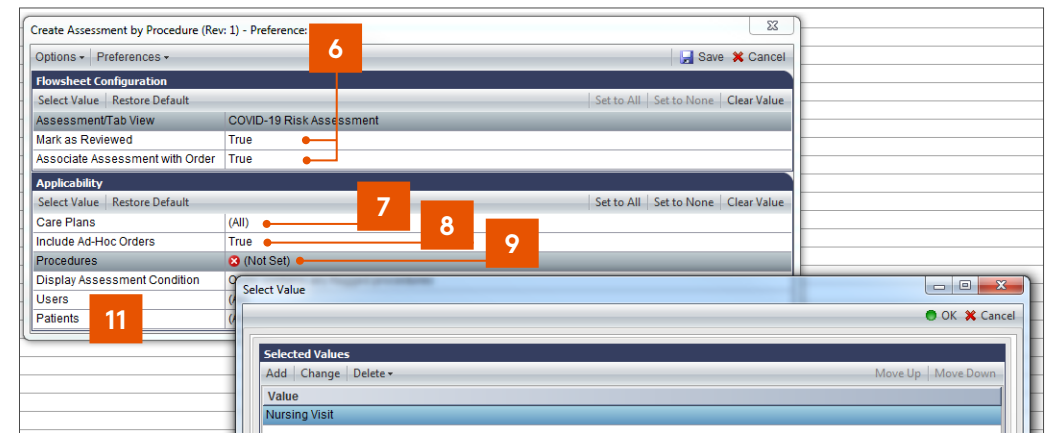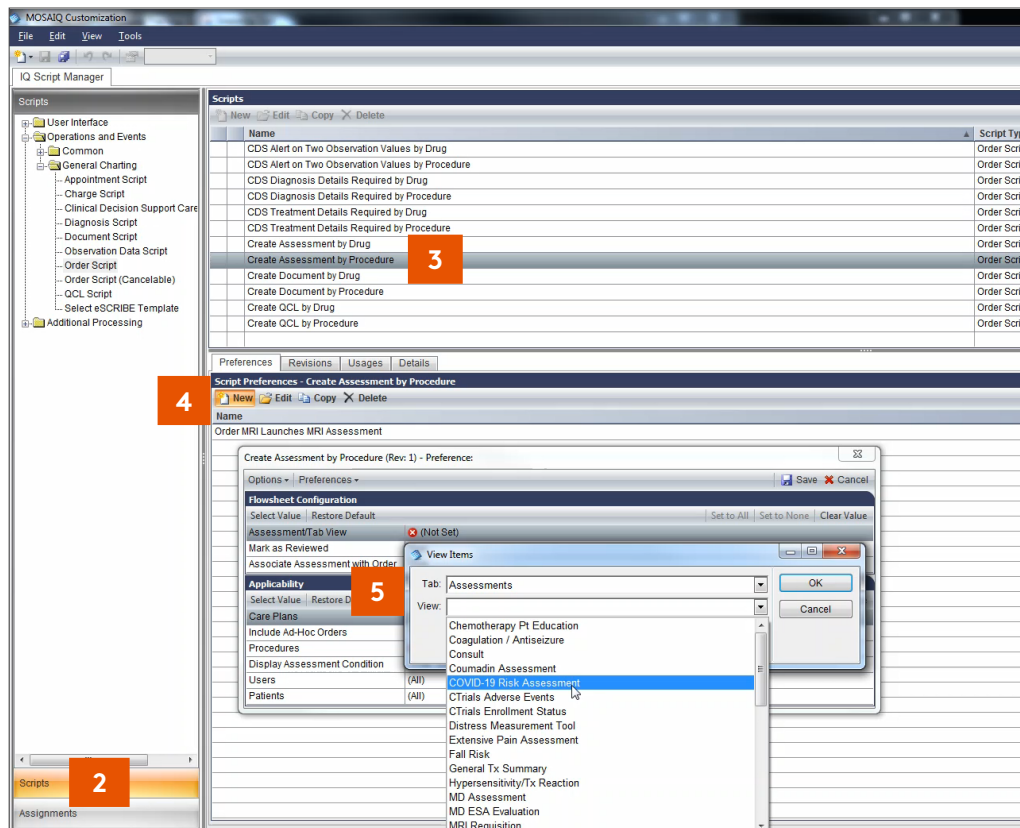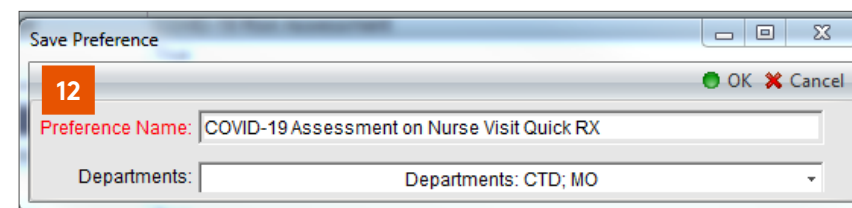# MOSAIQ IQ Script:
CDS Alert on Two Observation Values

Create and assign preference to generate a Clinical Decision Support (CDS) Alert when responses in a COVID-19 assessment warrant further follow-up

1) Click **File > System Utilities > IQ Engine Configuration**
2) Click **Scripts > Operations and Events > General Charting > Observation Data Script**
3) Click **CDS Alert on Two Observation Values**
4) Under preferences, click **New**
5) Select **Assessment** (to be presented for completion)

6) Select **CDS Reference**
7) Optionally, update **Assign To** and/or add a **Message**
8) Select **Data Item 1** and **Data Item 2** and their values
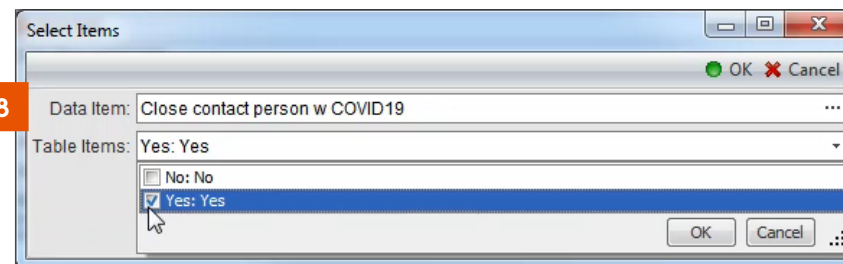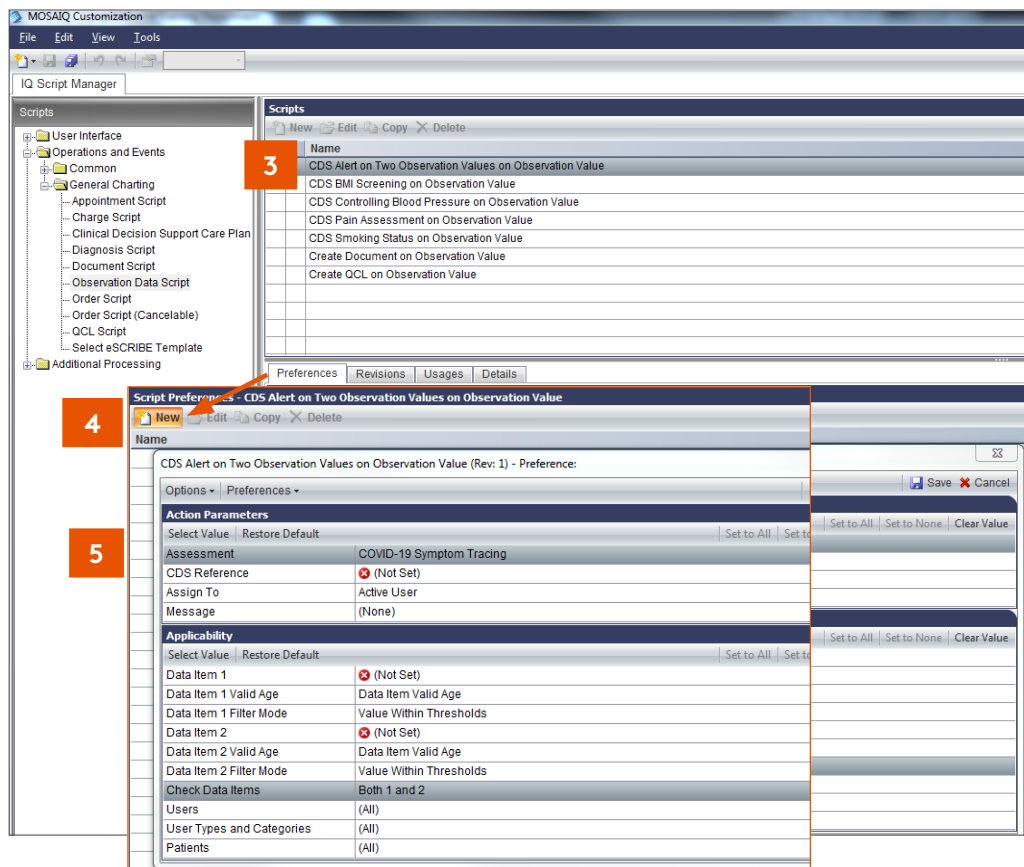
9) Optionally, update **Data Item 1** and/or **Data Item 2's Valid Age** and/or **Filter Mode** settings
10) Optionally update **Check Data Items** to **Either 1 or 2** from **Both 1 and 2**
11) Optionally select **User Types and Categories**
12) Optionally, set **Users** or **Patients** (for testing purposes only)

Elekta

Create and assign preference to generate a Clinical Decision Support (CDS) Alert when responses in a COVID-19 assessment warrant further follow-up

13) Name preference, select all relevant departments and click **OK** to save
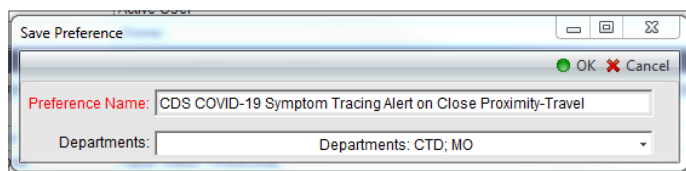
14) Click **Assignments > Operations and Events > General Charting > Observation Data**

15) Select one of **Observation Data Created** or **Observation Data Reviewed**

16) Under Script Assignments, click **New**

17) Select **CDS Alert on Two Observation Values script**
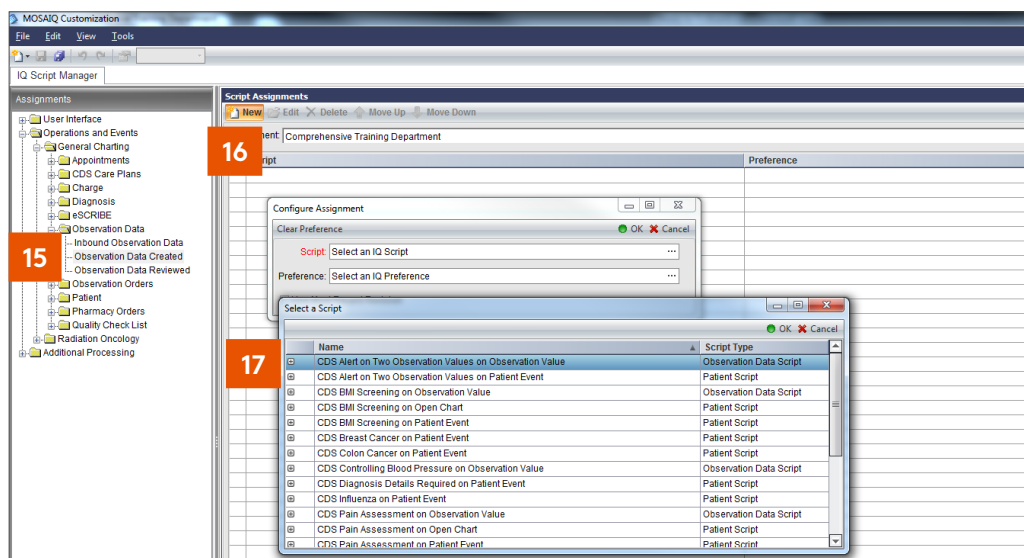
18) Select **Preference**
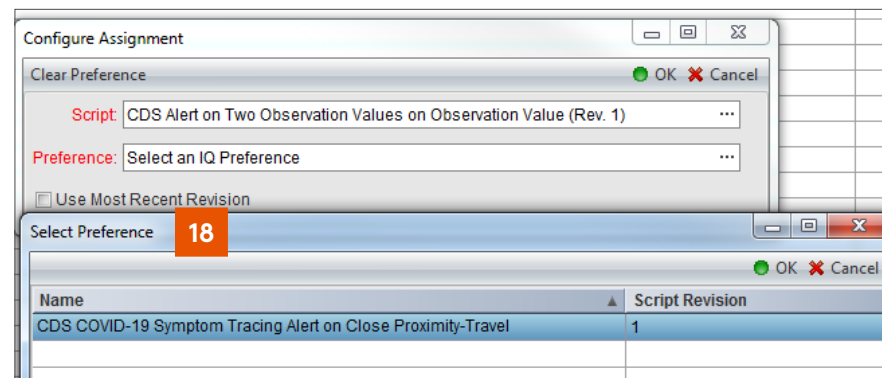
19) Click **OK** to save configuration assignment

20) Remember to repeat for all relevant departments
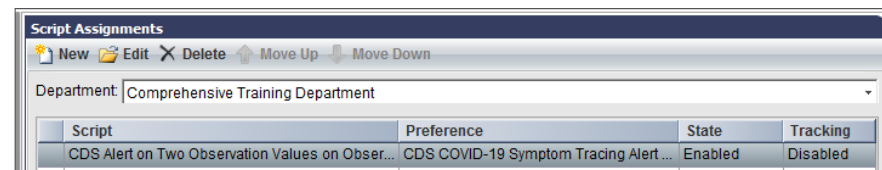
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Create and assign preference to create a QCL task when an observation order (procedure) is being approved or generated approved through Quick Rx
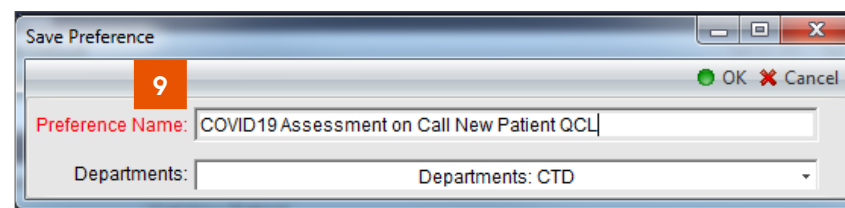
1) Click **File > System Utilities > IQ Engine Configuration**
2) Click **Scripts > Operations and Events > General Charting > Order Script**
3) Click **Create QCL by Procedure**
4) Under preferences, click **New**
5) Select **Task**

6) Optionally, set **Responsible Staff, Requesting Staff, Due Date (Base), Due Date (Add to Base), Billable Group, Billable Code, Instructions, Comment, Mark QCL Complete, Create QCL if Duplicate Exists?**
7) Optionally select one or more **Care Plans** and/or **Include Ad-Hoc Orders** to false
8) Select one or more **Procedures**
9) If selecting more than one procedure, optionally update **Create QCL Condition** to **Order contains any flagged procedure**
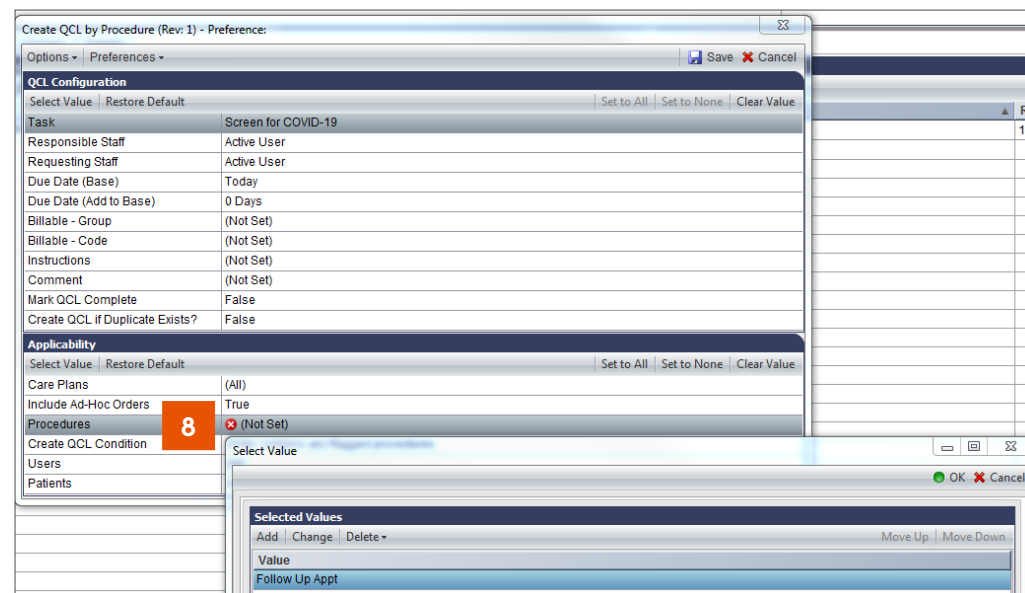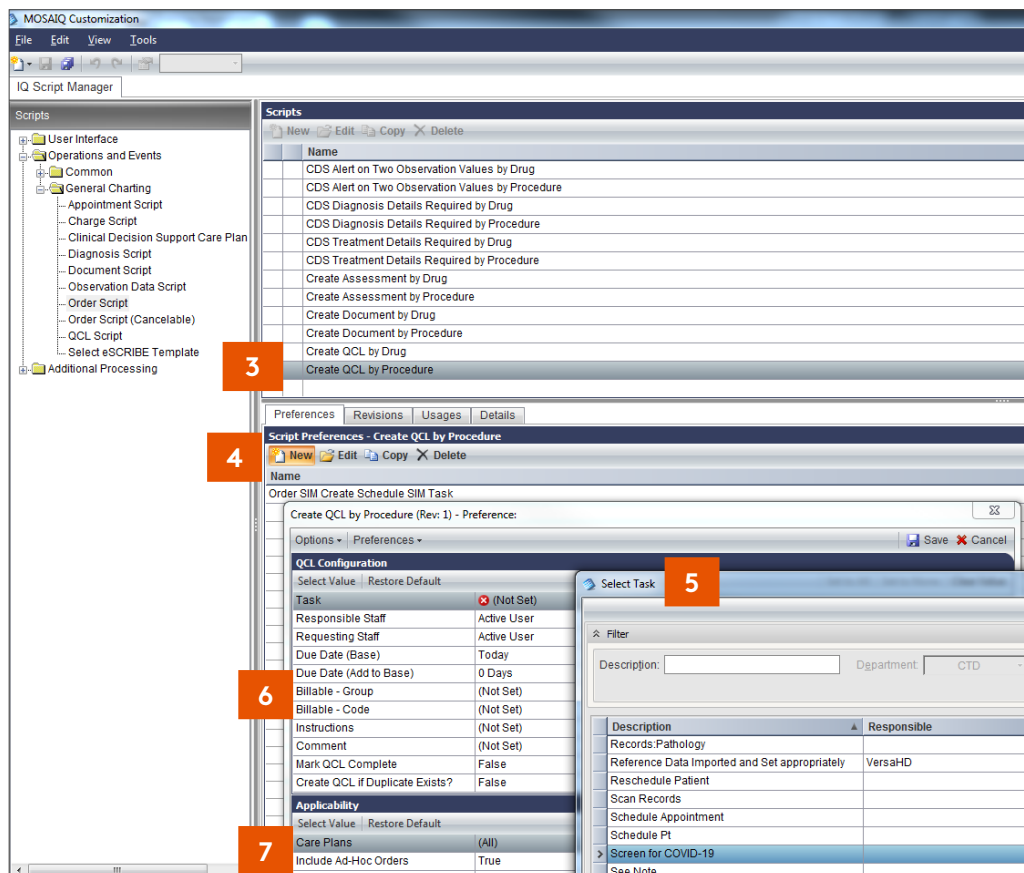
Create and assign preference to create a QCL task when an observation order (procedure) is being approved or generated approved through Quick Rx

10) Optionally, set **Users** or **Patients** (for testing purposes only)

11) Name preference, select all relevant departments and click **OK** to save

Save Preference
- Preference Name: Screen for COVID-19 on Follow Up Appt Orders
- Departments: Departments: CTD; MO
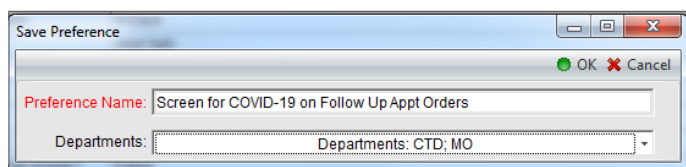
12) **Click Assignments > Operations and Events > General Charting > Observation Orders**

13) Click **Order Approved**

14) Under Script Assignments, click **New**

15) Select **Create QCL by Procedure** script

Configure Assignment / Clear Preference
- Script: Select an IQ Script
- Preference: Select an IQ Preference

Select a Script

Name	Script Type
CDS Pneumonia on Patient Event	Patient Script
CDS Smoking Status on Open Chart	Patient Script
CDS Smoking Status on Patient Event	Patient Script
CDS Treatment Details Required by Drug	Order Script
CDS Treatment Details Required by Procedure	Order Script
CDS Treatment Details Required on Patient Event	Patient Script
Create Assessment by Drug	Order Script
Create Assessment by Procedure	Order Script
Create Document by Drug	Order Script
Create Document by Procedure	Order Script
Create QCL by Drug	Order Script
15 Create QCL by Procedure	Order Script

16) Select **Preference**

Configure Assignment / Clear Preference
- Script: Create QCL by Procedure (Rev. 1)
- Preference: Select an IQ Preference

Select Preference **16**

Name	Script Revision
Order SIM Create Schedule SIM Task	1
Screen for COVID-19 on Follow Up Appt Orders	1

17) Click **OK** to save configuration assignment

18) Remember to repeat for all relevant departments

Script Assignments
New | Edit | Delete | Move Up | Move Down
Department: Comprehensive Training Department

Script	Preference	State	Tracking
Create Assessment by Procedure (Rev. 1)	Order MRI Launches MRI Assessment	Enabled	Disabled
Create QCL by Procedure (Rev. 1)	Order SIM Create Schedule SIM Task	Enabled	Disabled
Create Assessment by Procedure (Rev. 1)	COVID-19 Assessment on Nurse Visit Quick RX	Enabled	Disabled
Create QCL by Procedure (Rev. 1)	Screen for COVID-19 on Follow Up Appt Orders	Enabled	Disabled

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MOSAIQ IQ Script:
Create QCL on Observation Value

Create & assign preference to create a QCL task when a response on a COVID-19 assessment (observation value) requires further action

1) Click **File > System Utilities > IQ Engine Configuration**
2) Click **Scripts > Operations and Events > General Charting > Observation Data Script**
3) Click **Create QCL on Observation Value**
4) Under preferences, click **New**
5) Select **Task**
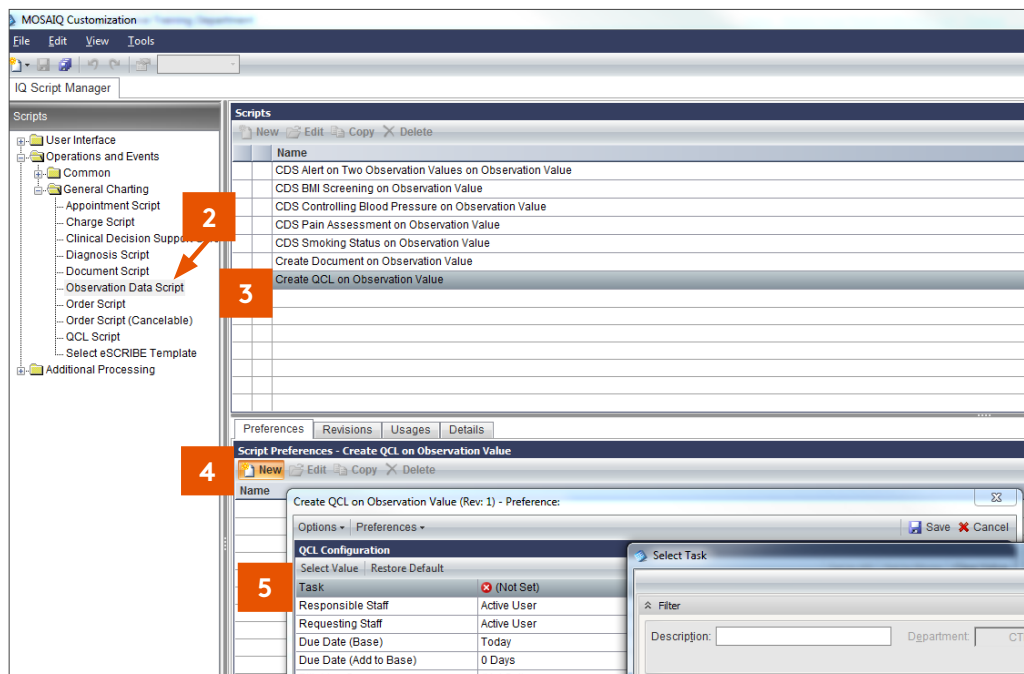
6) Optionally, set **Responsible Staff, Requesting Staff, Due Date (Base), Due Date (Add to Base), Billable Group, Billable Code, Instructions, Comment, Mark QCL Complete, Create QCL if Duplicate Exists?**

7) Optionally, set **Which Diagnosis, Diagnosis Code, View**
8) Select **Data Items with Thresholds**

9) Optionally set **Valid Age, Data Item Filter, Data Item Filter Mode**

10) Optionally, set **Users** or **Patients** (for testing purposes only)

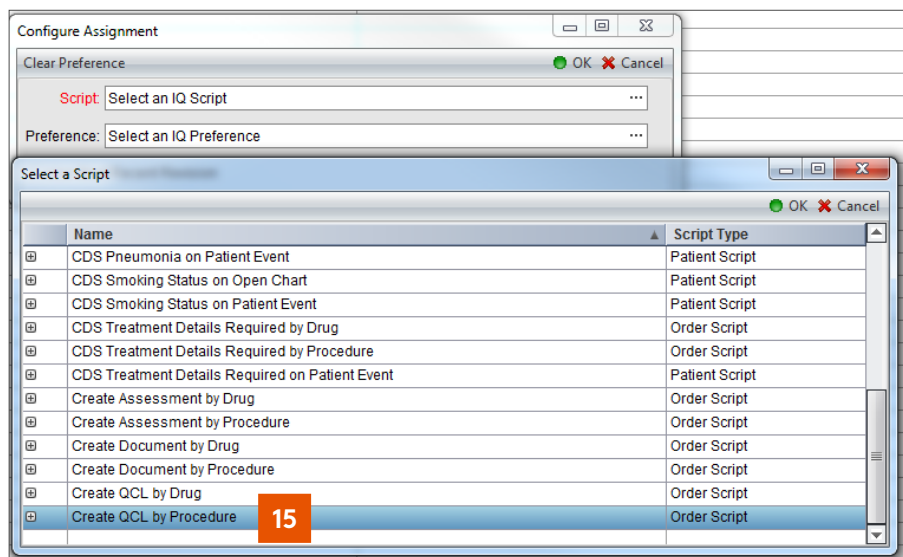11) Name preference, select all relevant departments and click **OK** to save

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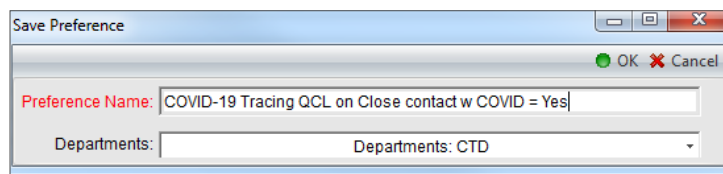
Create & assign preference to create a QCL task when a response on a COVID-19 assessment (observation value) requires further action

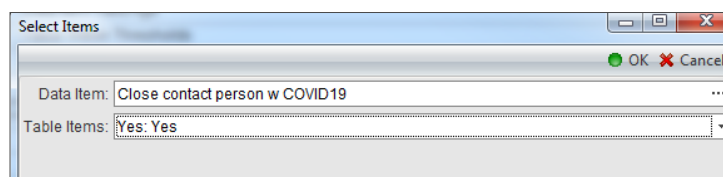12) Click **Assignments > Operations and Events > General Charting > Observation Data**

13) Click one of **Observation Data Created** or **Observation Data Reviewed**

14) Under Script Assignments, click **New**

15) Select **Create QCL on Observation Value** script

	Name	▲	Script Type
⊞	CDS Diagnosis Details Required on Patient Event		Patient Script
⊞	CDS Influenza on Patient Event		Patient Script
⊞	CDS Pain Assessment on Observation Value		Observation Data Script
⊞	CDS Pain Assessment on Open Chart		Patient Script
⊞	CDS Pain Assessment on Patient Event		Patient Script
⊞	CDS Pneumonia on Patient Event		Patient Script
⊞	CDS Smoking Status on Observation Value		Observation Data Script
⊞	CDS Smoking Status on Open Chart		Patient Script
⊞	CDS Smoking Status on Patient Event		Patient Script
⊞	CDS Treatment Details Required on Patient Event		Patient Script
⊞	Create Document on Observation Value		Observation Data Script
⊞	Create QCL on Observation Value **15**		Observation Data Script

16) Select **Preference**

Configure Assignment — Clear Preference — OK · Cancel

Script: Create QCL on Observation Value (Rev. 1) …

Preference: Select an IQ Preference …

Select Preference **16** — OK · Cancel

Name	▲	Script Revision
COVID-19 Tracing QCL on Close contact w COVID = Yes		1

17) Click **OK** to save configuration assignment

18) Remember to repeat for all relevant departments

Script Assignments

📄 New 📂 Edit ✕ Delete ⬆ Move Up ⬇ Move Down

Department: Comprehensive Training Department ▾

Script	Preference	State	Tracking
Create QCL on Observation Value (Rev. 1)	COVID-19 Tracing QCL on Close conta...	Enabled	Disabled

MOSAIQ IQ Script:
Document by Code Capture

Create and assign preference to create a Telehealth Visit Note document when a telehealth visit code is captured

1) Click **File > System Utilities > IQ Engine Configuration**
2) Click **Scripts > Operations and Events > General Charting > Charge Script**
3) Click **Create Document by Code Capture**
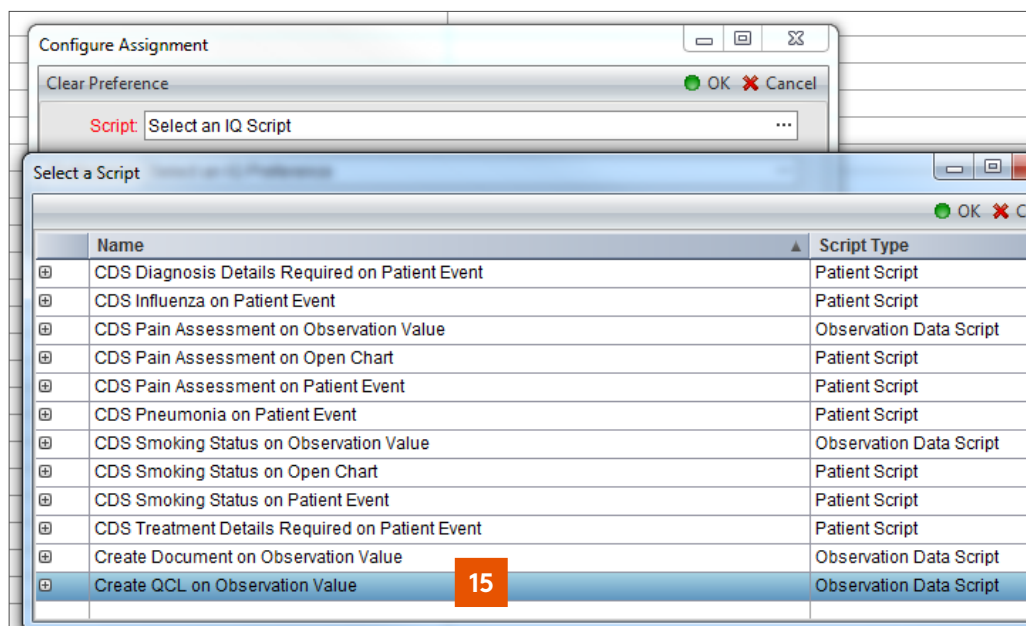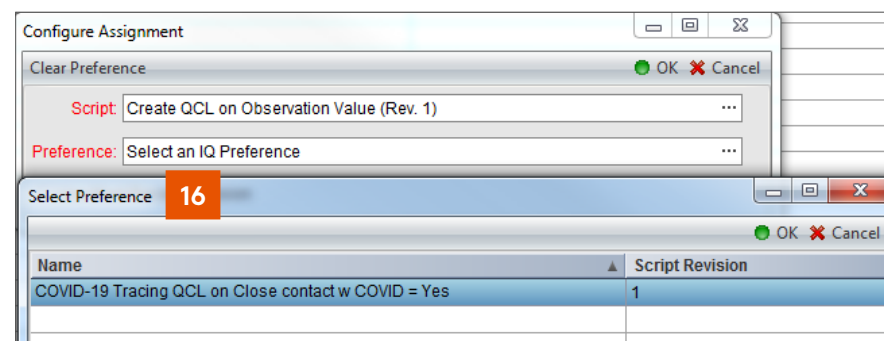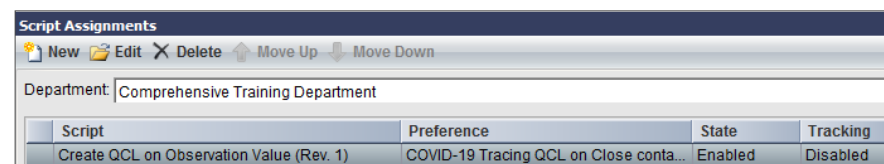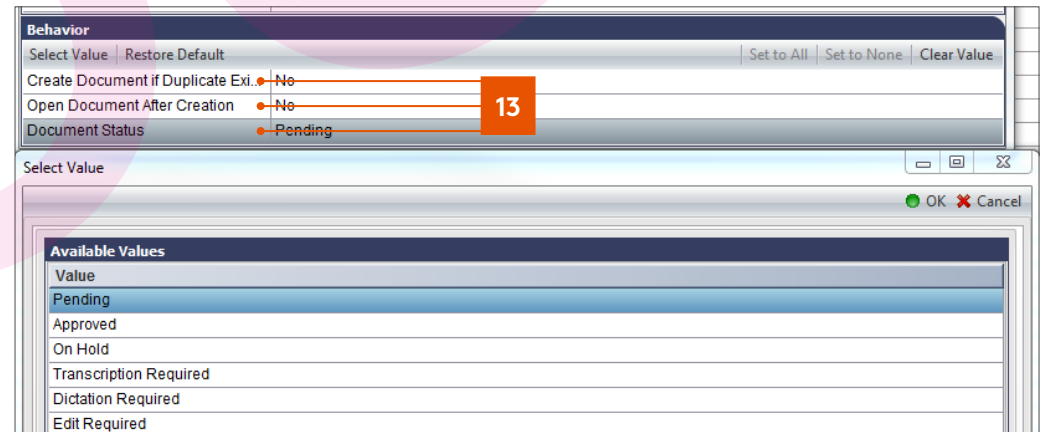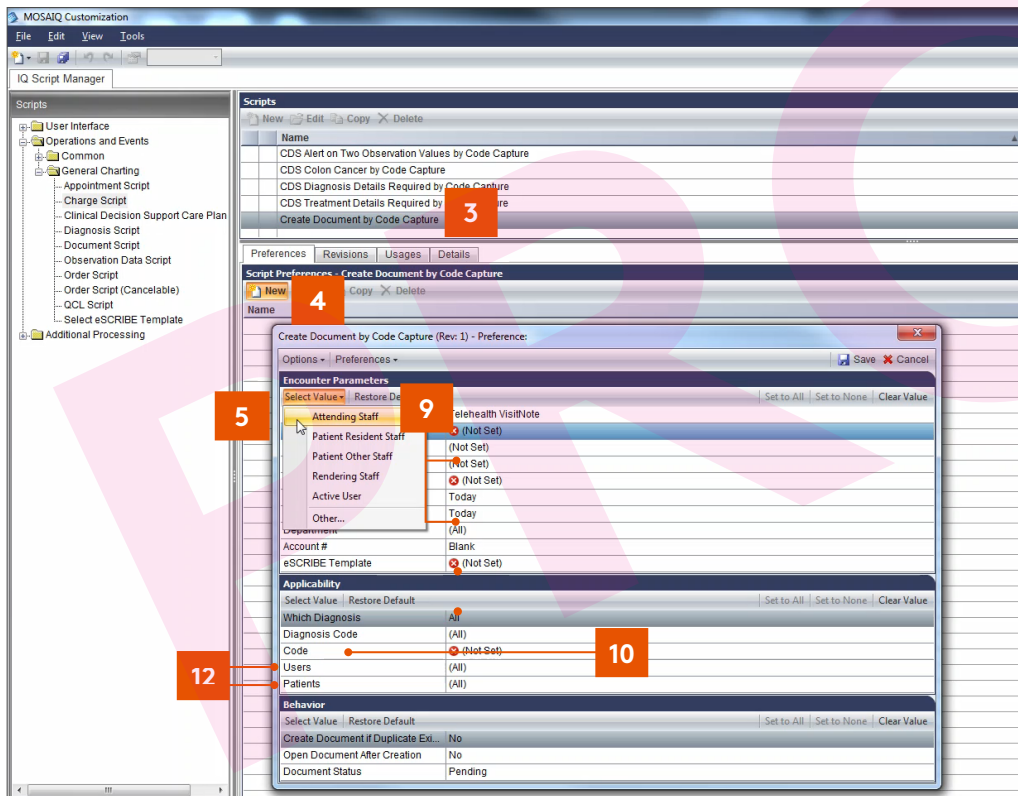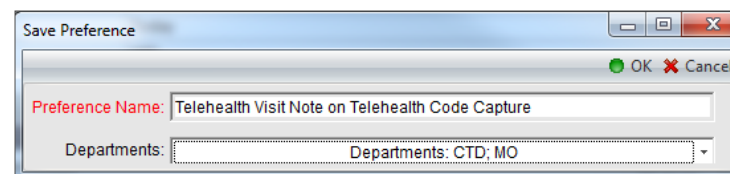4) Under preferences, click **New**
5) Select **Document Type**
6) Select **Dictated By, Transcribed By** and **eScribe Template**

7) Optionally, set **Review Required By, Co-sign Required By**
8) Optionally, update **Encounter Date, Transcribed Date, Department, Account #**
9) Optionally, update **Which Diagnosis** and/or **Diagnosis Code**
10) Select **Code**
11) If selecting more than one procedure, optionally update **Create QCL Condition** to **Order contains any flagged procedure**
12) Optionally, set **Users** or **Patients** (for testing purposes only)
13) Optionally, update **Create Document if Duplicate Exists, Open Document After Creation** and/or **Document Status**
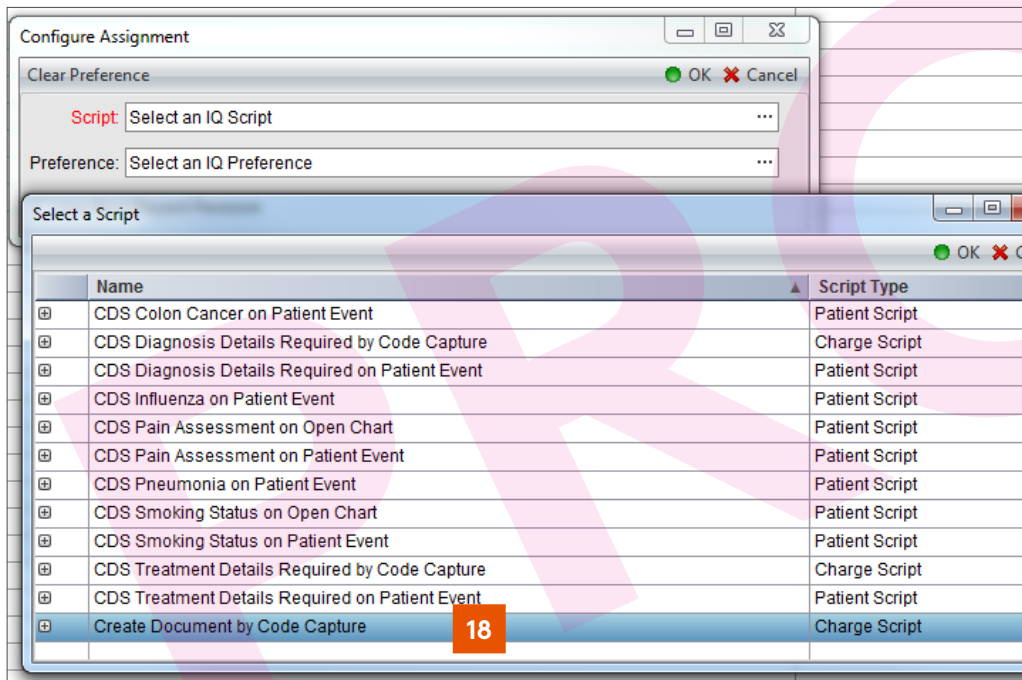

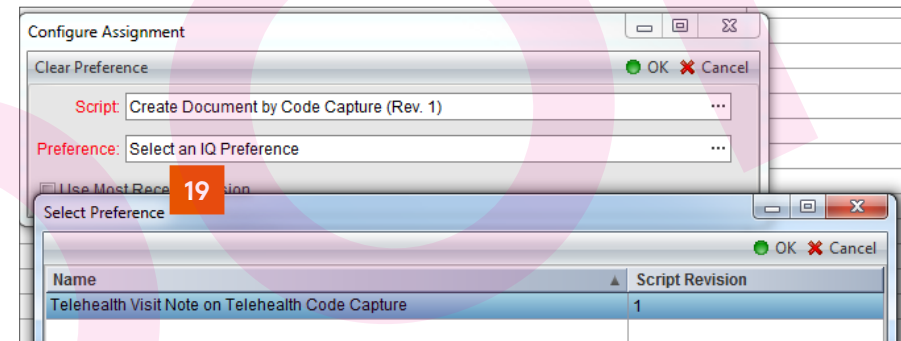14) Name preference, select all relevant departments and click **OK** to save

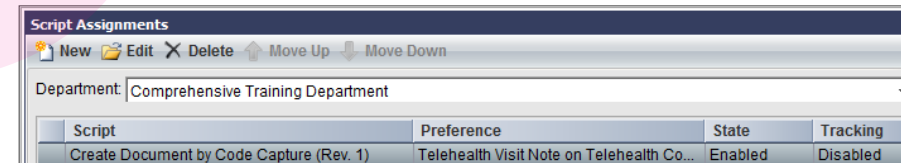# Create and assign preference to create a Telehealth Visit Note document when a telehealth visit code is captured

15) Click **Assignments > Operations and Events > General Charting > Charge**

16) Click one of **Code Captured**

17) Under Script Assignments, click **New**

18) Select **Create Document by Code Capture** script

Name	Script Type
CDS Colon Cancer on Patient Event	Patient Script
CDS Diagnosis Details Required by Code Capture	Charge Script
CDS Diagnosis Details Required on Patient Event	Patient Script
CDS Influenza on Patient Event	Patient Script
CDS Pain Assessment on Open Chart	Patient Script
CDS Pain Assessment on Patient Event	Patient Script
CDS Pneumonia on Patient Event	Patient Script
CDS Smoking Status on Open Chart	Patient Script
CDS Smoking Status on Patient Event	Patient Script
CDS Treatment Details Required by Code Capture	Charge Script
CDS Treatment Details Required on Patient Event	Patient Script
Create Document by Code Capture	Charge Script

19) Select **Preference**

20) Click **OK** to save configuration assignment

21) Remember to repeat for all relevant departments

**Script Assignments**

New Edit Delete Move Up Move Down

Department: Comprehensive Training Department

Script	Preference	State	Tracking
Create Document by Code Capture (Rev. 1)	Telehealth Visit Note on Telehealth Co...	Enabled	Disabled

MOSAIQ users are responsible for following applicable data privacy and protection laws.

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MOSAIQ IQ Script:
Import a Screening Assessment
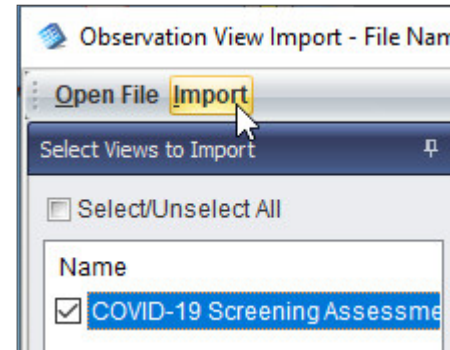
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Import a COVID-19 screening Assessment form

1) Download Assessment *Optional: Download Custom Layout*
2) Save to an accessible location
3) In MOSAIQ, select **File > Import/Export > Observation View > Import**
4) To import Assessment: Select **Open File,** navigate to **COVID19_Assessment_<date>.xml**
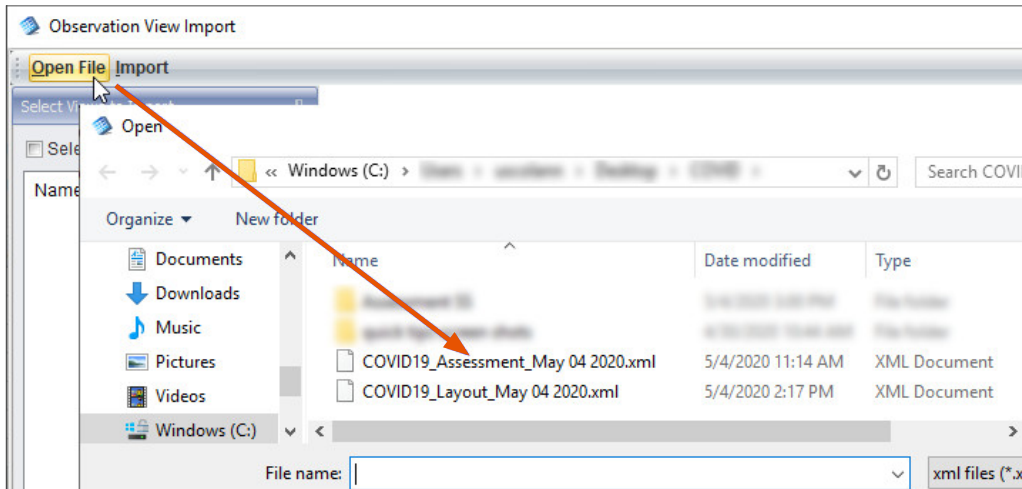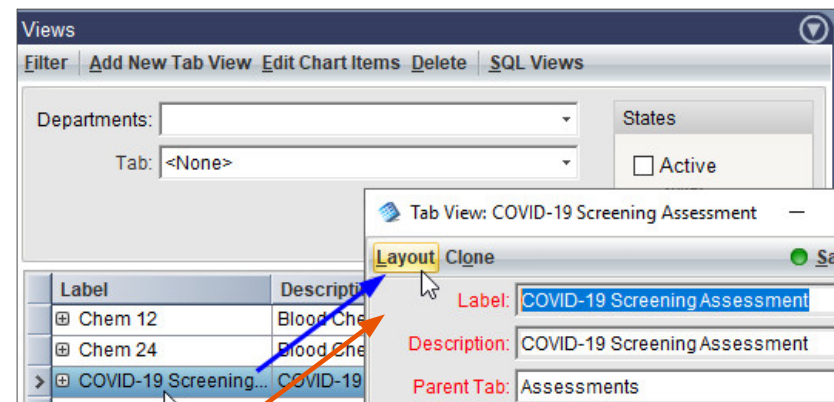

5) Reconcile any conflicts
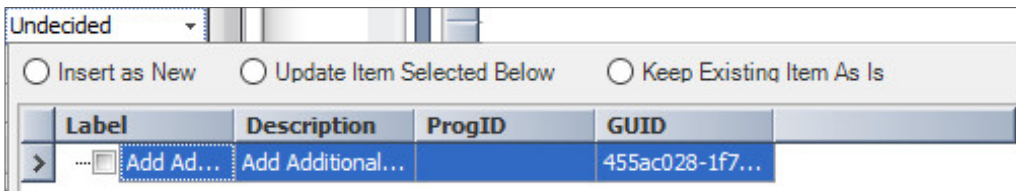
6) Select checkbox, select **Import**

7) Add or remove content using **Chart Builder** (see Quick Guides)
8) Configure a **Merge Field** or **Merge Field Widget** if desired (see Quick Guides)

Optional: Apply a Custom Layout

1) Double-click COVID-19 Assessment, select Layout

Import a COVID-19 screening Assessment form

2) Select **Layout Options > Customize Layout.** Search folder and navigate to **COVID19_ Layout_<date>.xml.** Resize if desired and **Save.**

Custom Layout: