Clinical Information Support System (CISS) Occupational Health Record-Keeping System (OHRS)

User Guide

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Revision History

Date	Doc Version	Software Version	Description	Author
6/14/18	2.0	1.4.17	Change in software version	HPS Clinical Sustainment Team
9/28/17	2.0	1.4.16	Update Figures 2, 3, 6 & Section 1.11 per change in helpdesk telephone number.	HPS Clinical Sustainment Team
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1 Getting Started

1.1 Getting Started in OHRS

The Occupational Health Record-keeping System (OHRS) is a web-based application that enables occupational health staff to create, maintain, and monitor medical records for VA employees and generate national, Veterans Integrated Service Network (VISN), and site-specific reports.

The OHRS help topics provide detailed information to assist Clinical Information Support System (CISS) site staff members and other users to successfully use CISS and OHRS.

REF: The OHRS documentation is located on the VA Software Document Library (VDL) .

1.2   Logging into CISS OHRS

To log into OHRS, you *must* be authorized to use the CISS Web application and OHRS:

1. Use an Internet browser to navigate to the REDACTED.

Figure 1: OHRS – VA Single Sign-on Screen
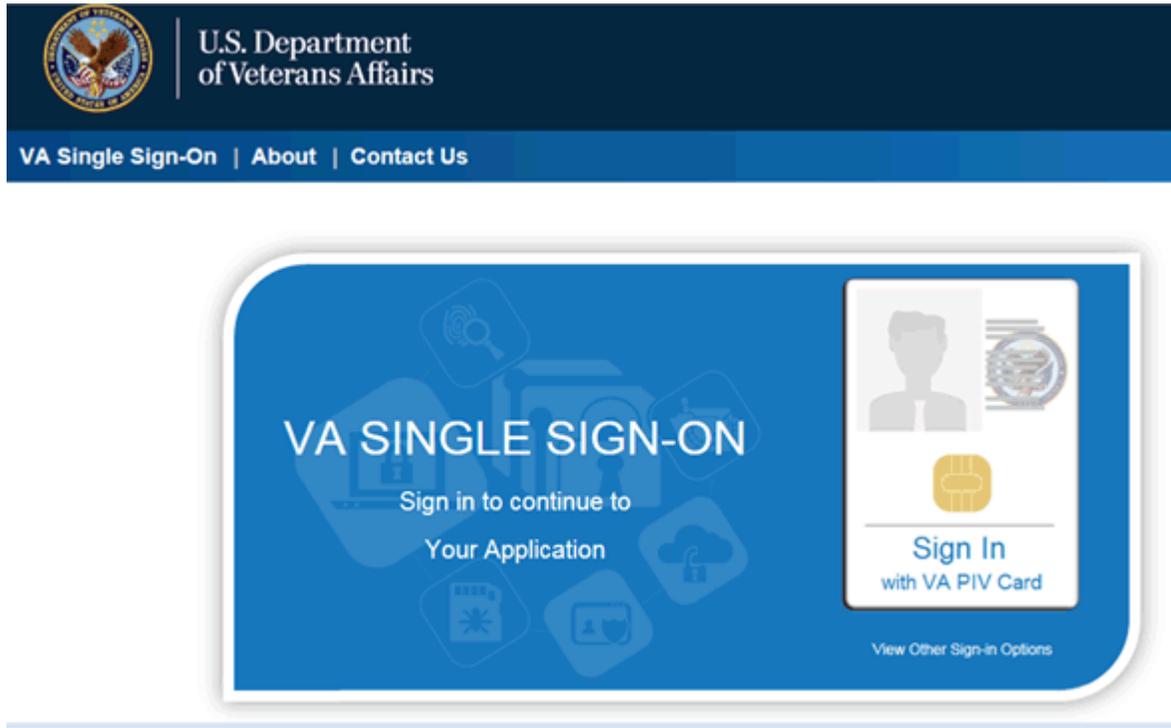
2. Select **Sign In with VA PIV Card**.

> **NOTE:** If a user has lost their PIV card, it may be possible to log in using access and verify codes. To use this option, select View Other Sign-In Options and then select Sign in with Windows Authentication.

3. With your PIV card inserted, enter your **Personal Identification Number (PIN)** to access CISS and select **OK**.

Figure 2: OHRS: PIN Entry Dialog
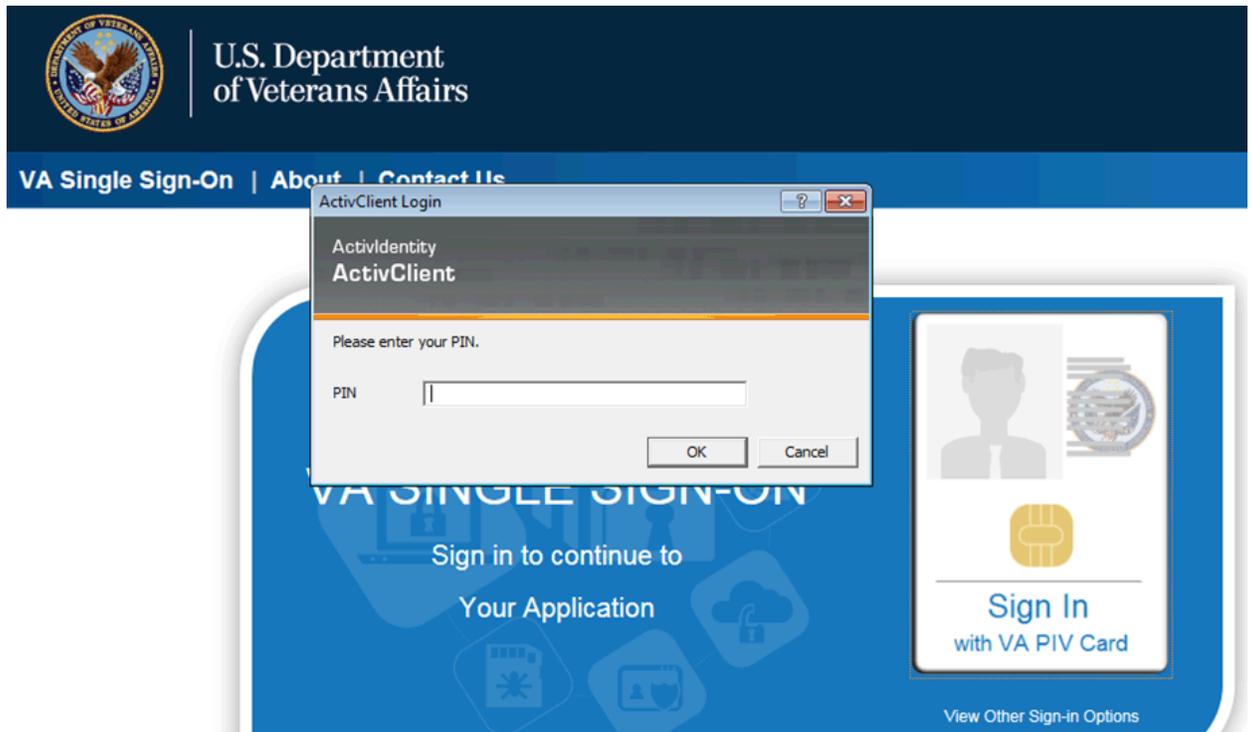
NOTE: If you need access to this application or need help with your PIN, please log a ticket with the VA Enterprise Service Desk (ESD) 1-855-673-4357.

4. After logging into CISS, the CISS portal (Home page) opens. It describes CISS and the Occupational Health Record-keeping System (OHRS) as the first CISS partner system.

To access the OHRS application, click the **OHRS** button located at the upper right corner on the page under the banner. The button is a link that opens the OHRS application.

> **i** **NOTE**: You *must* have the appropriate security privileges to access OHRS, or the option does *not* display on the CISS page.

Figure 3. OHRS Website—Main Page

> **i** **NOTE**: If you experience other problems with OHRS, use the contact information located at the bottom of the application page to get support.

1.3 Logging Out

The Logout basic flow begins when you choose to log out of the system and ends when you exit the system.

1. Click the **Log Out** link on the top right of the OHRS page.

2. A confirmation message is displayed.

3. Click **OK** to confirm or **Cancel** to remain in the OHRS system.

> **i** **NOTE**: The OHRS system automatically logs you out if you engage in no system activity for 15 minutes.

1.4 Login Lockout

If you attempt to log in with an incorrect password or Network User ID, the system gives you a warning message.

The system automatically locks you out if you do not enter the correct Network User ID or password on the third consecutive attempt. If this happens, you need to contact your local OHRS administrator to have your Network User ID unlocked.

The system displays a message that reads:

"You are currently locked out of the system. Please contact your OHRS System Administrator."

1.5 Automatic Timeout

The system automatically logs you out after 15 minutes of inactivity. A warning message displays, counting down from 60 seconds until you are logged off the application. You can click the **OK** button to stop the countdown and continue working.

⚠️ **CAUTION: Be aware that if the system automatically logs you off, your work is *not* saved.**

Figure 4. OHRS—Session timeout countdown
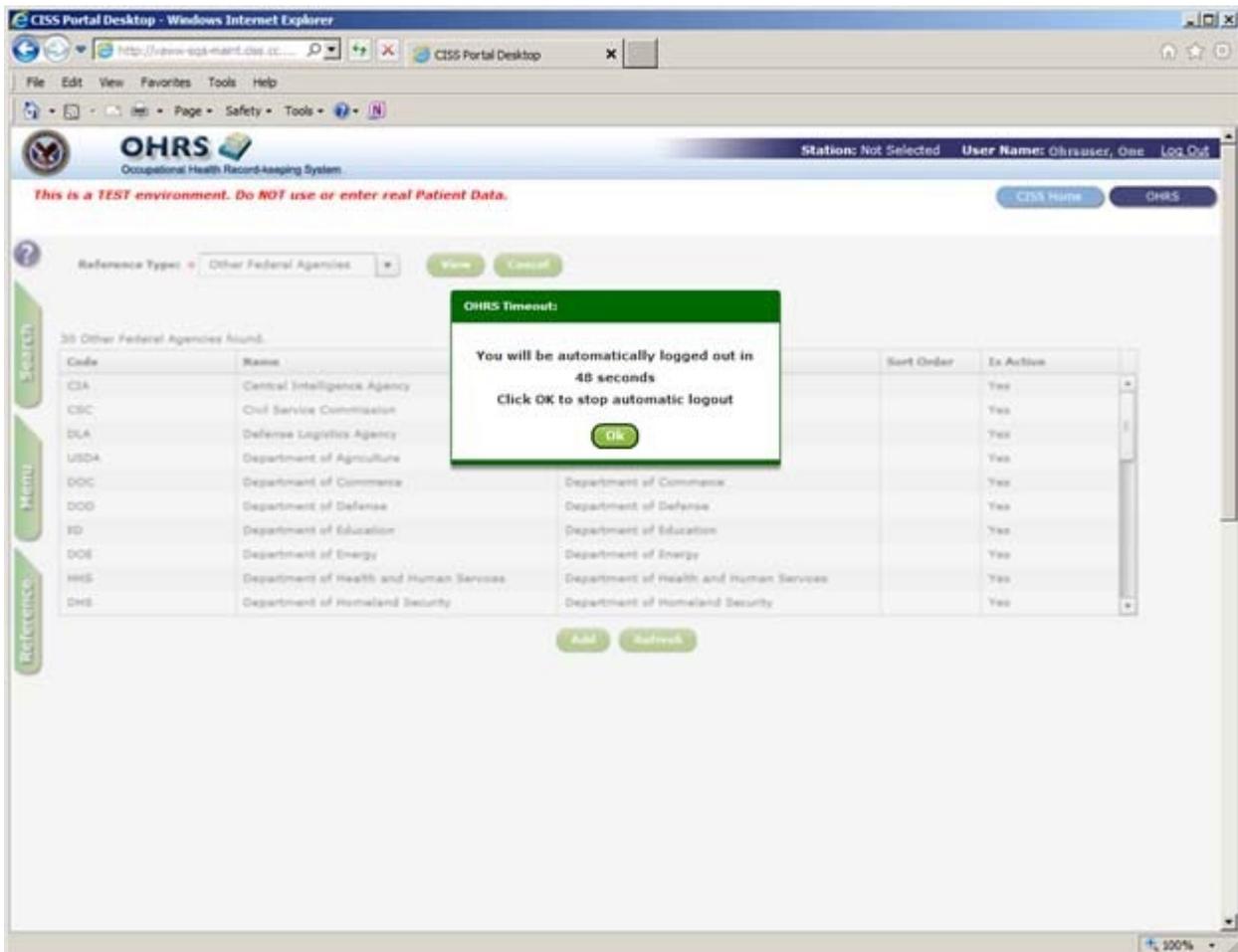
1.6 Selecting a Functional Station

When signing in, users may be prompted to choose the functional station in OHRS that they wish to access. Health care providers see stations on a drop-down list where they have been assigned to work. The stations listed are determined by their profiles that have been set up in OHRS. Once selected, the station appears in the context bar at the top right side of the page.

1. Select the appropriate station from the drop-down list.

2. Click **Select** to display the OHRS home page.

There are two types of stations in OHRS:

- Duty Station—Location where a person is based (typically, it is where a person receives a paycheck). It can be a place where health care is not provided, such as a national cemetery or an office building.

- Functional Station—Location where health care is provided (a treating facility), such as a VA medical center (VAMC) or clinic.

NOTE: National Administrators who wish to generate reports do not see the page where they would select a Functional Station, since their reports can span several stations and they have access to all of them.

1.7   OHRS General Web Page Layout

Figure 5 is an example of a basic OHRS application Web page layout:

Figure 5. OHRS—Web Page Layout

The OHRS Web page consists of the following components:

- Banner
- Context Bar
- Menu
- Content Area
- Footer
- Help Button

1.7.1   Banner

The Banner is a graphical area on the Web page that displays the following:

- Department of Veterans Affairs (VA) logo.
- Parent system logo, which is the Clinical Information Support System (CISS).
- Name of the partner application logo (e.g., OHRS, Occupational Health Record-keeping System).
- Photos of typical VA employees or clients.

1.7.2   Context Bar

The Context Bar is the dark blue band under the Banner. On the right side, below the graphics on the Banner, it displays the following:

- User's Duty Station
- User Name
- Log Out link

There are also buttons (links) of the applications that the user has permissions to use. If the user is an administrator, they can sign on with no duty station specified until they begin to perform the functions they have authorization to do.

1.7.3   Menu

The Menu area is a list of items (tabs) on the left side of the Web page. The Menu displays the actions that are available to you, based on your role.

i   **NOTE**: At the top of the Menu is the **Quick Search Bar**.

i   **REF:** For more information on searching, see the "Searching for or Selecting a Patient" section.

1.7.4   Content Area

The Content Area is a section of the Web page that displays the following:

- Explanatory Text.
- Tasks—Where all input, viewing, and OHRS tasks are performed.
- Alert Messages—If you have any alerts, an alert link is displayed here.
- Error Messages—If there are any error messages to your input, they display here.
- Links (which look like buttons)—CISS Home and to the OHRS application.

1.7.5   Footer

The Footer is displayed at the bottom of every Web page. It displays the following:

- Application Version.

- Copyright Date.

- Link to contact the application owners.

Figure 6. OHRS—Footer

1.7.6   Help Button

Clicking the **Help** button (**?**) on each page displays a context-sensitive Help page that contains information specific to the tasks that can be performed on that application page.

The Help page has a "Show Help TOC" link that, when clicked, displays the Table of Contents (TOC) for the entire help file.

There is also a breadcrumb trail at the top of the Web page that shows the location of the help topic in the larger Help file.

1.8 Accessing the Occupational Health (OH) Staff and Administrator Directories

As an OHRS user, you can search, view, and sort the Occupational Health (OH) Staff and Administrator Directories.

To access the Occupational Health (OH) Staff and Administrator Directories:

1. From the left side of the OHRS Home Page, click the **Reference** tab to display a fly-out menu for **Occupational Health Directory** and submenus for **OH Staff Directory** and **Administrator Directory** (see Figure 7).

Figure 7. OHRS—Occupational Health Directory and submenus for OH Staff Directory and Administrator Directory
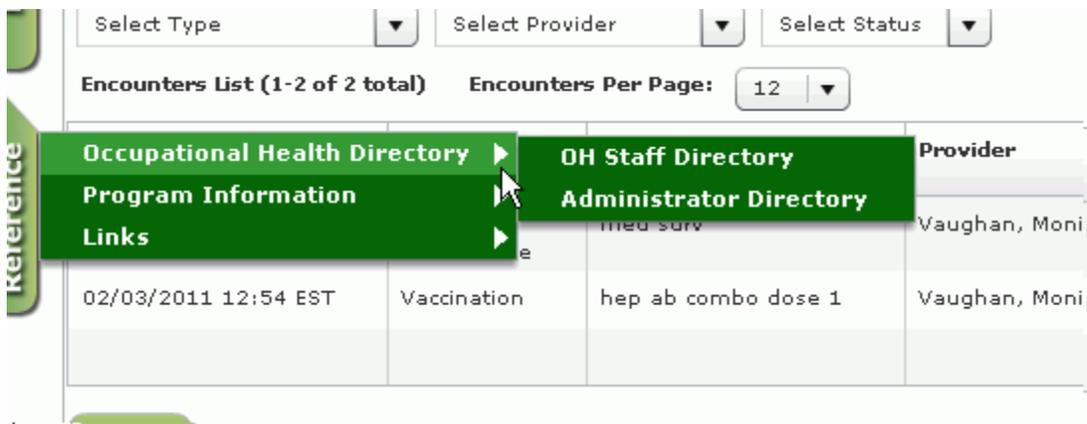
2. Select either directory's name to display it.

The Occupational Health (OH) Staff and Administrator Directories allow you to search by the following criteria:

- Last Name
- First Name
- Role
- Station
- VISN

You can send an email to individual or multiple staff members from the OH Staff Directory page:

1. Select the staff member(s) to receive the email.
2. Click **Send Email**.
3. The system opens a Microsoft® Outlook email message page and pulls the staff email addresses into the "**To:**" line.

1.9   Displaying an Encounter's Notification Tab

Notifications are a text-based electronic messages linked to a patient encounter. They are messages that providers communicate regarding a patient's WorkAbility status (i.e., the patient is or is not available to work), reminders to a patient to return for follow-up care, etc.

Notifications can be generated manually or automatically. The system can automatically send notifications to a recipient when a patient encounter trigger is met, or a provider can manually select a notification and send it to a designated recipient. The recipient's work email address *must* be included.

The **Notifications** tab on a Patient record displays *all* of the notifications that exist for the patient.

Every notification is tied to an encounter. Depending on which encounters you are responsible for (i.e., if you created the encounter or are its expected co-signer), you can see various buttons and do various things with the notification. The one activity you *cannot* do from this page is to create a notification; that *must* be done in conjunction with the encounter itself (see the "Creating and Sending Notifications" section).

Depending on your association with the notification's encounter, you can print, send, re-send, and view the notification, or any combination thereof.

1.9.1   Printing a Notification

To print a notification:

1.   Select a notification from the list.

2.   Click **Print** to display the Notification as a PDF that you can print.

1.9.2   Sending an Email Notification

You can email a pending notification if you have the rights. Check the Status column.

If you do, the following dialogue displays.

NOTE: Review what you can do in this dialogue.

Figure 8. OHRS—Notifications tab: Email Notification

To send the notification:

1. Enter the appropriate email address (an example is shown in Figure 8).

2. Click **Add**.

3. Click **Email**.

NOTE: If you want to remove an email address before you send it, you can click **Remove**. You can also **Cancel** the action. You *cannot* edit the notification.

1.9.3   Re-sending an Email Notification

If you have the rights, you can re-send an email notification if it is complete, but it will be re-sent to the original recipient only.

If you re-send an email notification, the system displays a message.

1.10 Displaying the SOAPE Tabs

There are specific tabs within the **Encounter** tab itself that require data entry when you are creating a new encounter, regardless of the Encounter Type. The tabs are named:

- **S**ubjective
- **O**bjective
- **A**ssessment
- **P**lan*, which has two additional tabs:
  o Plan*
  o Plan Comments
- **E**ncounter Codes*, which also has two additional tabs:
  o Diagnosis Codes*
  o Procedure Codes*

This group of tabs is referred to by the **SOAPE** acronym. You can see examples of the SOAPE tabs for a various encounters:

- Creating a Medical Surveillance Encounter.
- Creating a Vaccination Encounter (General Health).
- Creating a Pandemic Influenza Encounter.

NOTE: The first tab changes (and is not defined as SOAPE), depending on which encounter type you are entering. It gives you relevant information; for example:

- Vaccination history for vaccination encounters
- Respirator information for Medical Surveillance encounters
- Evaluation method for Pandemic Influenza encounters

REF: For information on how to enter data in these various tabs, see the "Creating a Vaccination Encounter (General Health)" section.

1.11 Logging a Remedy Ticket

If the application gives you an error at the time you log on or if you receive error messages that are *not* part of data entry (e.g., if you have not filled out an encounter correctly), you can:

- Contact the VA Enterprise Service Desk (ESD) to log a CA ticket – email VASD@va.gov or call 1-855-673-4357.
- If you have the knowledge and access, you can log a Remedy ticket yourself.

1.12 System Requirements

1.12.1 Understanding System Requirements

To use the CISS application, you *must* have:

- Access to the Veterans Health Administration (VHA) Intranet via Microsoft® Internet Explorer Version 6.0 or higher, with Service Pack (SP) 2.
- Standard 128-bit encrypted security (Secure Socket Layer [SSL]) implemented on your computer; your system administrator can help if you do not know how to install it.
- The latest version of Flash Player installed on your computer; if you do not have it installed, a message displays, instructing you to contact your Information Technology (IT) point of contact to get the correct version of Flash Player installed.
- An authorized user account that includes a defined user role within the application.

1.13 Application Conventions

1.13.1 Application Conventions

The OHRS help includes documentation conventions, also known as notations, which are used consistently throughout the topics.

Table 1: Application Conventions

Convention	Example
<**Enter**> or **Enter** indicates that the user *must* press the **Enter** key (or Return key on some keyboards).	Type **Y** for Yes or **N** for No and press **Enter**.
<**Tab**> or **Tab** indicates that the user *must* press the **Tab** key.	Press **Tab** to move the cursor to the next field.
Bold typeface in a numbered list means a selection from a tab, menu, link, or button.	Select Patient from the **ABC** menu on the **XYZ** tab. Click the **Log Out** link. Click **OK**.

> **NOTE:** For Section 508 conformance, instructions are written, "to click" the mouse button. Alternatively, you can instead use the **Tab** or **Arrow** keys to move to a button/link and press **Enter** on the keyboard instead of using the mouse to click.

1.13.2 Hot Keys

Information about Microsoft® keyboard shortcuts can be found at
http://www.microsoft.com/enable/products/keyboard.aspx

1.13.3 Required Fields

All required fields in OHRS are marked with an asterisk (*****). If required fields are left blank and you attempt to create or change a record, the system responds with an error message.

1.13.3.1   Deleting Non-Required Radio Buttons

Some entry screens have non-required choices displayed as radio buttons. If you mark one of these radio buttons unintentionally or want to leave it blank after you have selected one of them, press the **Delete** key.

> **NOTE**: You *cannot* delete a selection of a required radio button choice. You can only delete one non-required radio button at a time. If several radio buttons have been selected and you press the **Delete** key, only the last radio button is "blanked out."

1.13.4 Screen Resolution

To work with OHRS, your screen resolution optimally should be greater than 1024 x 763; however, the application works with the VA's lowest common denominator resolution of 800 x 600—you may have to scroll horizontally in some cases at that lower screen resolution.

1.13.5 Right (Alternate) Mouse Button Menu

On some lists, it is displayed in table format, OHRS displays a **Right** (or **Alternate**) mouse-button command list. For example, on the list of completed reports, you can use the **Alternate** mouse button (right click) to see a list of the commands that you can perform on a report.

2   Section 508 Requirements

2.1   Section 508 Compliance

The CISS-OHRS project team has worked closely with the VA's Section 508 office to assure that the application can be used with assistive technology software. Users with disabilities can use a variety of assistive technology software programs to access and navigate CISS-OHRS.

REF: For more information, see the "Right (Alternate) Mouse Button Menu" section.

On lists that display in table format, OHRS displays a **Right** (or **Alternate**) mouse-button command list. For example, on the list of reports, you can use the **Alternate** mouse button to see a list of the commands that you can perform on a report.

REF: For a description of an alternate method the CISS-OHRS application uses to comply with accessibility for combo boxes, see the "Section 508 Compliance for Combo Boxes" section.

REF: For more information regarding Section 508 Compliance and Assistive Technology (AT), go to the following links:

- Information on Section 508 for the VA: REDACTED

- JAWS Earlier Thumb Drive Releases website: http://www.freedomscientific.com/downloads/jaws/JAWS-previous-downloads.asp#EarlyThumbDrive

- JAWS Keystrokes: http://www.freedomscientific.com/training/training-JAWS-keystrokes.htm

  JAWS NOTE: If a user is using JAWS with the flex application, the vendor recommends that the tool not be configured with auto forms mode turned off.

- GW Micro Window Eyes: http://www.gwmicro.com/

There is a Section 508 compliant menu in OHRS.

REF: For a description of the OHRS menu, and how it adheres to Section 508 compliance, see the "Section 508 for the OHRS Menu" section.

2.2   Section 508 Compliance for Combo Boxes

For the purpose of this topic, a combo box is defined as a drop-down box (list) where the user *must* choose a specific value from a list or select a date from a Calendar interactive dialogue.

For Section 508 Compliance, Microsoft® standards use the **Alt** key plus the **Up** or **Down Arrow** key for keyboard selection (as opposed to a mouse click) on combo boxes. CISS-OHRS was developed with a tool that does *not* employ the Microsoft standard.

In CISS-OHRS use the Control (**Ctrl**) key plus the **Up** or **Down** directional arrows) to select from a combo box:

- **Ctrl + Up Arrow**
- **Ctrl + Down Arrow**

2.3   Section 508 for the OHRS Menu

The OHRS Menu is Section 508 compliant.

To use the OHRS Menu without the mouse:

1. Use the **Tab** key to tab to the OHRS **Menu**. It displays a light line surrounding it when it is selected.
2. Press **Enter** or the **Space Bar** to expand the menu.
3. Use the **Arrow** keys to expand each expandable menu.
4. Press **Enter** for the menu item you want.

2.4 Additional Keyboard Navigation for Section 508 Compliance

Primarily, you use the **Tab** key to navigate the page. When an item has focus, you see an outline or some type of highlighting on the page to indicate that the functionality has focus and you can act on the item with keystrokes from the keyboard. The following keys perform the actions described in the associated linked topic:

- Space Bar

- Up/Down Arrow Keys

- Left/Right Arrow Keys

- Enter Key

- Escape Key

- Tab Key

- Ctrl + Down Arrow Keys

- Ctrl + Home Keys from OHRS

2.4.1 Space Bar

When an item is in focus, you can use the **Space Bar** to:

- Select buttons.

- Select links.

NOTE: The OHRS link is an exception; you need to use the **Enter** key to navigate the OHRS link from the CISS home page.

- Select items from a list.

2.4.2 Up/Down Arrow Keys

When an item is in focus, you can use the **Up/Down Arrow** keys to:

- Select items on the main **Menu** tab.

- Select and/or scroll through items in drop-down lists.

- Scroll through a list.

- Select and/or scroll through items on a grid list or search result list, such as lists displayed on the "Alerts" page, the patient search result pages, the duty station list, report list, etc.

2.4.3   Left/Right Arrow Keys

When an item is in focus, you can use the **Left/Right Arrow** keys to expand and collapse the menus and sub-menus on the **Menu** and **Reference** tabs.

2.4.4   Enter Key

When an item is in focus, you can use the **Enter** key to:

- Select a button.
- Select items on a list.
- Select links.

2.4.5   Escape Key

When an item is in focus, you can use the **Escape** key to collapse and exit the **Menu** and **Reference** tab fly-out menus and sub-menus.

2.4.6   Tab Key

Whenever a **Cancel** button is selected, after a user has started to use certain functionality in the application, the user should expect a confirmation message to be displayed:

- If "Yes" is selected, the user is returned to the OHRS home page or previous page.
- If "No" is selected, the user continues to work in the functional area.

People using Assistive Technology (AT) may have to use the **Tab** key after clicking **Cancel** to gain focus to the dialogue, then use the **Arrow** keys to read the text inside the "Cancel" dialogue. This "Cancel" dialogue can be seen on some of the following pages:

- Create Encounter
- Encounter Data Entry
- Create Report
- Patient Information
- Report Parameter
- Schedule Report
- Canceling a batch process

2.4.7   Ctrl + Down Arrow Keys

When an item is in focus, you can use the **Ctrl + Down Arrow** keys to expand drop-down lists.

2.4.8   Ctrl + Home Keys from OHRS

The **Ctrl**+ **Home** key combination returns you to the OHRS home page.

2.5   Section 508 Compliance when Entering Dates in OHRS

OHRS provides a popup "Calendar" dialogue for date selection for all Date fields. To access the "Calendar" dialogue, use the **Ctrl + Down Arrow** keys.

CAUTION: Currently, due to issues between JAWS and OHRS, date selection using the "Calendar" dialogue does not always respond as expected. Thus, the user can *manually* enter all dates in a Date text box in a *MM/DD/YYYY* format and *not* use the "Calendar" dialogue.

3 Role-Based Access

3.1 Understanding Role-Based Access

The level of access to data and functions in Clinical Information Support System (CISS)-Occupational Health Record-Keeping System (OHRS) varies depending on job function. Your System Administrator works with you to determine the most appropriate level of access for your job functions.

4 Electronic Signature

4.1 Working with the Electronic Signature

To ensure security and provide audit information, all Clinical Information Support System (CISS)-Occupational Health Record-Keeping System (OHRS) users with authority to document care *must* have an electronic signature code, or e-signature.

Your e-signature is a secondary level of authentication and carries the same legal responsibilities as your written signature. It works in addition to your password to identify you. You *must* enter your e-signature when you confirm the encounter data that you enter.

Once you create your e-signature, do *not* share it with anyone. For your protection, your e-signature is encrypted and unknown to anyone else, including computer programmers maintaining CISS-OHRS. If you forget your e-signature, it *must* be reset by a Veterans Health Information Systems and Technology Architecture (VistA) system administrator.

NOTE: VistA ESig user account setup is required for CISS-OHRS users to use their e-signature in the application. If you are experiencing an ESig-related error when signing an encounter, contact the Local Site Information Technology (IT) team member who verifies that your VistA ESig user account is set up with at least one of the following:

- The user *must* have the [XOBE ESIG USER] Broker option added to his or her secondary menu.

- The [XOBE ESIG USER] Broker option *must* be added to the Common Menu [XUCOMMAND] in Kernel.

  (For IT: this is the recommended option that enables all users on the system to have access to the ESig options, so that the Broker option need not be assigned specifically to individual users.)

4.2 Entering an Electronic Signature

ℹ **NOTE:** You *must* have the appropriate security privileges to access the Enter Electronic Signature or the option does *not* display.

To enter an electronic signature, perform the following procedure

1. Select the patient Encounter or Addendum you authored or an OH form linked to the patient Encounter.

    ℹ **NOTE**: The selected patient encounter, addendum, or OH form *must* have a status of **Open**.

2. Click **Sign**.

3. Enter your VistA **Access** and **Verify** codes.

Figure 9. OHRS—VistA Sign-in Page

4. Enter your electronic signature.

Figure 10. OHRS—Electronic Signature Page

5. Click **Sign**.
6. Click **OK**.

4.3 *Entering an Electronic Co-Signature*

NOTE: You *must* have the appropriate security privileges to access the Enter Electronic Co-Signature or the option does *not* display.

To enter an electronic co-signature, perform the following procedure:

1. Choose to electronically co-sign a patient encounter, addendum, or OH form.

    NOTE: Patient Encounter, addendum, or OH form is flagged that a co-signature is required and status is Cosign.

2. Enter electronic co-signature information.
3. Select the VistA Login and follow the steps in the "Entering an Electronic Signature" section.

5 Working with a User Profile

5.1 *Managing My Profile*

You can create, change, or view your user profile, depending on your security clearances. **My Profile** is used to view, create, or change your e-Signature code.

NOTE: You *must* have the appropriate security privileges to access **My Profile** or the option does *not* display.

To manage your user profile, perform the following procedure:

1. From the **OHRS Menu**, select **My Profile**.

2. On the screen that displays, "enter your VistA e-Signature Codes," select the **VistA Login** button. If appropriate, you see a page where you can make some changes.

3. After you have created or changed your VistA e-Signature codes, click **Submit** to submit your user profile. It is validated and stored at the VistA site.

NOTE: The steps to create, view, or update a user profile are the same.

6   Search Select Patient

6.1   Working with OH (Occupational Health) Patients

OHRS supports various roles in the system. For example, a user can be a:

- Supervisor
- OH or non-OH RN
- OH or non-OH RN student
- OH or non-OH provider
- OH or non-OH clerk
- System Administrator at VistA lab, local, or regional level

The role the person has in OHRS determines what functionality they can perform within OHRS.

For example, an OH patient in the OHRS system can be assigned any of the following statuses within OHRS:

- Applicant
- Contractor
- Employee
- Medical student
- Non-paid employee
- Nursing student
- Other Federal Agency employee
- Volunteer

OHRS stores data on patient encounters, and encounters are defined as any interaction between a person who is a provider and a person who is a patient. The encounter records the following:

- Encounter type
- Purpose
- Status
- Provider
- Other specific clinical data obtained during the patient's visit with the provider

It also allows you, with appropriate permission, to add an addendum to the encounter if needed. OHRS provides scheduled and unscheduled reports on items, such as vaccination rates and immunity status.

These reports can help management identify the following:

- Who is due for vaccination

- Who has received a vaccination

- Who has declined a vaccination

OHRS allows you, with appropriate permission, to electronically sign or co-sign a patient encounter. It shares Electronic Signature Code information with the VistA application that resides within the same duty station. However, this interface does not share patient-specific data. Instead, it allows OHRS users who have signature permission to maintain one signature code that they use in both OHRS and CPRS. OHRS allows you to update your signature code, and then it shares this with the VistA system at your duty station.

6.2   Searching for or Selecting a Patient

NOTE: You *must* have the appropriate security privileges to access the Search/Select Patient function or the option does *not* display.

When searching for a patient, you can see information only for patients that you have a need to know about, based on your role. Typically, you are restricted to seeing patient information only for those patients assigned to the duty stations that have been assigned to your User ID.

The Search/Select Patient basic flow begins when you choose to search for an existing OH patient and ends when you confirm the selection of the OH patient.

To search for or select a patient, perform the following procedure:

1. Select **Menu** tab on the left side of the page.

2. Select **Patient**.

3. Select **Search Select Patient**.

4. Enter any of the three search criteria options.

5. Click **Search**.

6. The search results display a list of patients at that duty station.

7. Highlight a patient from the list.

8. Click **Select**.

TIP: You can also do a "quick search" on a patient from the **Search** option on the OHRS main page:

1. Type the patient's last name and click **Search**.

2. The search results display a list of patients at that duty station.

3. Highlight the user you want and click **Select**.

NOTE: This list can consist of patient matches to patient entries in the Personal and Accounting Integrated Data (PAID) and/or Voluntary Service System (VSS). Assuming you are working with the patient at the time you are looking up their record, you need to verify that you have the correct patient's record selected. A confirmation page displays asking you to confirm if the patient is the correct one.

This confirmation page provides the user with the selected demographic information to ensure the correct patient is selected. You can also associate the patient with another duty station on this page. If this is not the correct patient, the user can cancel the function and return to the Search screen.

6.3 Creating a New Patient

NOTE: You *must* have the appropriate permission to access the **Create New Patient** function or the option does *not* display.

To create a new patient, perform the following procedure:

1. Select **Create New Patient**.

2. Enter the new patient information.

3. Click **Add**.

4. On the confirmation page that displays, click **OK** to confirm and add the patient or **Cancel** to ignore the new patient addition.

When you are adding a new patient, if either of the following data matches a record that already exists within OHRS from PAID or VSS, you are given the option to select the existing record within OHRS or cancel out of the new creation:

- Social Security

OR

- Last Name, First Name, Date of Birth *AND* Gender.

No duplicate records are allowed to be created. If there are data integrity issues, the OHRS end-user *must* work through the VA Human Resources specialist or application administrator to correct them.

6.4   Special Considerations When Creating a New Patient

The following is helpful information to know when creating a new patient:

- Complete Address and Social Security Number

- Select Veterans Affairs Administration Field

6.4.1   Complete Address and Social Security Number

If you enter the patient's full address, you do not need to enter their Social Security Number (SSN); however, if you leave the address fields blank, you are required to enter the SSN. Neither of these fields is marked as required, but there are instructions on the page and you receive an appropriate error message if you attempt to add the patient without either a full address or an SSN.

6.4.2   Select Veterans Affairs Administration Field

This drop-down field's purpose is to capture the patient's Veterans Affairs Administration affiliation. It is a required field, dependent upon selected patient type (i.e., it is either selectable or not, depending on the patient type you select). For example, if your patient is an Employee, you *must* select one of the choices in the drop-down list. If your patient is an Other Federal Agency Employee or a Volunteer, you *cannot* edit the field and its default is "No Affiliation." For all other patient types, you can select one of the choices in the field.

7 Working with Encounters

7.1 Understanding Patient Encounter Records

The Patient Record page, which is displayed after you have entered a new patient or if you select an existing patient, is divided into two basic sections.

7.1.1 Displaying the Main Patient Record Page Sections

The top area of the page is the very basic patient information:

- Name
- Last four digits of Social Security Number (SSN)
- Date of Birth
- Gender
- Patient Type
- Work Status,
- City and State

Figure 11. OHRS—Patient Information on Main Page

The middle, or tab, area of the page displays five tabs:

- Cover Sheet
- Encounters
- Notifications
- Patient Information
- WorkAbility Information.

The example in Figure 12 is specific to the selected test patient; not all patients have the same information displayed. The view you see is determined by your role, which also affects what you see on the page and why it may vary.

Figure 12. OHRS—Tab and Main Content Areas
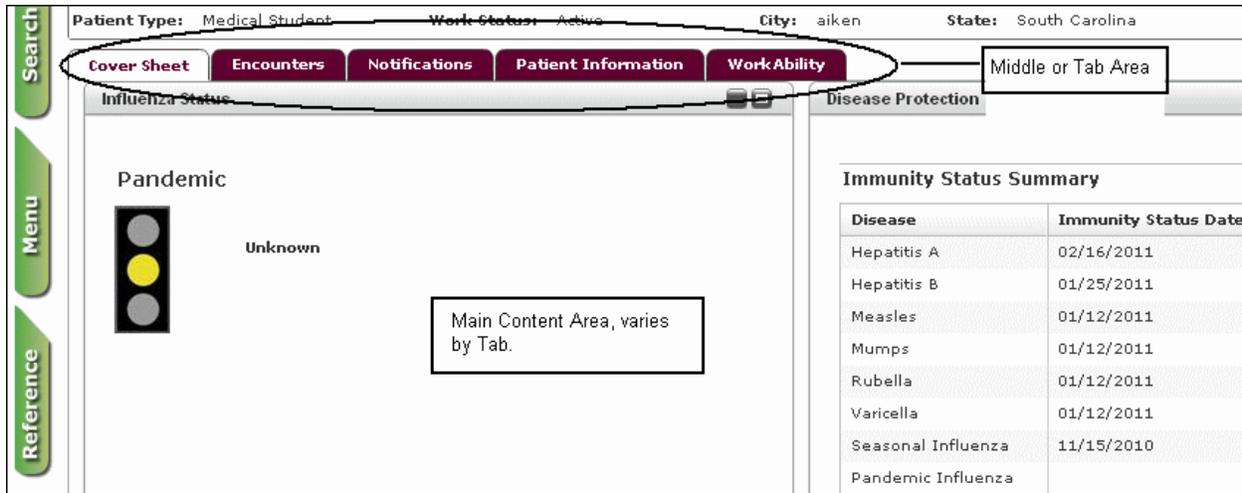
The largest area on the page is the main content area, which varies according to the tab selected.

7.1.2   Displaying Patient Records on the Encounters Tab

The **Encounters** tab displays encounters that you have created for the selected patient or those that have been Closed (Signed or set as needing a Co-signature). As an occupational health provider, you can view your own encounters with the status of Open, Closed, or Co-sign. All encounters are displayed on the encounter list for the selected station. You *cannot* view the details of encounters created by other providers if the encounter status is Open or Co-signed, or if the encounter belongs to another station.

Encounter access is based on your user role. If your role allows you to access encounters, you will see them.

7.1.3   Displaying Patient Encounters (OH Provider View)

From this page, you can:

- Create a new encounter by clicking **Create**.

- You can create General Health or Medical Surveillance Encounters.

REF: For more information, see the "Creating a Patient Encounter" section.

It is also helpful to understand some specific layout properties of CISS-OHRS, which are described in the "Working with Specific Entry Items When Creating Encounters" section.

To search for another encounter, perform the following procedure:

1. Type free text words in the **quick search** box at the top of the content area and click **Search**.

   You will see a list of encounters that match the keywords entered. For example, you can type in keywords, such as Medical Surveillance or Co-sign, and the list will be filtered for those values.

2. Click **Reset** to clear the filter and view the entire list.

You can control what encounters are displayed by using the following drop-down lists, one at a time:

1. Select **Type**—To filter the encounter list by type, such as Immunization Authorization or Pandemic Influenza, click the **Type** drop-down option and select a type.

2. Select **Provider**—To filter the list by provider name, click the **Provider** drop-down option and select a provider.

3. Select **Status**—To filter the list by encounter status, click the **Status** drop-down option and select Closed, Co-sign, or Open.

   NOTE: Only the statuses that are available are displayed in the drop-down list.

4. Reset the search list and current view by clicking **Reset**.

View the existing encounters with the Encounters Chart view by clicking the **Chart** button. If you click the encounters plotted on the chart, you can view the encounters, but your ability to view follows the same rules defined in the list view.

   REF: For information on how to work with the Encounter Chart view, see the "Working with the Encounters Chart" section.

7.1.4   Displaying Selected Encounters (OH Provider View)

After you have selected an encounter from the list, the buttons that display, and the subsequent actions you can take, are dependent on the status of the encounter. For example:

- Create
- View
- Co-sign
- Addendums
- Notifications
- Print

You can view only your patient records that have a status of Open, Closed, or Co-sign, and encounters that were assigned to you by another provider for co-signature.

Figure 13 is an encounter that has been left open for co-signature:

REF: For more information on co-signatures, see the "Entering an Electronic Co-Signature" section.

Figure 13. OHRS—Encounters tab: An Open Encounter (List view)

7.1.4.1   Create

The **Create** button allows you to create a new encounter.

REF: For details, see the "Creating a Patient Encounter" section.

7.1.4.2   View

The **View** button allows you to view read-only details of the highlighted encounter.

REF: For more information, see the "Creating a Patient Encounter" section.

You can view details of Closed encounters only. The restrictions as to which encounters you are allowed to see (e.g., at your station) still apply.

7.1.4.3   Co-sign

The **Co-sign** button is available only if you have requested a co-signature or are the person who needs to co-sign the encounter. The designated co-signer *must* co-sign the encounter before it can be closed. The co-signer has Read-only access to the encounter.

7.1.4.4   Addendums

The **Addendum** button allows you to create an addendum for the patient encounter. If the co-signer adds an addendum *before* they co-sign the encounter, they need to co-sign the original encounter *before* they can sign the addendum.

REF: For information on creating addendums, see the "Creating an Addendum for a Patient Encounter" section.

7.1.4.5   Notifications

The **Notifications** button displays all notifications associated with the selected encounter.

NOTE: From here, you can also create additional notifications.

7.1.4.6   Print

The **Print** button allows you to print a PDF version of an encounter.

REF: For details, see the "Creating a Patient Encounter " section.

7.1.5   Displaying the Risk Profile

The Risk Profile is located on the **Patient Information** tab. It displays the risk profile for a patient, as every OHRS patient *must* have a Risk Profile created. The Risk Profile indicates how often a patient *must* be evaluated for the designated risk.

7.1.6   Viewing Disease Immunity

As an OHRS user, you can see a summary of a patient's immunity status on the patient cover sheet so that you can quickly get a "snapshot" of their immunization record.

You can see the "Disease Immunity Summary" table from underneath the "Encounter Distribution" graphic on the patient's cover sheet.

The "Disease Immunity Summary" always contains the following information:

- Disease

- Immunity Status Date

- Immunity Status

NOTE: The "Disease Immunity Summary" table only contains a patient's latest immunity information. It does *not* contain a patient's immunity history.

7.1.7   Displaying the Work Profile

A patient's Work Profile is initially created when the patient's record is created or if the patient data comes from the Personnel and Accounting Integrated Data System (PAID) or Voluntary Service System (VSS) systems. The Work Profile shows information about the following:

- Where the patient works

- Job Code

- Job Title

- Supervisor information

The Work Profile can be updated.

REF: For more information, see the "Creating and Updating the Work Profile" section.

7.1.8 Displaying the Demographic Information

A patient's demographic information is initially created when the patient's record is created or if the patient data comes from the PAID, VSS, or Other Federal Agency (OFA) systems. The demographic information includes:

- Name
- Address
- Phone
- Email
- Emergency contact information for the patient.

The demographic information can be updated.

ℹ️   **REF:** For more information, see the "Updating the Demographic Information" section.

7.1.9 Displaying the Patient Cover Sheet Pods

The Patient Cover Sheet pods are clickable pieces of content on the **Cover Sheet** tab that allow you to quickly view important high-level patient information.

- You can minimize and maximize any of the pods. When you minimize pods, the page automatically readjusts the remaining pods to fit into the cover sheet space. Minimized Pods are relocated to the bottom left of the page.
- You can drag and drop the Pods to change the order in which they display.

Once you modify the view of the pods and log out, the system retains your settings when you log back onto the system.

Figure 14. OHRS—Patient Coversheet Pods

The Patient coversheet includes six Pods. Table 2 lists a description of each pod.

Table 2: OHRS—Cover Sheet Pods

Pod	Description
Influenza Status	Displays a stop light warning view of the Influenza Status. For Pandemic and Seasonal, a green, yellow, or red light is displayed.
Disease Protection	Displays the following: • Immunity Status Summary • Disease • Immunity Status Date • Immunity Status This Pod allows you to sort in ascending or descending order by field. To do this, click on a particular field heading.
Full Shot Record	You can view this Pod as either a plot or a line chart. Each gold colored diamond represents a particular vaccine and vaccination status date for a patient.
Visited Stations	Displays the Station Number and Station Name. This Pod allows you to sort in ascending or descending order by field. To do this, click on a particular field heading.
Encounter Distribution	Provides a pie chart view of the following encounter categories or a given patient: • General Health • Medical Surveillance • Respirator Click on a particular section of the chart to select the pie piece and emphasize a category.
Respirator Fit Test Summary	Displays the following: • Type of Respirator • Respirator Manufacturer • Manufacturer's Model Number • Face Piece Type • Respirator Size • Next Fit Test Date • Respirator Fit Test Station This Pod allows you to sort in ascending or descending order by field. To do this, click on a particular field heading.

Click on the tabs at the bottom of the coversheet to display a pod that has been minimized.

Figure 15. OHRS—Minimized Coversheet Pods

If you maximize a pod, the entire page expands to display the pod's content.

7.1.10 Printing Cumulative Vaccination Records

An OHRS user who has permission can print the vaccination record for a patient. The vaccination record contains all vaccinations recorded on all Closed encounters for the vaccination statuses of "Vaccination Complete" and "Vaccination In Progress" for the patient in OHRS.

To print a cumulative vaccination record, perform the following procedure:

1. Search for a patient to display the patient's cover sheet.

2. Click the **Print Cumulative Vaccination Record** button at the top right of the page to display the record.

3. Click **File**.

4. Click **Print** to print the record.

7.1.11 Viewing Respirator Fit Test Summary Information

You can view cumulative information about a patient's Respirator Fit Test (RFT) status in the "Respirator Fit Test Summary" table, which is located in the "Respirator Fit Test Summary" pod on the cover sheet.

The RFT Summary table contains only the latest information about fit tests that passed on different types of respirators. It does *not* contain information about fit tests that failed. For example:

- If two RFT encounters have the same type of respirator and one failed the Fit Test, only the "passed" encounter information is included. The "passed" encounter is included even if it was done before the "failed" encounter.

- If two RFT encounters have different types of respirators and both passed the Fit Test, information from both encounters is included in the RFT Summary table.

To view the Respirator Fit Test Summary information, perform the following procedure:

1. Select a patient.

2. Use the **Filter** drop-down list to narrow your results to **Respirator Fit Test** encounters.

3. Click the patient's **Cover Sheet** tab.

4. Select the "Respirator Fit Test Summary" pod.

Figure 16. OHRS—Respirator Fit Test (RFT) Summary pod information

Cover Sheet	Encounters	Notifications	Patient Information	Work Ability				

Respirator Fit Test Summary

Respirator Fit Test Summary

Type of Respirator	Respirator Manufacturer	Manufacturer's Model Number	Face Piece Type	Respirator Size	Next Fit Test Date	Respirator Fit Test Status
Air filtering respirator	3M	123456	Half Face Mask - Filtering Face Piece	Extra-Small (XS)	10/01/2010	Pass

7.2 Understanding Encounters

Encounters are the heart of OHRS, as they drive patient data gathering. Some data types gathered include:

- Encounter Type

- Purpose

- Status

- Provider

Encounters are used to incur reports, alerts, and other functionality within the system.

7.3 Creating a Patient Encounter

ℹ **NOTE:** You *must* have the appropriate security privileges to access the Manage OH Encounter functions or the option does *not* display.

To create a patient encounter, perform the following procedure:

1. Select a patient from either **Search Select Patient** (see Section 6.2) or **Create New Patient** (See Section 6.3).

2. With a patient record displayed, click the **Encounters** tab.

3. Click **Create**.

4. Enter the encounter information; the information entered varies depending on the kind of encounter you are creating.

5. When you are finished entering all of the information, sign the encounter.

ℹ **REF:** For more information on signing an encounter, see the "Working with the Electronic Signature" section.

7.4 Viewing and Printing a Patient Encounter

If you have the appropriate permission, you can view and print the encounters set up for a patient. You can search and sort the list of patient encounters.

To view and print a patient encounter, perform the following procedure:

1. Select a patient record from **Search Select Patient** (see Section 6.2)

2. Click the **Encounters** tab.

   If encounters have been entered for the patient, you will see a list of one or more encounters.

3. Highlight the encounter you want to read.

4. Select **View**. A detailed version of the encounter is displayed in read-only format.

5. If you want to print the encounter, select **Print**. A version of the encounter is displayed as an Adobe® PDF document and you can print it.

7.5   Working with the Encounters Chart

You can work with encounters via the Chart view:

1. Highlight a chart item (as shown in <u>Figure 13</u>) and you see the same buttons at the bottom that you would see on the List view.

2. Click and hold the mouse on the large chart (the chart displaying gray and white bars) and pan (move mouse left or right) to change the timeline.

   OR

   Click on one of the small charts in the lower section (outside the active region) and a slider displays.

3. Pull the slider with the mouse and the timeline changes. The larger chart adjusts based on the changes from the smaller charts in the lower section.

NOTE: The chart items in the active region defaults to the most recent five encounters, and you *must* have at least two encounters for the chart icon to display.

7.6   Deleting an Encounter or Addendum

An encounter or addendum can be deleted, but certain rules apply:

- An encounter or addendum in an Open status can be deleted by its creator.

- An encounter or addendum in a Closed or Co-sign status can be deleted by a Local, Regional, or National Administrator. However, if the administrator is the creator of the Closed or Co-sign encounter or addendum, they *cannot* delete it themselves and *must* have another administrator perform the delete action.

To delete an Open encounter or Addendum, perform the following procedure:

1. Select the desired encounter or addendum from the appropriate list in the **Encounters** tab.
2. Click **Delete**.
3. Click **Yes** in the confirmation popup dialogue.
4. The system deletes the encounter or addendum from the list.

To delete a Closed or Co-sign encounter or addendum, perform the following procedure:

1. Select the desired encounter or addendum from the appropriate list in the **Encounters** tab.

2. Click **Delete**.

3. Click **Yes** in the confirmation popup dialogue.

4. The system does the following:

   - Inserts "Erroneous Note" in the "Type" and "Purpose" columns for the encounter or addendum on the list.

   - Changes the Encounter or Addendum status to **Deleted**.

7.7   Changing a Designated Co-Signer for Encounters

If you are an OHRS Local, Regional, National Administrator, or the author of an encounter, you can change the designated co-signer for an encounter.

To change a co-signer, perform the following procedure:

1. Select a patient and navigate to the **Encounter List**.

2. Select the encounter you want to change.

NOTE: Make sure that the Status selected is "Co-sign". If you have the correct permissions, the **Change Co-Signer** button displays.

Figure 17. OHRS—Encounters tab: Selecting an encounter entry

3. Click **Change Co-signer** to display the popup dialogue:

Figure 18. OHRS—Change Co-Signer popup dialogue: Changing the co-signer for an encounter

4. Select a new co-signer from the drop-down list, and then click **Submit**.

5. The changes are confirmed and the system executes the alert notification process. The new designated co-signer should now be able to sign the encounter.

7.8 Changing a Designated Co-Signer for Addendums

If you are an OHRS Local, Regional, or National Administrator or the author of an addendum, you can change the designated co-signer on an addendum.

To change a co-signer, perform the following procedure:

1. Select a patient and navigate to the E**ncounter List**.

2. Select the encounter you would like to change.

3. Click **Addendums** to view the Addendum List.

> **ⓘ** NOTE: Make sure that the status is "Co-sign." If you have the correct permissions, the **Addendums** button displays.

4. Select the addendum you would like to change.

Figure 19. OHRS—Encounters tab: Selecting an addendum entry

Patient Type: Employee		Work Status: Active	City:

Search | Menu | Reference

| Cover Sheet | Encounters | Notifications | Patient Information | Work Ability |

Delete **Cancel** **Change Co-signer**

Encounter Summary

Type	Purpose	Date/Time	Status	Provider
Medical Surveillance	Medical Surveillance	03/02/2011 10:49 EST	Closed	CISSuserA, One

Addendums List

Date/Time ▼	Description
03/02/2011 11:04 EST	adding an addendum

5. Click **Change Co-signer** to display the popup dialogue:

Figure 20. OHRS—Change Co-Signer popup dialogue: Changing the co-signer for an addendum

6. Select a new co-signer from the drop-down list and click **Submit**.

> **NOTE**: The encounter *must* be signed *before* the addendum is signed.

7. The changes are confirmed.

8. The system then executes the alert notification process.

9. The new designated co-signer should now be able to sign the encounter.

7.8.1   Working with Specific Entry Items When Creating Encounters

There are specific tabs within the **Encounter** tab itself that require data entry when you are creating a new encounter.

NOTE: The tabs listed below with parentheses indicate that they are present with particular types of encounters only, currently Pandemic Influenza.

The tabs are named:

- **S**ubjective
- **O**bjective
- **A**ssessment
- **P**lan*****, which has two additional tabs:
    - (Treatment) Plan
    - (WorkAbility)
- (Follow-up Plan)
- Plan Comment
- **E**ncounter Codes*****, which also has two additional tabs:
    - Diagnostic Codes*****
    - Procedure Codes*****

This group of tabs is referred to by the **SOAPE** acronym. Those items (tabs) that have an asterisk after them contain required fields.

REF: You can see examples of the SOAPE tabs for a various encounters in the following sections:

- "Creating a Medical Surveillance Encounter"
- "Creating a Vaccination Encounter (General Health)"
- "Creating a Pandemic Influenza Encounter"

NOTE: The first tab changes (and is not defined as SOAPE), depending on which encounter type you are entering. The first tab gives you relevant information, for example:

- Vaccination history for vaccination encounters
- Respirator information for Medical Surveillance encounters
- Evaluation method for Pandemic Influenza encounters

7.8.1.1 Encounter Codes Tab

The Encounter Codes tab is broken down into two additional sub-tabs:

- Diagnosis Codes

- Procedure Codes

The Diagnosis Codes tab and Procedure Codes tab are similar; they both work the same way, with the **Search** button below the list of codes. You can search within the box to find the correct codes:

1. Enter a partial or whole name or number.

2. Click the **Search** button.

3. After the appropriate code is displayed in the Search box, select it and click **Select**.

REF: For information on how to enter data in these pages, see the "Creating a Vaccination Encounter (General Health)" section.

7.8.2   Creating a Medical Surveillance Encounter

One of the encounter types you can create is the Medical Surveillance encounter.

ℹ   **NOTE:** You *must* have the appropriate security privileges to access the Medical Surveillance encounter functions or the option does *not* display.

To create a Medical Surveillance encounter, perform the following procedure:

1.   Select a patient from either **Search Select Patient** (see Section 6.2) or **Create New Patient** (See Section 6.3).

ℹ   **NOTE:** You *must* have created a patient encounter using Manage OH Encounter.

2.   With a patient selected, click **Create Encounter**.

Figure 21. OHRS—Encounters tab: Creating an encounter

3.   Select **Medical Surveillance** in the Category drop-down list.

4.   The **Type** drop-down list defaults to "Medical Surveillance" and is disabled, because there is no other type of Medical Surveillance encounter at this time.

5.   Enter a purpose.

6.   Click **Submit**.

7.   In the "Medical Surveillance Encounter" dialogue, click **Submit**.

ℹ   **NOTE:** At the current time, the system defaults the selection to "Respirator" on the right side box on this screen.

8. Navigate to all of the **SOAPE** tabs and fill in all required information.

9. Under **Encounter Codes**, select the **Diagnosis Code** and **Procedure Codes** tabs and fill in required, appropriate information.

10. Click **Submit**.

NOTE: From here, you continue with the encounter, signing and/or getting it co-signed; thus, closing the encounter.

REF: For more information, see the "Entering an Electronic Signature" and "Entering Electronic Co-Signature" sections.

7.8.3 Working with Assessments

Within the Medical Surveillance encounter, there is an **Assessment** tab where you can collect the following patient information regarding:

- Medical Opinion

- Further Evaluation Needed

- Medically Cleared

- Medically Cleared with Restrictions

- Medically Not Cleared

If the Medical Opinion is specified as **Medically Cleared with Restrictions**, then you are required to capture the following information:

- Reason for Restriction.

- If you select **Other**, you *must* enter comments explaining why you chose the **Other** option.

7.8.4   Respirator Fit Test Encounter Editing Considerations

The Safety Officer/Industrial Hygienist and/or a Respirator Fit Tester are the only OHRS users who can edit these encounters. Only the owner of the data captured in the Respirator Fit Test encounter can edit their own data. For instance, if the Trainer is a different person than the actual Fit Tester, the Trainer can update only the "Training Date Completed" and the "Name of the Person Conducting the Respirator Training" fields. Conversely, the author of the Respirator Fit Test Encounter will *not* be able to edit/change either of those fields.

Also, only the author (i.e., the Safety Officer/Industrial Hygienist or Respirator Fit Tester), can sign and close the encounter.

The patient *must* first be cleared to wear a respirator. This is done at the time a member of the OHRS medical staff creates and signs a Medical Surveillance encounter to clear the patient.

REF: For more information, see the "Creating a Medical Surveillance Encounter" section.

If the patient is not cleared to wear a respirator, you receive an error message when you begin to create the encounter and you *cannot* continue. Only OHRS OH Providers and others with the appropriate permission can enter a Medical Surveillance encounter.

NOTE: The Medical Surveillance encounter *must* be closed before the patient is considered cleared and before a Respirator Fit Test encounter can be created.

7.8.5   Entering a Respirator Fit Test and Training Encounter

To enter a Respirator Fit Test and Training encounter, perform the following procedure:

1. Select a patient.

2. Click the **Encounter** tab.

3. The Category of Respirator Fit and Type of Respirator Fit Test are already filled in for you. Click **Submit**.

4. Review system messages:

    - If the patient is not cleared or if the patient needs further evaluation, you receive a message that states the patient has not been medically cleared to wear a respirator.

    - If the patient has never had a Medical Surveillance Respirator examination encounter done you receive the following message:

Figure 22. OHRS—Cancel Create Encounter Message
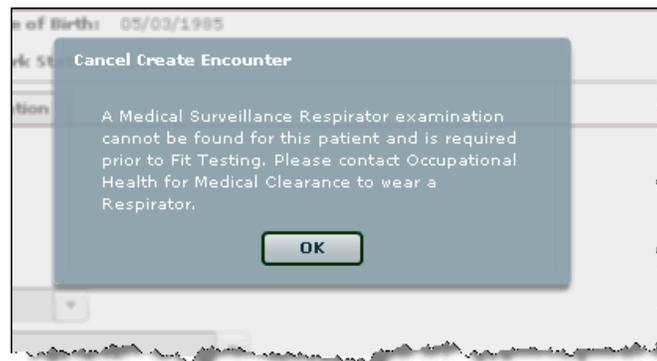
5. If the patient is medically cleared to wear a respirator, the SOAPE dialogue displays and there is an additional tab called the **Respirator Fit Test History** tab. It displays information about a patient that may be medically cleared with restrictions, as well as a history of all other types of respirator fit test encounters.

6. Click the **Plan** tab.

7. Enter the required fields:

    - Name of the person conducting the fit test,

    - Next fit test date

    - Name of the Facility Respiratory Protection Coordinator.

      There are search boxes you can use to search for names.

8. Click the **Encounter Codes** tab.

9. Click the **Procedure Codes** tab, select the **Diagnosis Code**.

10. Select a code or enter keywords in the **Search** box.

11. When you have the correct code highlighted, click **Select**.

12. Click the **Procedure Codes** tab.

13. Select a code or enter keywords in the **Search** box.

14. When you have the correct code highlighted, click **Select**.

15. Click **Submit**.

    At the end of each respirator fit test data entry, you can complete another fit test if you wish. Just answer **YES** to the question that is displayed. This enables you to either loop back to the beginning of the "Plan" section or to finalize the Fit Test encounter.

16. To complete another fit test, answer the questions for that particular respirator.

17. When you are ready to close the encounter, click **No** to the question that is displayed at the end of the fit test data entry, then click **Sign**.

> **ⓘ** **REF:** Follow the instructions in the "Entering an Electronic Signature" section.

> **ⓘ** **NOTE:** You are able to see the results of other respirators if the patient has been cleared to wear them. This displays in the **Plan** tab. As a Respirator Fit Test is completed for each respirator type, a grid displays at the top of the **Plan** tab that reflects the results of each Respirator Fit and mirrors the same column headings displayed on the **Respirator Fit Test History** tab.

7.8.6   Creating a Vaccination Encounter (General Health)

> **ⓘ** **NOTE:** You *must* have the appropriate security privileges to access the Create Vaccination Encounter functions or the option does *not* display.

To create a Vaccination encounter, perform the following procedure:

1. Select a patient from either **Search Select Patient** (see Section 6.2) or **Create New Patient** (See Section 6.3).

   > **ⓘ** **NOTE**: You *must* have created a patient encounter using Manage OH Encounter.

2. With a patient selected, click **Create Encounter**.

3. From the Category drop-down, select **General Health**.

4. From the Type drop-down, select **Vaccination**.

5. Enter a purpose for the Vaccination encounter in the Purpose field.

6. Click **Submit**.

Figure 23. OHRS—Encounter tab: Available Vaccines

7. The list of vaccines displays. Select one or more of the vaccinations you intend to give the patient. You can use the **Control** key to select up to five vaccines, as long as they are compatible with each other (use your knowledge of the vaccines).

8. Click **Add**.

9. Click **Submit**. The Subjective, Objective, Assessment, Plan, and Encounter Codes (SOAPE) page displays.

> **NOTE**: The **History** tab displays the Vaccination record and the Disease Immunity record. Note that the display here may differ from what you see in Reports (see the "Understanding Reports" section).

10. Click the **Plan** tab and enter the required information (marked with an asterisk). Also, enter any Plan comments if necessary under the **Plan Comments** sub-tab. This is *not* required.

> **NOTE:** As shown in Figure 24, often, additional fields display depending on what you select. For example, the Hepatitis A and B Combination screen contains fields for Dose Received.

Figure 24. OHRS—Encounter tab: Plan tab

11. Click the **Encounter Codes** tab at the bottom of the page.

12. Under **Encounter Codes**, select the **Diagnosis Code**.

13. Select a code or enter keywords in the **Search** box. Choose a code for each vaccine you have entered.

14. When you have the correct code highlighted, click **Select**. If you have more than one vaccine, you *must* select one diagnostic code at a time.

15. Click the **Procedure Codes** tab.

16. Select a code or enter keywords in the **Search** box. Choose a code for each vaccine you have entered.

17. When you have the correct code highlighted, click **Select**. If you have more than one vaccine, you *must* select one code at a time.

18. Click **Submit** and sign the encounter.

NOTE: On any vaccination encounter, you see a question as to whether or not the patient has received the vaccine previously.

If the patient has received the vaccination previously, here is what you should do:

1. Click the **Yes** radio button on the **Received Previously** question.

2. For a one-dose vaccine, fill in the **Date Received Previously** field. For a two- or more-dose vaccine (indicated by the appropriate number of "Dose" check boxes), fill in the **Date Received Previously** for each dose received.

3. Continue to fill out the remaining questions and complete the encounter.

7.8.7   Creating a Hepatitis A Vaccination Encounter

You can document patient Hepatitis A Vaccination details by accessing the **Hepatitis A vaccine** option from the available list of vaccines from the **Encounters** tab once you create an encounter.

1. Once you are in the **Plan** section, be sure to:

   - Enter all required fields for the vaccine.

   - Check one or more follow-up Plan options.

   - Enter all required fields for both the **Diagnosis** and **Procedure** codes (each under the **Encounter Codes** tab).

   - You can also enter any comments on the **Subjective**, **Objective**, and **Assessment** tabs.

2. If you click **Yes** to indicate that the Hepatitis A vaccine has been received previously, you need to indicate the following:

   - Date the vaccine was received.

   - Date each dose was received.

Figure 25. OHRS—Plan tab: Sample Hepatitis A - Date Dose Received fields

3. Proceed to the "Medically Contraindicated" question. If the Hepatitis A vaccine is Medically Contraindicated, you are taken directly to the follow-up plan information as detailed in the "Creating a Vaccination Encounter" section.

Figure 26. OHRS—Plan tab: Sample Hepatitis A Vaccine – Not Medically Contraindicated fields

4. If the Hepatitis A vaccine is not Medically Contraindicated, complete all remaining questions.

5. Proceed to the follow-up plan.

6. After you complete all required fields, sign the Encounter.

7. You can select the completed Encounter and view the Immunity and Vaccination status in the "History" section of the Encounter.

8. You can also select the Encounter and click **View** to see the patient information.

9. You can click **Print** to view the patient information in a printable PDF format.

7.8.8   Understanding Dynamic Doses in Vaccination Encounters

Dynamic Doses occur when the number of doses a patient needs to receive in a vaccination encounter has changed. For example, in the pandemic influenza vaccination encounter, the required number of doses was formerly two, but now the dose is one. When you go to the "Plan" section of an encounter, the Dose # drop-down list displays the correct number of doses in a vaccine. In one-dose vaccination encounters, you will not see the Dose # drop-down list.

Dynamic Doses can also occur when different users require a different number of doses to be considered vaccinated. One patient may need a one-dose vaccine while another patient may need a two-dose vaccine. In this situation, the number of doses in a vaccine is variable. If a vaccination encounter has a variable number of doses, there is a "Required Number of Vaccine Doses" drop-down list in the "Plan" section.

The drop-down list shows the maximum number of doses in the vaccine and asks you to tell how many doses a patient needs. For example, if the "Required Number of Vaccine Doses" lists up to three doses but your patient just needs one dose, you would answer "**1**."

7.8.9   Creating a Pandemic Influenza Encounter

The Pandemic Influenza (Pan Flu) encounter is used to document screening and treatment for pandemic influenza. It is to be used in the event of an outbreak to track exposures, determine who is at risk, and in what capacity they may work.

The Vaccination Encounter is used to document vaccination against pandemic influenza. OHRS has the ability to report the vaccination and immunity status of employees and others, as well as their ability to work.

NOTE: You *must* have the appropriate permission to access the Generate Pandemic Influenza Template functions or the option does *not* display.

To create a Pandemic Influenza encounter, perform the following procedure:

1. Select a patient from either **Search Select Patient** (see Section 6.2) or **Create New Patient** (See Section 6.3).

2. Access the **Encounter** tab to create this encounter.

3. Select the **General Health** category, and then the **Pandemic Influenza** encounter type.

4. After you have submitted the general encounter information, you see the **Evaluation** tab of the Pandemic Influenza encounter.

5. Select the **Evaluation Method**. The remainder of the questions asked is contingent upon the evaluation method you select.

6. Click the **Subjective** tab and enter all required information.

NOTE: The defaults for the symptoms are **No**. You can change these as needed.

7. Click the **Objective** tab and enter all required information.

8. Click the **Assessment** tab.

9. Enter the Pandemic Influenza health status.

10. Click the **Plan** tab.

11. Enter all required information under the **Treatment Plan**, **WorkAbility**, and **Follow-up** sub-tabs.

NOTE: The number of questions to answer changes on many of these tabs, depending on the answers selected.

12. Click the **Encounter Codes** tab.

13. Under "Encounter Codes," select the **Diagnosis Codes** tab.

14. Highlight the appropriate diagnosis code for the Pandemic Influenza from the **Search** box and click **Select**.

15. Select the **Procedure Codes** tab and fill in the required code.

16. Click **Submit**.

17. Check for errors:

   - If there are errors, you need to correct them *before* you can submit and save the encounter. They will be listed.

   - If there are no errors, you see a page that tells you the Pandemic Influenza Encounter was saved successfully, and you can do one of two or three things:

      a. Press a button link to go directly to the **Vaccination Encounter** page to create a Pandemic Influenza Vaccination encounter.

      b. Sign the Pandemic Influenza Encounter.

      c. Click **OK** to leave the Pandemic Influenza Encounter open.

18. The appearance of the link to go to the Vaccination page (Step **17a**, above) is dependent upon the answer to the Vaccination Administered question under the **Treatment Plan** sub-tab in Step **11**; it *must* be set **Yes**.

Figure 27. OHRS—Encounter tab: Sample Pandemic Influenza encounter

7.8.10 Creating an Adverse Reaction Encounter

The Adverse Reaction Encounter is used to document any adverse reactions a patient may have due to receiving a medication.

NOTE: You *must* have the appropriate permission to access the Create Adverse Reaction Encounter functions or the option does *not* display.

To create an Adverse Reaction encounter, perform the following procedure:

1. Select a patient from either **Search Select Patient** (see Section 6.2) or **Create New Patient** (See Section 6.3).

2. Click the **Encounter** tab.

3. Click **Create**.

4. From the **Category** drop-down list, select **General Health**.

5. From the **Type** drop-down list, select **Adverse Reaction**.

6. (optional) Enter a purpose for the Adverse Reaction encounter in the **Purpose** field.

7. Click **Submit**.

8. The **SOAPE** page displays ([Figure 28](#)). The first tab is **Evaluation Method**, *not* History; it is like the Pandemic Influenza Encounter in this way.

Figure 28. OHRS—Encounters tab: Creating an Adverse Reaction encounter: SOAPE page

9. Click the **Evaluation Method** tab and select the appropriate Evaluation Method from the drop-down list:

    - Clinic Visit

    - Telephone Consult (consultation)

10. Click the **Subjective** tab and check the appropriate radio buttons to describe the patient's symptoms.

    NOTE: If the patient is female, there is a mandatory question regarding pregnancy at the top of the page above the "Patient Complains of" section.

Every field that displays an asterisk is required. The default setting for the symptom descriptions is "**No**." If you answer "**Yes**," additional comment text fields display; however, comment text is *not* mandatory.

11. If you have selected the **Clinic Visit** evaluation method (Step 9), click the **Objective** tab.

   The **Objective** tab contains three sub-tabs:

   - **Vital Signs**
   - **Examination of Systems**
   - **Adverse Reaction**

   On the **Examination of Systems** sub-tab, you can collect physical attributes from your patient. If any value listed is set to "Abnormal," you are required describe the findings.

   Regardless of the type of Evaluation Method, enter the appropriate data in at least the mandatory fields under all displayed tabs.

12. Under the **Adverse Reaction** tab, the required fields are:

   - Adverse Onset Date
   - Illness at the time of Medication?
   - Pre-existing Physician diagnosed Allergy, Birth Defect, and Medical Condition?

   Also, note that you *must* add a medication that the person is having an adverse reaction to (or presumably you would not be entering an adverse reaction encounter at all). To add the medication:

   a. Click the appropriate **Add** button.

   b. On the next dialogue, choose your options.

   c. When searching for a medication, you *must* enter a minimum of **three characters** of a generic medication name to open the search list.

   d. You *must* answer **Yes** or **No** to the question that asks whether or not the patient has taken any other medications within four weeks of taking the first medication.

      If **Yes**, you *must* use the **Add** button to choose the medications (as many that have been taken).

Figure 29. OHRS—Encounters tab: Creating an Adverse Reaction encounter: Adding other medications

NOTE: The medication list contains vaccines as well as medications, as a vaccine is a medication.

13. Click the **Assessment** tab and select **Yes** under the applicable major reaction type you observed in the patient.

    - At least one value *must* be set to **Yes**.

    - If you choose **Other**, you *must* enter a comment.

14. Click the **Plan** tab. This tab has three sub-tabs:

    - **Treatment Plan**

    - **WorkAbility** (required)

    - **Follow-up Plan** (required)

    Enter the required information in each.

15. Click the **Encounter Codes** tab. This tab has two sub-tabs:

    - **Diagnosis Codes**

    - **Procedure Codes**

    Enter the required information in each.

16. After you have entered all the required fields, click **Submit**.

    If there are any problems with the encounter, you receive a message and an opportunity to re-enter the data.

17. To close the encounter, you *must* sign it and (if required) set it for co-signature.

REF: For more information on electronic signatures, see the "Working with the Electronic Signature" topic.

7.8.11 Using the Quick Load Vaccination Function

The Quick Load Vaccination option allows you to enter multiple encounters quickly during the time you are vaccinating several people at a time. This way records are kept for all of the patients whom you vaccinate.

To use the Quick Load Vaccination function, perform the following procedure:

1. Select **Patient** from the **Menu** tab on the left side of the page.

2. Select **Quick Load Vaccination**.

NOTE: The "Administration Date" field defaults to the current date and the "Purpose" field defaults to "Quick Load Vaccination." You can accept the defaults or change them.

3. Select either the Pandemic or Seasonal Influenza vaccine from the **Vaccine** drop-down list.

4. Click **Submit**. The **SOAPE** page is displayed, with the **Plan** tab open.

5. Enter the required fields.

> **NOTE:** You are *not* allowed to enter information in some fields, because the information is not relevant to a group vaccination setting. You are also required to enter data in the "Follow-up Plan" section.

6. Select the **Encounter Codes** tab and enter the required fields. The "Diagnosis" and "Procedure" codes are defaulted for your selection. Make sure you select both the **Diagnosis Codes** and **Procedure Codes** tabs.

7. Click **Submit**.

8. Enter your **Access** and **Verify** codes for VistA. You have to do this only once per OHRS session.

9. Enter your e-Signature code for VistA and click **Sign**.

10. Click **OK** to the confirmation message.

   Next to display is the verification of your electronic signature, followed by a three-part page where you can select patients, or where you can edit the quick load vaccine administration information. (Only two parts of the page display at first.)

11. Enter the patient's last name and last four digits of the SSN, the entire SSN (no dashes), or their last name and then click **Search**.

12. Select the patient from the list. The page expands and displays Part 3, the quick load encounter page:

Figure 30. OHRS—Quick Load Patient Select

13. You can click **Edit Quick Load** at the top of the page if you need to change anything, such as Route of the vaccine being administered to all the patients or you can edit the administration information at the patient level on the bottom of the screen.

14. When you are ready, click **Submit**. You see an informational message that the encounter was successfully created for the particular patient.

15. You can continue to select patients and submit encounters as you administer the vaccines with this page.

> **NOTE**: When you submit vaccine information for the selected patient, the system performs validity checks as well as a check on the vaccine being administered. If the patient has an existing vaccination record that requires no further action, or an additional action, you receive a warning message with the next steps.

16. After you have completed this quick load session, click **Complete Quick Load**. This action allows you to exit from the Quick Load function.

Figure 31. OHRS—Quick Load Encounter Patient Data Entry

> **NOTE**: The **Selected Patient** information in the third part of the page also includes the patient's name, social security number, address, and phone number.

After the quick load vaccination encounter is signed/closed, it *cannot* be edited or updated. If you need to make any changes to the quick load vaccination information after the encounter is closed, you *must* add an addendum to the individual Vaccination encounter for each quick load patient.

7.8.12 Collecting WorkAbility Information for a Patient Encounter

WorkAbility information is that which allows supervisors or other OHRS personnel to see whether or not a particular OH patient (employee, volunteer, provider, etc.) is able to work and if they have any restrictions.

OHRS users are required to collect WorkAbility information when they create an encounter under the General Health category (and eventually, all encounter types under the Occupational Encounter category). The General Health encounter types that require WorkAbility to be collected are:

- Adverse Medication/Vaccination Reaction

- Personal health concerns

- Impaired employee

- Infectious disease

- Pandemic influenza

- Smallpox

NOTE: As of May 2009, WorkAbility information is collected in the Pandemic Influenza encounter only.

To collect WorkAbility information, perform the following procedure:

1. Create an encounter, such as a Pan Flu encounter.

2. In the "SOAPE" area, click the **Plan** tab.

3. Under the **Plan** tab, select the **WorkAbility** tab and answer the preliminary questions.

   Depending on the answers to the preliminary questions, additional questions may need to be answered.

   NOTE: The encounter *cannot* be signed until all the required WorkAbility questions have been answered. These questions include the preliminary WorkAbility questions and if there are any restrictions to the patient's ability to work, at least one restriction *must* be selected.

4. Depending on the restrictions you select, you may have to enter additional weight, frequency, or detail on each restriction selected. For example, if "use of arm" is the restriction selected, you *must* specify which arms and if it can be used continuously or only intermittently. Many permutations exist for each restriction, most based on the CA-17 form.

   If notifications are generated as a result of the answers to the WorkAbility questions, the following occurs:

   - Notifications are sent as per notification rules.

   - After the encounter has been signed, the patient's supervisor receives an informational alert as per alert rules.

5. OHRS users who have the proper permission can print WorkAbility at the patient and encounter levels.

REF: For more information on printing, see the "Printing WorkAbility at the Encounter Level" and "Displaying and Printing WorkAbility at the Patient Level" sections.

7.9 WorkAbility at the Patient Level

7.9.1 Displaying and Printing WorkAbility at the Patient Level

If you have permission, you can view all WorkAbility information previously collected at the individual patient level. This provides a summary view of all WorkAbility dates, duty status, and restrictions for the patient.

7.9.2 Displaying Patient-Level WorkAbility Information

To display the Patient-Level WorkAbility information, perform the following procedure:

1. Sign into OHRS and select your duty station.

2. Select the patient whose WorkAbility information you want to see.

3. Click the **WorkAbility** tab.

4. If WorkAbility information was collected during an encounter, it displays in a list. You can then select the specific encounter whose WorkAbility information you would like to view.

7.9.3 Printing Patient-Level WorkAbility Information

If you have permission to access and print a patient encounter, you can also print any previously collected WorkAbility information from the summarized view at the patient level.

The encounter where the WorkAbility information was collected *must* be in a Closed or Co-sign status.

You can print one or more sets of WorkAbility information at one time. Each individual evaluation prints so that the user has a separate copy of each evaluation printed.

To print the Patient-Level WorkAbility information, perform the following procedure:

1. Display the WorkAbility information as described in the "Displaying Patient-Level WorkAbility Information" section or select the desired WorkAbility encounter in the WorkAbility list.

2. Click **Print**. The PDF is displayed.

REF: For details on what is printed, see the "Printing WorkAbility Information Only" section.

7.10 Printing WorkAbility

7.10.1 Printing WorkAbility at the Encounter Level

If you have the authority, you can print a patient's WorkAbility information at the encounter level. You can do this in two ways:

- Printing WorkAbility Information Only

- Printing WorkAbility with an Encounter

7.10.2 Printing WorkAbility Information Only

If you have the authority, you can print a patient's WorkAbility information alone, without the encounter or addendum information (see the "Displaying and Working with Addendums for a Patient Encounter" section and its sub-sections for information on Addendums). If you have the permission to access and print a patient encounter, you have permission to print the WorkAbility information.

To print the WorkAbility information only, perform the following procedure:

1. Select the appropriate encounter from the list. The encounter has to be in either the Closed or the Co-sign status.

2. Click **View**.

3. Click **Print WorkAbility**.

7.10.3 Printing WorkAbility with an Encounter

You may want to print the WorkAbility information along with the encounter for a patient so that all appropriate, authorized OHRS users can have a hard copy. Any OHRS user who has permission to print an encounter sees the patient's WorkAbility information, which prints on a separate page after the encounter and any addendum information that exists.

The WorkAbility information is helpful for planning staffing needs. You can see whether or not the patient can return to work with or without restrictions, and if there are restrictions, from what dates those restrictions are in effect.

8   Working with Notifications

8.1   Selecting the Notification Library

You can select the Notification Library from the menu item.

Figure 32. OHRS—Notification Template Library
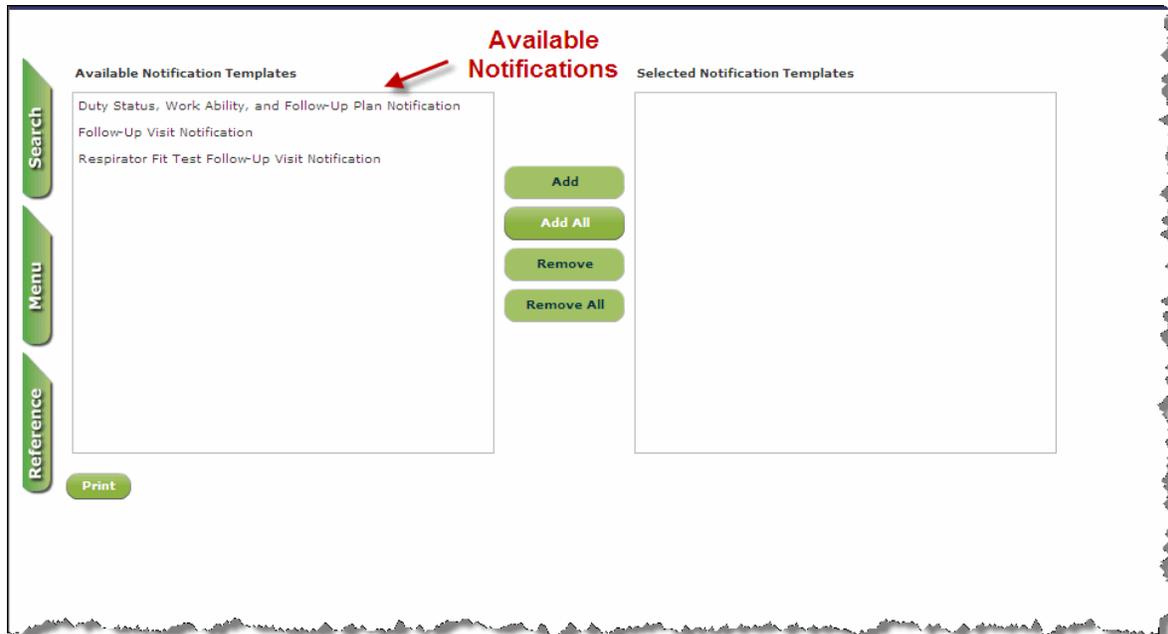
To selecting a template from the Notification Library, perform the following procedure:

1. Select the **Notification Library** menu item.

2. Highlight the template you wish to use.

3. Add template:

    *   Click **Add**.

    OR

    *   If you wish to add all templates, click **Add All**.

4. You may also remove templates from the list or print a selected template by clicking the appropriate buttons:

    *   **Remove**

    *   **Remove All**

    *   **Print**

8.1.1 Working with Notifications from the Encounters List

You can do certain activities with notifications, which are text-based emails based on the encounter, only when you select the Notification from the Encounters List.

8.1.2 Creating and Sending Notifications

To create notifications, perform the following procedure:

1. Select an encounter from the Encounters list.

2. Click the **Notifications** tab.

3. You see the following page:

Figure 33. OHRS—Encounters tab: Creating notifications

4. Click **Create**.

5. Select a **Notification Type** from the drop-down list.

Figure 34. OHRS—Encounters tab: Entering Information and Sending an Email Notification

6. Enter the recipient's email address in the "Add New Recipient" box, and click **Add**.

7. Click **Email Notification**.

8.1.3 Printing Notifications

You can also print a notification that you have selected by clicking the **Print** button. The Notification is displayed as an Adobe® PDF document that you can print.

8.1.4 Re-sending Email Notifications

If you have created the notification, you can re-send the email by clicking the **Email** button.

9   Displaying and Working with Addendums

9.1   Displaying and Working with Addendums for a Patient Encounter

Addendums are additional pieces of information that are associated with an encounter. Addendums can be created and managed by those same providers that have the ability to create encounters; however, the rules of who can view, create, or change an addendum are the same as for encounters.

i   **NOTE:** If you have the appropriate permission, you can view and print the addendums set up for a patient.

The **Addendums** tab displays addendums that you have created for the selected patient or those that have been Closed (Signed or set as needing a co-signature). As an occupational health provider, you can view your own addendums with the status of Open, Closed, or Co-sign. All addendums are displayed on the addendum list for the selected encounter.

- You *cannot* view the details of an addendum created by other providers if the addendum status is Open or Co-signed, or if the addendum belongs to another encounter.

- You can create an addendum, delete, edit, cancel, or sign a selected addendum.

- You can also see if an encounter has existing addendums from the encounter list (if you have permission to see the encounter).

9.2   Creating an Addendum for a Patient Encounter

i   **NOTE:** You *must* have the appropriate security privileges to access the Encounter Addendums function or the option does *not* display.

To create an addendum for a Patient Encounter, perform the following procedure:

1. Select a patient from either **Search Select Patient** (see Section 6.2) or **Create New Patient** (See Section 6.3).

i   **NOTE:** You *must* have created a patient encounter using Manage OH Encounter.

2. Select an encounter with a status of **Closed** or **Co-sign**.

3. With the encounter selected, click **Addendums**.

4. Click **Create**.

5. Enter the Addendum title and note.

6. Click **Submit**.

7. The addendum is added and you receive a confirmation message.

10 Working with Patient Information

10.1 Creating and Updating Patient Information

Patient Information consists of the following:

- Risk Profile

- Work Profile

- Demographics

Figure 35. OHRS—Patient Information tab: Viewing Patient Information

You create patient information when you create the patient encounter. You can update the patient information when necessary; however, the rules of who can view, create, or change patient information are the same as for encounters.

10.2 Creating and Updating the Risk Profile

The Risk Profile displays the risk profile for a patient, and every OHRS patient *must* have a risk profile created. The risk profile indicates how often a patient *must* be evaluated for the designated risk.

To create the Risk Profile, perform the following procedure:

1. Select a patient and encounter.

2. Under the **Patient Information** tab, select the **Risk Profile** tab.

3. Enter the risk location (this is tied to the Duty Station).

   NOTE: There are two risks required for patient information:

   - TB
   - Hepatitis B

   For both of these risks, the frequency of a test for the patient is either exempt (as shown above) or required.

4. For the TB risk, select the appropriate frequency (or exempt).

5. For the Hepatitis B risk, select **Required** or **Exempt**.

6. Add a job risk if needed:

   - See hints for frequency of tests if appropriate; otherwise, select from the choices offered.
   - Be sure to enter the start date of the test. The start date *cannot* be in the future.
   - You can add more than one job risk.

Figure 36. OHRS—Patient Information tab: Adding More Information to Risk Profile

7. Click **Submit**.

You can update the patient risk profile if you have the appropriate security settings. Follow the same instructions as **Create**, except you do not need to enter a risk location (unless you are updating it).

A risk profile generates an Alert for this patient. For example, if the patient is due for a vaccine for Hepatitis B or for a TB screening.

REF: For more information, see the "Managing Alerts" section.

10.3 Creating and Updating the Work Profile

A patient's Work Profile is initially created when the patient's record is created or if the patient data comes from the Personnel and Accounting Integrated Data System (PAID) or Voluntary Service System (VSS) systems.

To create the Work Profile, perform the following procedure

1. Select a patient.

2. On the **Patient Information** page, select the **Work Profile** tab.

3. The work status is entered from the PAID or VSS systems.

4. Enter any of the optional information.

5. Enter the supervisor name. Or, if you do not know it, click **Search**.

6. Enter as much information as you know. If there are many supervisors with the same first characters in the last name, you receive a warning message.

7. Highlight the correct supervisor name and click **Select**.

8. Click **Submit**. A confirmation message displays.

To update the work profile, the steps are nearly identical to adding a work profile. However, you *must* have the proper permission to update a work profile, and the access rules are the same as the access rules for working with an encounter.

10.4 Updating Demographic Information

Each patient has one demographic profile. The Demographic Information is created initially when the patient data comes from the PAID or VSS systems, or part of the Other Federal Agency (OFA) file loads. If the patient is not an employee, volunteer, or OFA employee, and therefore, not part of the PAID, VSS, or OFA file loads, then you can enter certain demographic information manually.

To update the Demographic Information, perform the following procedure:

1. Select a patient.

> **REF:** For information on how to select a patient, see the "Creating a New Patient" section.

2. Select the **Patient Information** tab under the encounter.

3. Select the **Demographics** tab.

> **NOTE:** You *cannot* change any data that comes from the PAID system.
>
> If data is loaded from the VSS or OFA files, the default affiliation is "No Affiliation" and *cannot* be modified.
>
> All other patient types can be edited on the "Demographics" page.

4. Enter the required information, indicated by asterisks.

> **NOTE**: The **Home Phone** field is free-form text and can be from 1 to 30 alphanumeric characters; it can include text, such as "ext." for extension.

5. Click **Submit**.

NOTE: The National Administrator can set an "Erroneous Patient" flag for a patient. These patients are *not* included in any reports. Once a patient is made "Erroneous," only the National Administrator can do a *Search and Select Patient* task. No other role has access to these records.

11 Working with Alerts

11.1 Managing Alerts

Alerts are system-generated messages that provide information. Alerts are one of the following types, as listed in the alerts' "Type" column:

- I—Informational
- A—Actionable

You *must* have the appropriate permission to view alerts. You can delete an "Informational" alert; however, you *cannot* delete an "Actionable" alert until you perform the required action (e.g., sign an encounter).

You *must* be logged into a duty station to see the alerts for that duty station. If you are assigned more than one duty station, you can change duty stations directly from the "Alerts" page.

If you have the appropriate permission, you see an **Alert** message on the initial CISS-OHRS page as soon as you log in. You can click the **Alerts** link at the top of the page, or select **Alerts** from the menu:

1. Select the **Menu** tab.
2. Select **Alerts**.
3. You see a list of alerts for your duty station.
4. From this page, if you have the appropriate permission, you can:

    - For "Informational" alerts: **View**, **Forward**, or **Delete** the alert.
    - For "Actionable" alerts: **View**.
    - **Refresh** the view (additional or fewer alerts might display).
    - **Cancel** out of this view.

The following is a list of the columns on the Alerts list, with links to a description for each item:

- Type
- Patient
- Alert Date/Time
- Message
- From

11.1.1 Type

The "Type" column indicates if an alert is either of the following:

- **I**—Information only
- **A**—Action required

This column can be sorted by Action or Information types.

11.1.2 Patient

Alerts are listed by patient name. The "Patient" column can be sorted alphabetically or in reverse alphabetical order.

11.1.3 Alert Date/Time

The "Alert Date/Time" column is the date/time the alert was triggered. This column can be sorted by newest to oldest or oldest to newest alert dates.

11.1.4 Message

The "Message" column displays the message text or partial text for the alert. This column can be sorted alphabetically or in reverse alphabetical order.

11.1.5 From

The "From" column displays the sender of the alert. This column can be sorted alphabetically or in reverse alphabetical order.

11.2 Viewing Alerts

If you have the appropriate permission, you can view alerts and take appropriate action, if needed.

To view alerts, perform the following procedure:

1. Navigate to the "**Alerts**" page from the **Menu** tab or the **Alerts** link on the CISS-OHRS home page.

2. Select the alert from the list.

3. Click **View**.

4. You are taken to the page from where the alert was generated. For example, the Patient's Risk Assessment for a particular encounter.

5. In the case of an "Actionable" alert, the system takes you to the page where you can perform the action. For example, for an encounter that requires a co-signature, the system takes you to the "Co-sign" page for that encounter.

11.3 Forwarding Alerts

You can forward "Informational" alerts to different providers.

To forward alerts, perform the following procedure:

1. Navigate to the "**Alerts**" page from the **Menu** tab or the **Alerts** link on the CISS-OHRS home page.

2. Select the alert from the list.

3. Select the appropriate user whom you want to receive the alert.

4. Click **Forward**. The number of alerts on the page decreases by one.

Figure 37. OHRS—Forwarding alerts

11.4 Deleting Alerts

To delete an alert, perform the following procedure:

1. Select the alert you want to delete.

2. Click **Delete**.

NOTE: You can delete "Informational" alerts any time. You can delete "Actionable" alerts only after you have completed the required action.

12 Working with Reports

12.1 Understanding Reports

NOTE: You *must* have the appropriate security privileges to access the Reports function or the option does *not* display.

With the Reports function, you can:

- See a list of reports.

- Run a selected report.

- Schedule a report.

- View completed reports in either Adobe® Acrobat PDF or Microsoft® Excel spreadsheet format.

After you have displayed the list of completed reports, you can do the following with a selected report:

- View

- Delete

- Extend the expiration date

- View report parameters

To see a list of reports, select **Report List** from the menu. The list is displayed in a table format, and has the following headings:

- Report Type

- Report ID

- Report Name

- Report Format (.xls or PDF)

- Submitted By

- Date/Time Run

- Expiration Date

After you have displayed the list, you can use an ascending or descending sort filter to sort it by its headings. The **Filter** button displays after you select the heading.

The following is a sample list of the reports with links to their descriptions:

- [Duty Status Reports – WorkAbility](#)

- [Immunity Status Report](#)

- [Vaccination Rate Report](#)

- [Vaccination Status Report](#)

- [Medical Surveillance Clearance Report](#)

- [Infectious Disease Exposure Report](#)

- [Infectious Disease Surveillance Report](#)

- [Other Federal Agency Vaccination Status Report](#)

- [Respirator Fit Test and Training Report](#)

- [Respirator Usage Report for Passed Status](#)

- [OHRS User Access Tracking Report](#)

12.1.1 Duty Status Reports – WorkAbility

This report displays information on employees with the Recommended Duty Status of:

- Return to Duty No Restrictions

- Return to Duty With Restrictions

- Off-Duty

If there is an outbreak of flu, the facility needs to know who can work full time, who is off work, and who can work in a limited capacity. This ability to work equates to "Recommended Duty Status." This report can be:

- A detailed or summary report.

- Localized to the local area, VISN (Region), or the nation.

12.1.2 Immunity Status Report

This report looks at the most current immunization status in the patient record for the selected vaccine and determines if a patient is immune by the vaccination parameters (by vaccination, by history, etc.), or is susceptible by other parameters (vaccination refused, etc.). This report can be:

- A detailed or summary report.

- Localized to the local area, VISN, or the nation.

Only closed vaccination encounters are included in this report.

12.1.3 Vaccination Rate Report

This report shows the percentage of patients who are vaccinated or not vaccinated for a specific vaccine. If a patient does not have an immunization history in the system, they are considered unvaccinated for purposes of this report. This report can be:

- A summary report only.

- Localized to the local area, VISN, or the nation.

12.1.4 Vaccination Status Report

This report displays a patient's vaccination status, which can be either vaccinated, not vaccinated, or vaccination in progress. Rules are different for every vaccine. You can run the report against only one vaccine at a time. This report can be:

- A summary report or a detailed report.

- Localized to the local area, VISN, or the nation.

Only closed vaccination encounters are included in this report.

12.1.5 Medical Surveillance Clearance Report

This report displays if a patient is medically cleared to work with a respirator or not. This report can be:

- A summary or detailed report.

- Localized to the local area, VISN, or the nation.

12.1.6 Infectious Disease Exposure Report

This report displays information about patients who have been exposed to a specific infectious disease and lists if they have used protective equipment, such as a mask or respirator. This report can be:

- A summary or detailed report.

- Localized to the local area, VISN, or the nation.

12.1.7 Infectious Disease Surveillance Report

This report displays information about patients with suspected, probable, or confirmed cases of a specific infectious disease. This report can be:

- A summary or detailed report.

- Localized to the local area, VISN, or the nation.

12.1.8 Other Federal Agency Vaccination Status Report

This report displays the vaccination status of patients who belong to Federal Agencies other than the VA. This report can be:

- A summary or detailed report.

- Localized to the local area, VISN, or the nation.

12.1.9 Respirator Fit Test and Training Report

This report displays information about patients' respirator fit test and training results. It can be only a detailed report.

12.1.10 Respirator Usage Report for Passed Status

This is a Summary Station report that aggregates counts of respirator type, model, manufacturer, size, and number who passed the Respirator Fit Test encounter.

12.1.11 OHRS User Access Tracking Report

This report displays information about end-users of the OHRS system, including data about their login activity. This report can be:

- A summary only report.

- Localized to the local area, VISN, or the nation.

- Run by only Local, Regional, and National Administrators.

If OHRS does not have any patients that fall within the report parameters selected, it outputs the following message:

"No data found that meets the selected report criteria"

12.2 Running a Report

To run a selected report, perform the following procedure:

1. Highlight the report you want from the list of reports.

2. Click **Run Report**.

3. From the page that displays, enter the required information. It differs based on the type of report you are running.

> **NOTE**: If you choose the "As of Date," it collects data that was entered on or before the As of Date.

Figure 38. OHRS—Report List tab: Report Data Selection

4. Select the Duty Stations from which you want to run the report.

5. Select the format in which the report is to be generated:

   - Adobe® PDF (.pdf)

   - Microsoft® Excel (.xls)

6. Click **Run Report**.

12.3 Scheduling a Report

To schedule a report, perform the following procedure:

1. Highlight the report you wish to schedule from the list of reports.

2. Click **Schedule Report.**

    You can schedule a report to run during a specific day and time and can request that the system send an email notification to you after the report has been run.

Figure 39. OHRS—Report List tab: Scheduling a report

3. Select at least the required information.

Figure 40. OHRS—Report List tab: Selecting report information (1 of 2)

4. Click **Next**.

Figure 41. OHRS—Report List tab: Selecting report information (2 of 2)

| Report List | Scheduled Reports | Completed Reports |

Report Name: Adverse Reaction Report (AR 1)

Frequency - "How often does the report run?"

Generate Report: * Daily/Weekly ▼

Day to Generate Report: * ☐ Monday ☐ Tuesday ☐ Wednesday
☐ Thursday ☐ Friday ☐ Saturday
☐ Sunday

Time to Generate Report: * Select ▼ hour(s) Select ▼ minute(s)

EMail Report Notification To: To enter multiple emails, separate each address with a comma (,).

Brian.Lynch@va.gov

Date Range - "What data should be displayed?"

| From Date | To Date |

○ Current day
○ Specific fixed date: [   ] 🖩
○ Exactly [1] Week(s) ▼ prior to current day
◉ First ▼ day of Previous ▼ Month ▼

Cleanup - "Completed reports should be retained for how many days?"

Keep report for: * 365 days

Schedule Report Back Reset Cancel

5. Enter at least the required scheduling parameters that display. The parameters differ depending on the schedule frequency chosen.

ⓘ **NOTE:** Time is in military time (i.e., 0 hours = midnight, 23 hours = 11:00 PM).

You can also enter email addresses of people who need to be notified that the report has been completed.

6. Click **Schedule Report**.

7. After the system has scheduled the report, you can click the **Scheduled Reports** tab to see what has been scheduled.

   If you highlight a report, you can cancel it only when you are the person who scheduled the report.

Figure 42. OHRS—Scheduled Reports tab: Reviewing scheduled reports

Report List	Scheduled Reports	Completed Reports

Report Type	Report ID	Report Title
Adverse Reaction	AR 1	Adverse Reaction Report

12.4 Viewing Scheduled Reports

To view a list of scheduled reports, perform the following procedure:

1. Select the **Scheduled Reports** tab.
2. You can see the reports that have been scheduled and the local date/time stamp when each is scheduled to run. The time is shown in military time format.

To cancel a scheduled report, perform the following procedure:

1. Highlight the report.
2. Click the **Cancel** button.

ℹ️ **NOTE:** The **Cancel** button is displayed only when you are the requester who scheduled the report.

12.5 Viewing a Completed Report

Completed reports are displayed in a list, and the list contains all of the OHRS list attributes. You can sort lists by any heading, and you can use the **Right** (**Alternate**) mouse button to bring up a list of available commands.

To view a report after you have run or scheduled it (and it has run), perform the following procedure:

1. Select the **Completed Reports** tab. Remember that you can sort the list that displays by any of its headings.

2. Highlight the report you want to view.

3. Click the **View** button.

4. To view the highlighted report's parameters, click the **View Parameters** button. The parameters display.

When reports are run in Microsoft® Excel (.xls) format, the Excel spreadsheet has two tabs:

- **Report Parameters**

- **Report Data**

Completed reports expire one year after they have been generated (run) and they are deleted from the system. You can extend the report's expiration date by clicking the **Extend Expiration** button. This action extends the report's expiration date to one year from the current date, or the date you execute the command.

12.6 Working with the Completed Reports Search Filter

From the **Completed Reports** tab, a Search Filter allows you to sort by the following:

- Report Type

- Report Title

- File Type

- Date Run

- Expiration Date

- Report ID

- Submitted By

Figure 43. OHRS—Completed Reports tab: Completed Reports Search Filter

Each filter drop-down allows you to customize your filter results. To filter data, perform the following procedure:

1. Select your filter details.

2. Click **Filter** to sort the report's data.

3. Click **Reset** to clear the filter drop-down contents.

4. The **Search Filter** allows you to select from values that already exist in the completed reports list. For example, if you see **Respiratory Protection Program** in your completed reports list, you will also see it in the search filter options.

Figure 44. OHRS—Search Filter Results

Report Type	Report ID	Report Title	Report Format	File Type	Submitted By	Date Run	Expiration Date
Respiratory Protection Program	RPP 2	Respirator Usage Report for Passed Status	Summary	PDF	CISSuserS, Four	10/16/2009 15:31 CDT	10/16/2010
Respiratory Protection Program	RPP 2	Respirator Usage Report for Passed Status	Summary	PDF	ciss1, ciss1	10/16/2009 15:27 EDT	10/16/2010
Respiratory Protection Program	RPP 2	Respirator Usage Report for Passed Status	Summary	PDF	CISSuserA, One	10/16/2009 15:16 EDT	10/16/2010

12.6.1 Sorting the List

You can sort the list of completed reports with or without using the search filter.

You can click on any of the column headers to sort by that column in ascending or descending order.

The **Date Run** column is automatically a secondary sort, and all sorts display in descending (newest to oldest) date order as the default. You can change the default to ascending (oldest to newest) by clicking the **Date Run** column; however, this action removes your first column sort.

12.7 Generating an OHRS User Access Tracking Report

As an OHRS user, you can run a "User Access Tracking" report to generate information about end-users of the OHRS system, and also, to provide you a glimpse into specific time periods of login activity.

The following roles can run the user access tracking report:

- National Administrator
- Regional Administrator
- OH Local Administrator

If you are a National Administrator, the report format privileges are different.

NOTE: You *must* have the correct privileges to run a user access tracking report. If you do not, you will *not* be able to choose a station from which to run the detailed report.

12.8 Generating Medical Surveillance Reports

If you have the proper permission, you can run a report that displays a list of patients who are or are not medically cleared for a specific surveillance (e.g., a respirator, which is the only medical surveillance available currently). These reports can be detailed or summary.

Various users are allowed to run the medical surveillance report, including safety officers, but administrators are allowed to run summary reports only.

12.9 Generating Other Federal Agency Reports

You can run vaccination status reports that display information on the vaccination status of patients who are from Federal agencies other than the Department of Veterans Affairs (VA). The reports are generated per vaccination and can be generated as a summary and a detailed report. The summary report displays the specific vaccination status of:

- Vaccinated

- Vaccination in Progress

- Not Vaccinated

The detailed report displays the names of people who are active employees of the other Federal agencies who have a vaccination encounter in OHRS. It displays whether they have been vaccinated or not, based on the encounter. It groups the patients by agency.

The detailed report is an exception to the OHRS rule that National Administrators can run summary reports only. In this instance, National Administrators can run detailed reports.

These reports look at *all* Other Federal Agency (OFA) patients whose Visited Station (at the 3-digit station number) is the same as the Visited Station selected in the report parameters. If the report is run using the "From and To Dates," the system includes any OFA patient who has had a Work Status of "Active" (no separation date) at least one day within the dates specified. If the report is run using the "As of Date," the system excludes those patients who have a Work Status of "Inactive."

13 Working with Adverse Reaction Reports

13.1 Adverse Reaction Reports

There are four Adverse Reaction reports:

- **Detailed Station Adverse Reaction Report**—It tracks detailed information on patients who have had an adverse reaction to some medication, and therefore, have an encounter created for them in OHRS.

- **Detailed Other Federal Agency Adverse Reaction Report**—It tracks detailed information on Other Federal Agency employees who have had an adverse reaction to some medication, and therefore, have an encounter created for them in OHRS.

- **Adverse Reaction Type by Medication Report**—This summary report displays the type of adverse reactions, by medication. This report displays the medication-induced adverse reaction information captured for VA employees by duty station.

- **Other Federal Agency Adverse Reaction Type by Medication Report**—This summary report displays the type of adverse reactions, by medication. This report displays the medication-induced adverse reaction information captured for patients of other Federal Agencies who have visited VA stations.

All of these reports can be run for only one medication at a time, and can be generated further for a specific date range for the encounters, lot number, or manufacturer.

13.2 Detailed Station Adverse Reaction Report

This report allows practitioners to track, by medication, any adverse reaction to a medication dispensed or taken. A "Detailed Station Adverse Reaction" report lists the names of VA (or OFA) patients in a duty station who have had adverse reactions documented in an Adverse Reaction encounter. The report output includes the following:

- Adverse Onset Date

- Manufacturer

- Lot Number

- Reaction Type

13.3 Detailed Other Federal Agency Adverse Reaction Report

This report allows practitioners to track, by medication, any adverse reaction to what was dispensed or taken. A Detailed Station Adverse Reaction report lists the names of Other Federal Agency (OFA) patients in a visited station who have had adverse reactions documented in an Adverse Reaction encounter. The report output includes the following:

- Adverse Onset Date

- Manufacturer

- Lot Number

- Reaction Type

Figure 45 is an example of an Other Federal Agency Detailed Station Adverse Reaction report. The same type of information is available in a non-OFA format, too:

Figure 45. OHRS—Sample Detailed Other Federal Agency Adverse Reaction Report

13.4 Summary Adverse Reaction Type by Medication Reports

The summary "Adverse Reaction Type by Medication Report" allows practitioners to track, by medication, the types of adverse reactions encountered by patients. The report can be grouped by each visited station, depending on the permissions of the person running the report.

There are two types of these reports:

- Other Federal Agency (OFA) patient data.

- Non-OFA patient data.

If you choose to run the "Other Federal Agency Adverse Reaction Type by Medication Report," it displays the same type of information but is grouped by each agency selected, and then by visited duty station.

REF: To run these reports, follow the instructions found in the "Running a Report" section.

Figure 46 through Figure 48 are samples of each of the summary Adverse Reaction Type by Medication Reports, starting with OFA:

Figure 46. OHRS—Sample Summary Other Federal Agency Adverse Reaction Type by Medication Report

Figure 47. OHRS—Sample Page 1 of Summary Adverse Reaction Type by Medication Report (non-OFA)

Figure 48. OHRS—Sample Page 2 of Summary Adverse Reaction Type by Medication Report (non-OFA)

Summary Adverse Reaction Type by Medication Report
for HEPATITIS B

Duty Station : CHEYENNE VAMC(#442)

Reaction Type	Manufacturer	Lot Number	Route of Administration	Total Number
Sub Total				2
Other	Pfizer	12345	Intramuscular	1
Other	PFIZER	123456	Intramuscular	3
Other	pfizer	456789	Intramuscular	1
Other	pfizerq	123456	Intramuscular	1
Other	PFZER	123456	Intramuscular	1
Other			Intramuscular	5
Other				4
Sub Total				16
Sudden Death	Pfizer		Intramuscular	1
Sudden Death				1
Sub Total				2
TOTAL				43
GRAND TOTAL				43

13.5 Running an Adverse Reaction Type by Medication Report

This is a summary report that aggregates and presents summary information about the types of adverse reactions to medications that occur and are documented within Adverse Reaction encounters in OHRS. This report allows health practitioners to track if specific manufacturers and lot numbers are generating large numbers of adverse reactions. This information enables the health practitioners to avoid medications that are causing health issues.

REF: To run the Adverse Reaction Type by Medication Report, follow the same steps in the "Running a Report" section.

Figure 49. OHRS—Report List tab: Adverse Reaction Type by Medication Report

The report output includes the following:

- VISN
- Duty Station
- Reaction Type
- Manufacturer
- Lot Number
- Route of Administration
- Total Number

Figure 50 is an example of what the report should look like:

Figure 50. OHRS—Sample National Summary Adverse Reaction Type by Medication Report

14 Working with Infectious Disease Reports

14.1 Running Infectious Disease Reports

If you have the proper permission, you can run an exposure or surveillance report that displays information about patients who have been exposed to an infectious disease. You can run a detailed or summary report depending on your permissions:

- Summary Report—Lists the numbers of patients with an infectious disease.

- Detailed Report—Includes patient names and dates of exposure.

14.1.1 Running an Infectious Disease Exposure Report

You can generate a detailed "Infectious Disease Exposure" report that gives you the names of patients who have been exposed to an infectious disease with or without the use of personal protective equipment, or you can generate a "Summary Exposure" report that shows you the number of patients who have been exposed to an infectious disease with or without the use of personal protective equipment.

NOTE: On both the summary and detailed reports, if a patient was exposed to a specified infectious disease more than once, both exposures are counted.

is a sample of a "Summary Infectious Disease Exposure Report."

Figure 51. OHRS—Sample Summary Infectious Disease Exposure Report

National Report
Infectious Disease Exposure Report
Pandemic Influenza

From Date: 05/31/2009
To Date: 06/15/2009
Date/Time Run: 07/07/2009 17:47 CDT

VISN	Duty Station	No Protection	Mask	Respirator	Total
VISN 10	DAYTON(#552)	6	6	6	18
TOTAL		6	6	6	18

VISN	Duty Station	No Protection	Mask	Respirator	Total
VISN 19	CHEYENNE VAMC(#442)	8	7	6	21
	SALT LAKE CITY HCS(#660)	10	10	10	30
TOTAL		18	17	16	51
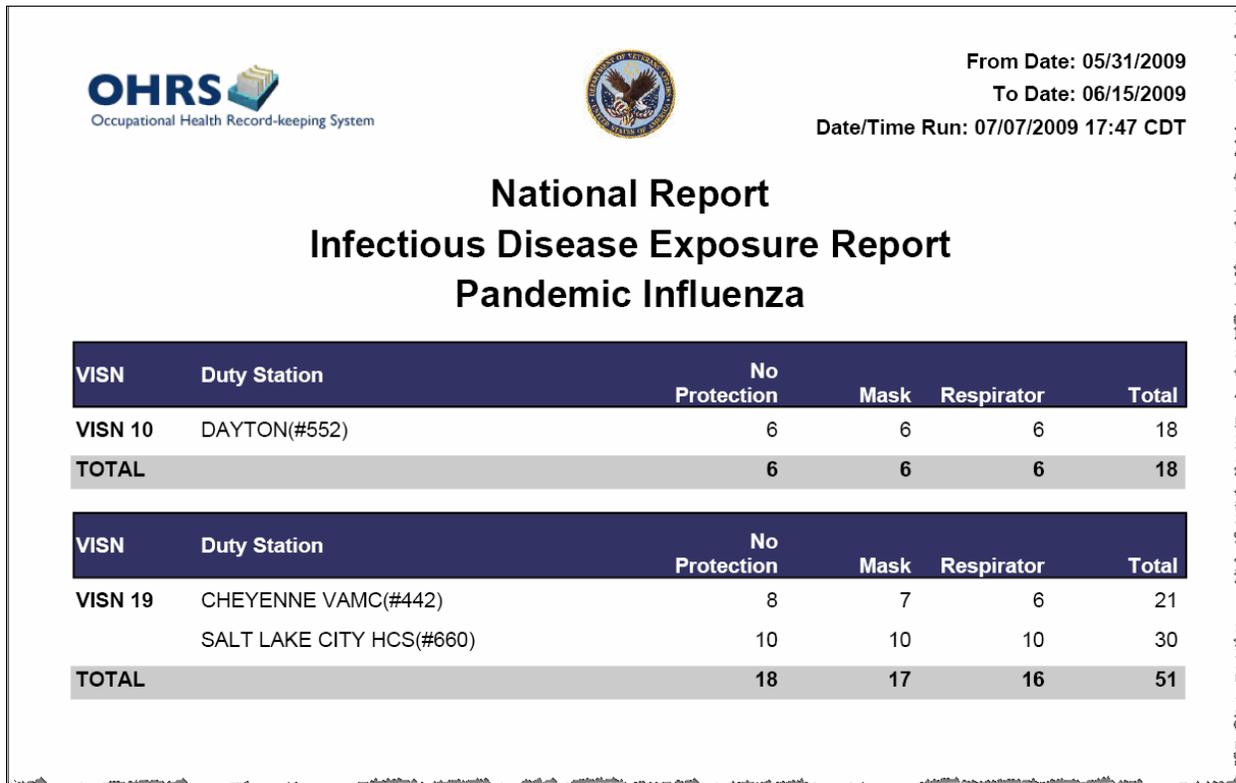
NOTE: The "Exposure" report displays the VISNs and Duty Stations that you selected.

14.1.2 Running an Infectious Disease Surveillance Report

You can generate a detailed "Infectious Disease Surveillance Report" that lists the names of patients in a duty station with suspected, probable, and confirmed cases of an infectious disease by the Service Product Line, Occupational Series, and Location. The detailed report also gives the Date of Decision (the date when it was decided that the patient had a suspected, probable, or confirmed case of the infectious disease).

You can also generate a "Summary Infectious Disease Surveillance Report" that displays the number of employees in a duty station, VISN, or throughout the nation with suspected, probable, or confirmed cases of an infectious disease by Service Product Line, Occupational Series, and Location.

Figure 52 is an example of a summary "Infectious Disease Surveillance Report:"

Figure 52. OHRS—Sample Summary Infectious Disease Surveillance Report

OHRS
Occupational Health Record-keeping System

From Date: 05/31/2009
To Date: 06/15/2009
Date/Time Run: 07/07/2009 18:06 CDT

National Report
Infectious Disease Surveillance Report
Pandemic Influenza

VISN	Duty Station	Suspected	Probable	Confirmed	Total Cases
VISN 10	DAYTON(#552)	10	8	31	49
TOTAL		10	8	31	49
VISN	**Duty Station**	**Suspected**	**Probable**	**Confirmed**	**Total Cases**
VISN 19	CHEYENNE VAMC(#442)	11	11	24	46
	SALT LAKE CITY HCS(#660)	11	10	20	41
TOTAL		22	21	44	87

For the assessment categories, the order of severity is:

- Confirmed (highest severity)

- Probable

- Suspected (lowest severity)

If a patient has more than one encounter with different assessments, the system counts only the encounter with the *highest* severity level in the summary report. For example, if a patient has three encounters with three different assessments, only the "Confirmed" assessment is counted in the summary report. If a patient has one encounter with a "Suspected" assessment and another with a "Probable" assessment, only the "Probable" assessment is counted in the summary report.

However, in the detailed report, *all* assessments are included. For example, if CISSpatient Two had one "Probable" and one "Confirmed" assessment, both assessments are noted in the detailed report but only the "Confirmed" assessment is counted in the summary report.

14.2 Working with Vaccination Reports

14.2.1 Generating Vaccination Reports

If you have permission in OHRS, you can generate "Vaccination" reports for any vaccination. You can run summary or detailed vaccination status reports, depending on your permission settings. If you have a single role and if you are allowed to generate reports, you are allowed to generate them based on that role and its functional areas only.

If you have a dual role, such as that of an administrator, the reports you can generate are based on the functional area you are responsible for or any exceptions driven by the business rules for the individual report.

14.2.2 Generating a Vaccination Administration Report

This report displays the Number of Vaccination Doses Administered by the Visited Station. You can run the report against only one vaccine at a time. This report is a summary report and can be localized to the division or VISN level, or run at the national level.

- All encounters where the "**Yes**" radio button was selected next to **Vaccination Administered** are included in this report.

- Only closed vaccination encounters are included in this report.

Figure 53 is a sample of Summary Vaccination Administration Report.

Figure 53. OHRS—Sample Vaccination Administration Report

14.2.3 Generating a Vaccination Status Report

This report displays a patient's vaccination status. You can verify if patients:

- Are vaccinated

- Are not vaccinated

- Have the vaccine in progress

Rules are different for each vaccine. You can run the report against only one vaccine at a time. Only closed vaccination encounters are included in this report.

There are two types of vaccination status reports:

- **Summary Reports**—Display the number of patients

- **Detailed Reports**—Display the names of patients

If you have the appropriate permission, you can run one or both report types. Reports are divided by duty station and/or VISN (if local or regional), or by National.

This report looks at all patients whose duty station (at the 3-digit level) is the same as the duty station selected in the report parameters.

- If the report is run using the "**From and To Dates**," the system includes any patient who has had a Work Status of "**Active**" (no separation date) at least one day within the dates specified.

- If the report is run using the "**As of Date**," the system excludes those patients who have a Work Status of "**Inactive**."

Figure 54 is a sample of a summary report from a National Administrator:

Figure 54. OHRS—Sample Summary Vaccination Status Report

NOTE: National Administrators *cannot* run detailed reports.

14.2.4 Generating a Vaccination Rate Report

This report displays the percentage of patients who are or who are not vaccinated for a specific vaccine. If patients do not have a vaccination history in the system, they are considered unvaccinated for purposes of this report. It is a summary report only, but can be localized to the division or VISN level, or run at the national level.

This report looks at all patients whose duty station (at the 3-digit level) is the same as the duty station selected in the report parameters.

- If the report is run using the "**From and To Dates**," the system includes any patient who has had a Work Status of "**Active**" (no separation date) at least one day within the dates specified.

- If the report is run using the "**As of Date**," the system excludes those patients who have a Work Status of "**Inactive**."

Figure 55 is a sample of a Vaccination Rate Summary Report at the National level:

Figure 55. OHRS—Sample Vaccination Rate (National) Report

As of Date: 06/26/2009
Date/Time Run: 06/26/2009 12:00 EDT

National Report

Summary Varicella Vaccine Vaccination Rate

VISN	Duty Station	Number Vaccination in Progress	Total Number of Patients	Total Rate By Percent
VISN 19	CHEYENNE VAMC(#442)	2	790	0 %
Total		2	790	0 %
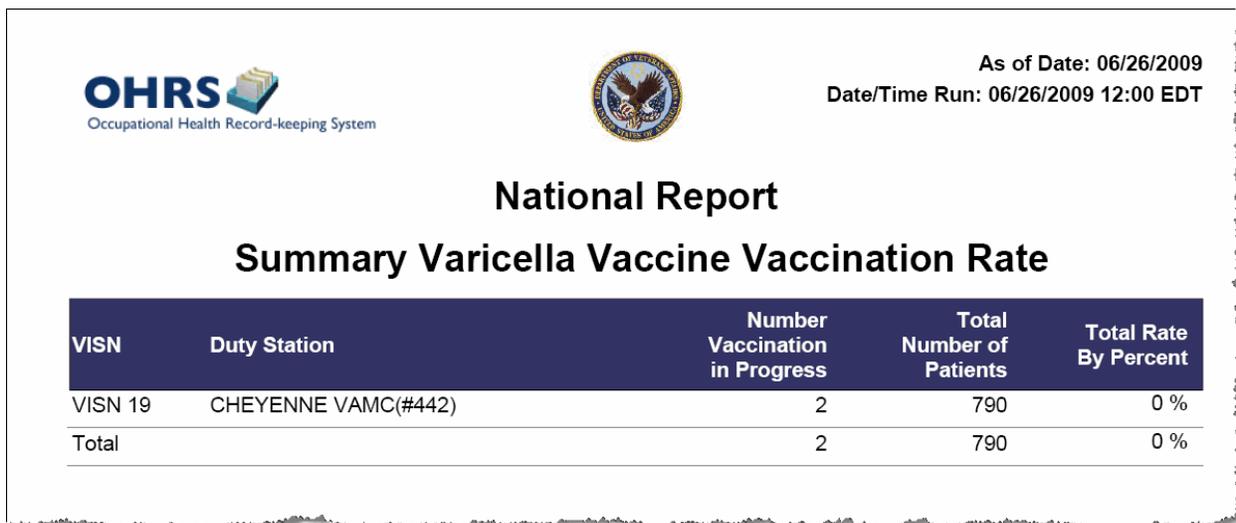
14.2.5 Generating an Immunity Status Report

This report looks at the most current immunization status in the patient record for the selected vaccine and determines if a patient is immune by the vaccination parameters (by vaccination, by history, etc.), or is susceptible by other parameters (vaccination refused, etc.).

Depending on your permission settings, it can be a summary or detailed report:

- **Summary Report**—Lists the number of patients who are immune, susceptible, or both.

- **Detailed Report**—Lists the names of patients who are immune, susceptible, or both.

It can be localized to the division or VISN level, or run at the national level. Only closed vaccination encounters are included in this report.

This report looks at all patients whose duty station (at the 3-digit level) is the same as the duty station selected in the report parameters.

- If the report is run using the "**From and To Dates**," the system includes any patient who has had a Work Status of "**Active**" (no separation date) at least one day within the dates specified.

- If the report is run using the "**As of Date**," the system excludes those patients who have a Work Status of "**Inactive**."

    NOTE: The detailed report lists the "Date of Decision" if it exists in the patient record (the date it was decided that a patient is immune or susceptible to a specific disease).

Figure 56 is a sample of a Summary Immunity Status report (National):

Figure 56. OHRS—Sample Immunity Status Summary (National) Report

Summary Immunity Status for Pandemic Influenza

Duty Station : CHEYENNE VAMC(#442)

Service/Product Line	Occupational Series	Location	Number Immune	Number Susceptible	Total Number
Biomedical Engineering	Biomedical Equipment Support Specialist	Location B	0	34	34
	Sub Total		0	34	34
Sub Total			0	34	34
Medical	Physician Assistant	risk location field text	0	1	1
	Sub Total		0	1	1
Sub Total			0	1	1
Nursing	Nursing Assistant	Location C	0	24	24
	Sub Total		0	24	24
	Registered Nurse		0	1	1
	Sub Total		0	1	1
Sub Total			0	25	25
Office of Information and Technology	Administrative Support	Location B	0	23	23
	Sub Total		0	23	23
Sub Total			0	23	23
Physical Medicine and Rehabilitation	Biomedical Equipment Support Specialist	Location A	0	24	24
	Sub Total		0	24	24
Sub Total			0	24	24
Research	Anthropologist		0	1	1
	Sub Total		0	1	1
Sub Total			0	1	1
TOTAL			0	794	794

14.3 Generating Duty Status Reports

14.3.1 Generating Duty Status Reports (WorkAbility)

As an OHRS user, you can run a report that provides information on employees with the Recommended Duty statuses of any of the following:

- Return to Duty No Restrictions

- Return to Duty With Restrictions

- Off Duty

In OHRS this information is also known as WorkAbility. There are two types of WorkAbility reports:

- **Summary Report**—Lists the number of patients at the station, VISN, or national level with a specific Recommended Duty Status.

- **Detailed Report**—Lists the name of each patient with a specific Recommended Duty Status.

To run the report, start by selecting **WorkAbility** from the reports list.

NOTE: At the time that OHRS went live into Production, there were no existing encounters with WorkAbility. This means that under certain report scenarios, patient records that had no WorkAbility were included in the report output.

NOTE: You *must* have the correct permission to run a "Duty Status Report." If you do not, you will *not* be able to run it. You will know if you cannot choose a duty station from which to run the report.

REF: The instructions for running the summary "Duty Status Report" are the same as those found in the "Running a Report" section.

A summary "Duty Status Report" for a station is sorted in the following order:

1. Station.
2. Service/Product Line.
3. Occupational Series.

The steps for running a detailed "Duty Status Report" are the same as those for running a summary report, except you need to select "**Detailed**" from the "Report Format" drop-down list, and only certain roles, such as OH Provider, have permission to run a detailed report.

On a detailed report, if you select a "Recommended Duty Status" of "**Return to Duty With Restrictions**" or "**Off Duty**," the system gives you the option of filling in the "Duty Status Expires Within X Days" field. You can then enter the number of days from the report run date to the Duty Status expiration date and you will find out which users are due for re-evaluation.

For example, if you run a report on May 2 and select "Duty Status Expires Within 10 Days," the system lists the users whose duty status expires on May 12.

14.4 Working with Respirator Fit Test Reports

14.4.1 Generating a Respirator Fit Test and Training Report

As an authorized OHRS user, you can generate a "Respirator Fit Test and Training Report" that provides Fit Test Detail by person so that you can assess the overall status of those who have been Fit Tested and Trained by Service/ Product Line, Occupational Series and Location. You can generate a Detailed Respirator Fit Test and Training Report. You can select all patient types to display in the VISN or National report.

> **REF:** The steps for Generating a Respirator Fit Test Report are the same as those found in the "Running a Report" section.

The following report data appears on the Respirator Fit Test and Training Report:

- From/To or As of Date
- Date/Time Report Run
- Duty Station (Name and Station Number)
- Service/Product Line
- Occupational Series
- Location
- Name
- Respirator Status
- Respirator Type
- Respirator Manufacturer
- Manufacturer Model Number
- Respirator Size

> **NOTE:** If the Respirator Size is listed as "Other", you can access the Encounter on OHRS to view the comments.

- Training Completed Date

- Encounter Status (Open or Closed)

ℹ **NOTE:** This Report pulls patients with an Active Work Status.

14.4.2 Information for Respirator Fit Testers, Safety Officers, and RFT Trainers

When generating Respirator Fit Test (RFT) reports, *never* perform a fit test on the following two Patient Status types:

- Contractor
- Visitor

Do *not* select these patient status types when creating an RFT report.

14.4.3 Generating a VISN/National Respirator Usage Report for Passed Status

If you have the appropriate permissions, you can generate a VISN/National Respirator Usage Report for Passed Status that aggregates counts for the following:

- Respirator Type
- Status
- Manufacturer
- Number of people who passed Fit Test by Service/Product Line and Occupational Series.

This is a Summary report.

You can select all patient types to display in the VISN/National report.

Figure 57 shows how this report appears in the report list.

Figure 57. OHRS—Report List tab: Sample Respirator Usage Report for Passed Status - Report List

REF: The steps for generating a "VISN/National Respirator Usage Report" are the same as those found in the " Running a Report" section.

Depending on your permissions, the title of the report and data generated in the columns of the report will vary. For example:

- If the Regional Administrator generates the report, the title is "VISN Report."

- If the National Administrator generates the report, the title is "National Report."

- If the VISN-National Safety IH generates the report, the title is "VISN/National Report."

NOTE: Only the respirator types you select are listed in the "Respirator VISN/National Respirator Usage Report."

14.4.3.1   Generating a Respirator Usage Report for Passed Status

This is a Summary Station report that aggregates counts of the following:

- Respirator Type

- Model

- Manufacturer

- Size

- Number that passed the Respirator Fit Test encounter

To run or schedule the report, perform the following procedure:

1. Select **Menu.**

2. Select **Reports**.

3. Select **Report List** to display a list of available reports.

4. Select the **Respirator Usage Report for Passed Status**.

5. Click **Run Report** to display the next page (see Figure 58).

i   **REF:** To schedule a report, see the "Scheduling a Report" section.

Figure 58. OHRS—Sample parameter fields for the Respirator Usage Report for Passed Status Report

6. Select a date range for the report.

7. Select a **Respirator Type**.

8. Select a **Patient Type**.

9. Select one or more duty stations using the **Add** or **Add All** buttons.

10. Select a **File Type** for the report:

- Adobe® PDF (.pdf)

- Microsoft® Excel (.xls)

11. Click **Run Report**.

12. Click the **Completed Reports** tab.

13. Select the completed report.

14. Click the **View** button to display the report (see Figure 59).

Figure 59. OHRS—Sample "National/VISN Report Respirator Usage Report for Passed Status"

15 Working with Administrative Tasks

15.1 Performing Administrative Tasks

Administrators have the ability to manage various tasks. They can do the following:

- Manage the permission settings that drive the activities a particular provider can perform.

- Assign administrative and functional stations to a system user within their own station.

- Manage the users under their own area or those of areas under their responsibility.

There are also various levels of system administrators:

- Local

- Regional

- National.

Local Administrators can assign stations to a system user within their own station.

Regional Administrators and National Administrators have a larger pool of stations they can assign a system user. This is helpful when a system user is an OH provider at multiple facilities.

15.2 Managing System Users

ℹ️ **NOTE:** You *must* have the appropriate security privileges to access the Manage System User option, or the option does *not* display.

To manage a system user, perform the following procedure:

1. Select **Administration**.

2. Select **Manage System User**.

3. Identify the person whom you want to manage by entering either of the following:

   - User ID

   - Last Name

4. Click **Search**.

5. Highlight the user you want and click **Select**.

Figure 60. OHRS—Managing a System User

6. Select the appropriate role for this user and click **Add**.

7. The functional stations available to the administrator display on the left. To narrow the choices available:

    a. Type a station number in the **Filter** box.

    b. Click **Filter**.

    c. Select the appropriate stations.

    d. Click **Add**.

8. When you have all the choices you want for this user, click **Submit**.

16 Managing System Roles

The "Manage System Role" page allows an administrator to assign or remove permissions that are linked to roles, or to create a role.

16.1 Assigning or Removing Permissions for a Role

To assign or remove permissions for a role, perform the following procedure:

1. Follow this path to display the Manage System Role screen:

    a. Select **Menu**.

    b. Select **Administration**.

    c. Select **Manage System Role**.

2. Choose a role from the drop-down list, and then click the **Select** button to display the "Role Name" page.

3. Add/Delete Permissions:

    - Add Permission—Select an "Available Permission" from the left-hand list and then click the **Add** button to *add* the permission to the role.

    OR

    - Delete Permission—Select an "Assigned Permission" from the right-hand list and click the **Remove** button to *delete* the permission from the role.

4. Click **Submit** to save changes to the role.

16.2 Creating a Role

To create a role, perform the following procedure:

1. In the Manage System Role page, enter a role name in the text box.

2. Click **Add** to display the Role Name page.

3. Select an "Available Permission" from the left-hand list, and then click the **Add** button to add the permission to the role.

4. After adding the permission, it can be removed by selecting it and clicking **Remove**.

16.3 Inactivating a System User

Administrators can inactivate a system user. This function is used when a user is no longer employed, for instance, or for other reasons that would require a user's ID to be inactivated. This requires that you enter a precise date and a reason.

To inactivate a system user, perform the following procedure:

1. Select **Administration**.
2. Select **Manage System User**.
3. Identify the person whom you want to manage by entering either of the following:
   - User ID
   - Last name and click **Search**.
4. Highlight the user you want and click **Select**.
5. Select the **Inactivate** check box.
6. Select an Inactivate date.
7. Select an Inactivate reason.
8. Click **Submit** when finished to save changes.

16.4 Unlocking and Locking a System User

Administrators can unlock a system user whose ID has been locked out (see the "Login Lockout" section), as well as lock a system user out of the system if there is an appropriate reason.

To lock or unlock a system user, perform the following procedure:

1. Select **Administration**.
2. Select **Manage System User**.
3. Identify the person whom you want to manage by entering either of the following:
   - User ID
   - Last Name
4. Click **Search**.
5. Highlight the user you want and click **Select**.
6. Set the **Locked** check box accordingly:
   - *Select* the **Locked** check box to *lock* a user ID.

     OR

   - *Deselect* the **Locked** check box to *unlock* a user ID.
7. Click **Submit** when finished to save changes.

16.5 Unlocking a System Administrator

16.5.1 Local Administrator

If a Local Administrator is locked out of the system, only a Regional Administrator with the assigned responsibility for that Local Administrator and National Administrator can unlock them.

The system displays a message to the locked out administrator to contact their Regional or National Administrator for assistance.

16.5.2 Regional Administrator

If a Regional Administrator is locked out of the system, only a National Administrator can unlock them.

The system displays a message to the locked out Regional Administrator to contact the National Administrator for assistance.

16.5.3 National Administrator

If a National Administrator is locked out of the system, only another National Administrator can unlock them.

The system displays a message to the locked out National Administrator to contact another National Administrator for assistance.

16.6 Creating a System User

To create a user in the OHRS system, the user *must* first be in the Personnel and Accounting Integrated Data System (PAID) or Voluntary Service System (VSS) systems. Users will be in the list as defined in the "Managing System Users" section, and the steps for adding the user to the system are exactly the same as found in this section.

To create a system user, perform the following procedure:

1. Select **Administration**.
2. Select **Manage System User**.
3. Identify the person whom you want to create by entering either of the following:
    - User ID
    - Last Name
4. Click **Search**.
5. Highlight the user you want and click **Select**.
6. Select the appropriate role for this user and click **Add**.

7. The functional stations available to the administrator display on the left. To narrow the choices available:

   a. Type a station number in the **Filter** box.

   b. Click **Filter**.

   c. Select the appropriate stations.

   d. Click **Add**.

8. When you have all the choices you want for this user, click **Submit**.

16.7 Reconciling Patients

Reconciling patients is a function of the National, Regional, and Local Administrators.

While attempting to load new patients into OHRS or update existing patients within OHRS with new or updated data received from the PAID, VSS, or Patient Import load process, OHRS may encounter a potential duplicate patient that needs to be reconciled. OHRS identifies potential duplicate patients when it attempts to load a patient record when:

- OHRS finds more than one patient record in the OHRS system that matches *all* of the following data of the PAID record on file:
  - o Social security Number (SSN)
  - o Last Name
  - o First Name
  - o Date of Birth (DOB)
  - o Gender
- OHRS finds more than one patient record in the OHRS system that matches the SSN of the PAID record on file.
- OHRS finds a patient record in the OHRS system that matches all of the following data of the patient record in the load:
  - o Last Name
  - o First Name
  - o DOB
  - o Gender
- OHRS finds more than one patient record in the OHRS system that matches all of the following data of the patient record in the load:
  - o Last Name
  - o DOB

The OHRS Patient Reconcile process allows you to:

1. Update existing patient demographics information in the OHRS system with the new information from the load process (PAID/VSS/Patient Import) that appeared on the first column in the "Patient Reconcile" page.

OR

2. Determine that the existing patients on the OHRS system are not the same person, and create a *new* patient record in OHRS for the patient from the Load process.

NOTE: You *must* have the appropriate security privileges to perform the Reconcile Patients function. If you do not, the option does *not* appear.

16.7.1 Review Patients to be Reconciled

To review the patients that need to be reconciled, perform the following procedure:

1. From the main **Menu**, select **Administration**.

2. From the **Administration** menu, select **Reconcile Patients**.

   - The potential patient records to be loaded into OHRS from the PAID/VSS/Patient Import databases are displayed at the top.

   - The records in the bottom view represent the patients already established in OHRS that are potential matches.

3. On the top table pane, select a patient to see the details. The potential matches that already exist within OHRS are displayed at the bottom.

Figure 61. OHRS—Reconcile Patients page: Potential duplicate records

4. Click **Reconcile** to display patient detail information.

5. Review these patient information details and determine if they are the same person in the Patient Reconcile page (Figure 62).

Figure 62. OHRS—Reconcile Patients page: Reviewing potential duplicate records

The detail information on all the potential matches is displayed in columns after the first column. It is possible to have more than two columns if OHRS found multiple patient records that matched the patient record from the load, which is always displayed on the first column on the "Patient Reconcile" page.

In the example in Figure 62:

- First Column—Patient information received from the PAID data source.

- Second Column—Patient information that already exists within OHRS that matched the following data of the PAID record from the load in the first column:

  o Last Name

  o First Name

  o DOB

  o Gender

- First Row: "Data Source"—Identifies where the patient information is currently hosted.

6. Reconcile the patient from the load with an existing patient in OHRS system on the "Patient Reconcile" page.

16.7.2 Reconcile Patient Records

To reconcile the patient information from the load to an existing matched OHRS patient record if they are the same person, perform the following procedure:

1. Click the **Match with this patient** button for the OHRS patient that you would like to reconcile.

   ℹ️ **NOTE:** If you wish to ignore the incoming record and to *not* perform any updates of the patient data in OHRS, you can click the **Take No Action** button. This removes the incoming record from the reconcile list and does *not* perform any updates to the patient data in OHRS.

2. OHRS displays a popup a confirmation page that asks the following question:

   "Are you sure you want to reconcile the selected patient?"
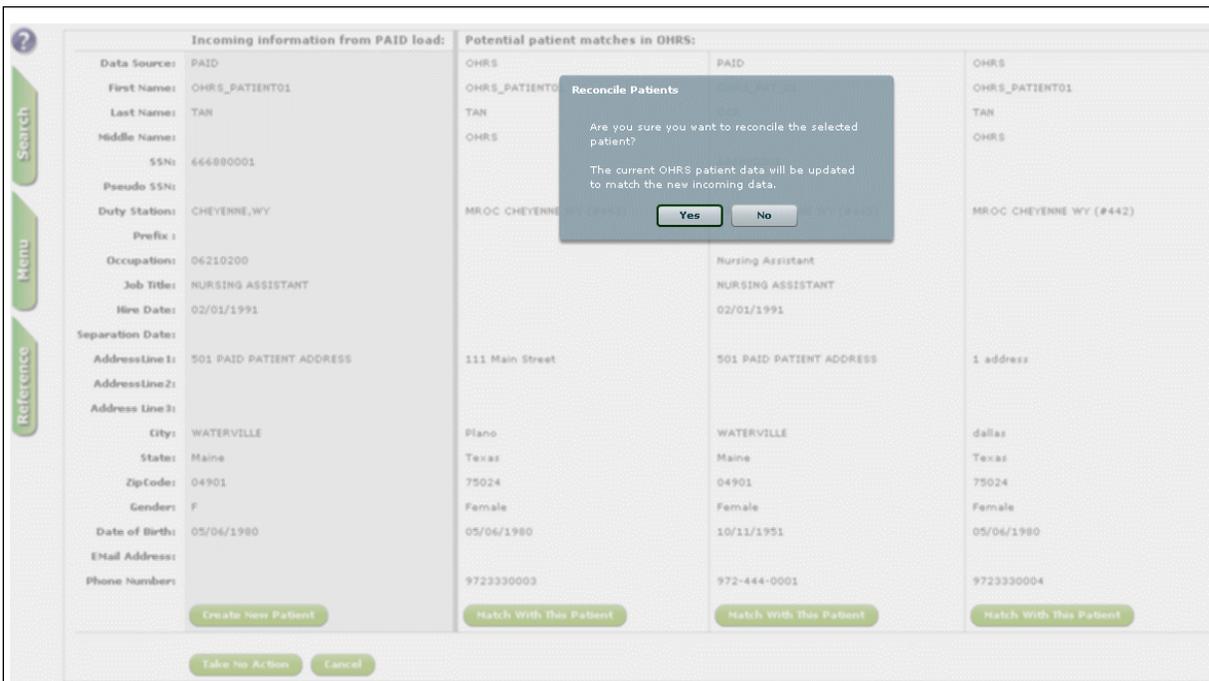
3. Determine reconciliation action:

   - Click **Yes** if you want to proceed with the reconcile action.

   OR

   - Click **No** if you do *not* want to proceed with the reconcile action.

Figure 63. OHRS—Reconcile Patients popup confirmation dialogue

4. Once you click **Yes** on the "Reconcile Patients" confirmation page:

    a. OHRS reconciles and replaces the existing OHRS patient information with the patient record from the load.

    b. OHRS displays the following message on the page once the reconcile process has completed:

    "Patient reconciled successfully."

16.7.3 Create a New Patient Demographic

To create a new patient demographics record from the patient information on the load without reconciling with an existing matched OHRS patient record if they are not the same person, perform the following procedure:

1. Click the **Create New Patient** button for the patient from the load in the first column.

2. OHRS displays a popup a confirmation page that asks the following question:

    "Are you sure you want to create a new patient?"

3. Determine new patient action:

    - Click **Yes** if you want to proceed with creating a new patient.

    OR

    - Click **No** if you do *not* want to proceed with the create action.

4. Once you click **Yes** on the "Create Patient" confirmation page:

    a. OHRS creates a new patient demographics record with the data from the load process (PAID/VSS/Patient Import).

    b. OHRS displays the following message on the page once the create patient process has completed:

    "Patient created successfully."

    If the patient information matches existing patient identity traits (SSN, Last Name, First Name, Date of Birth, Gender) in the OHRS system during the Create Patient process, OHRS displays an error message indicating that:

    "Patient not created as patient with matching identity traits already exists in the system."

You can also get to the "Reconcile" page while viewing the alerts for your station.

REF: For more details on how to view the alerts, see the "Working with Alerts" section.

1. In the "Alerts" page, select an alert that indicates the following:

    "The PAID and/or the VSS data processing has identified potential duplicate patients."

2. Click **View** to display the "Reconcile Patients" page.

16.8 Working with Reference Data

This feature allows you to create, view, and update reference data used within the OHRS application. Reference data is the standard data that is stored and used within the OHRS application, often via a drop-down or selection list. An example of reference data is the list of Other Federal Agencies (OFA) available on Patient Demographics and OFA reports.

You can add and update data within the OFA reference table.

NOTE: Delete/Inactivate and other tables will be available in future functionality.

You can use the current **Administration** menu and the **Manage Reference Data** menu option, to create new entries and update entries in any pre-defined reference data table.

NOTE: You *must* have the appropriate security privileges to access the Manage Reference Data menu option. If you have the **Update Reference Data** permission, you can perform all Manage Reference Data functions.

As an authorized user, you need to be well trained on how the reference data is set up and aware of all the areas of the OFA reference table that are used within the OHRS application *prior* to modifying the data.

To access Reference Data, perform the following procedure:

1. Select the **Menu** tab.
2. Select **Administration**.
3. Select the **Manage Reference Data** menu option. A new page opens with a **Reference Type** drop down list containing the available reference data tables.
4. If you are an authorized user, from the **Reference Type** drop-down list, select the reference table that contains the reference data you wish to modify. For example:
   - Other Federal Agencies
   - Patient Types
   - Respirator Manufacturer
5. After making a selection, a grid containing the actual data table rows displays.

   If no data exists in the database, the following message displays:

   "No data present in the selected table"
6. You are now able to add new data or update existing data in the table:
   - Select **Submit** to save your changes and propagate them throughout OHRS.
   - Select **Cancel** to exit.

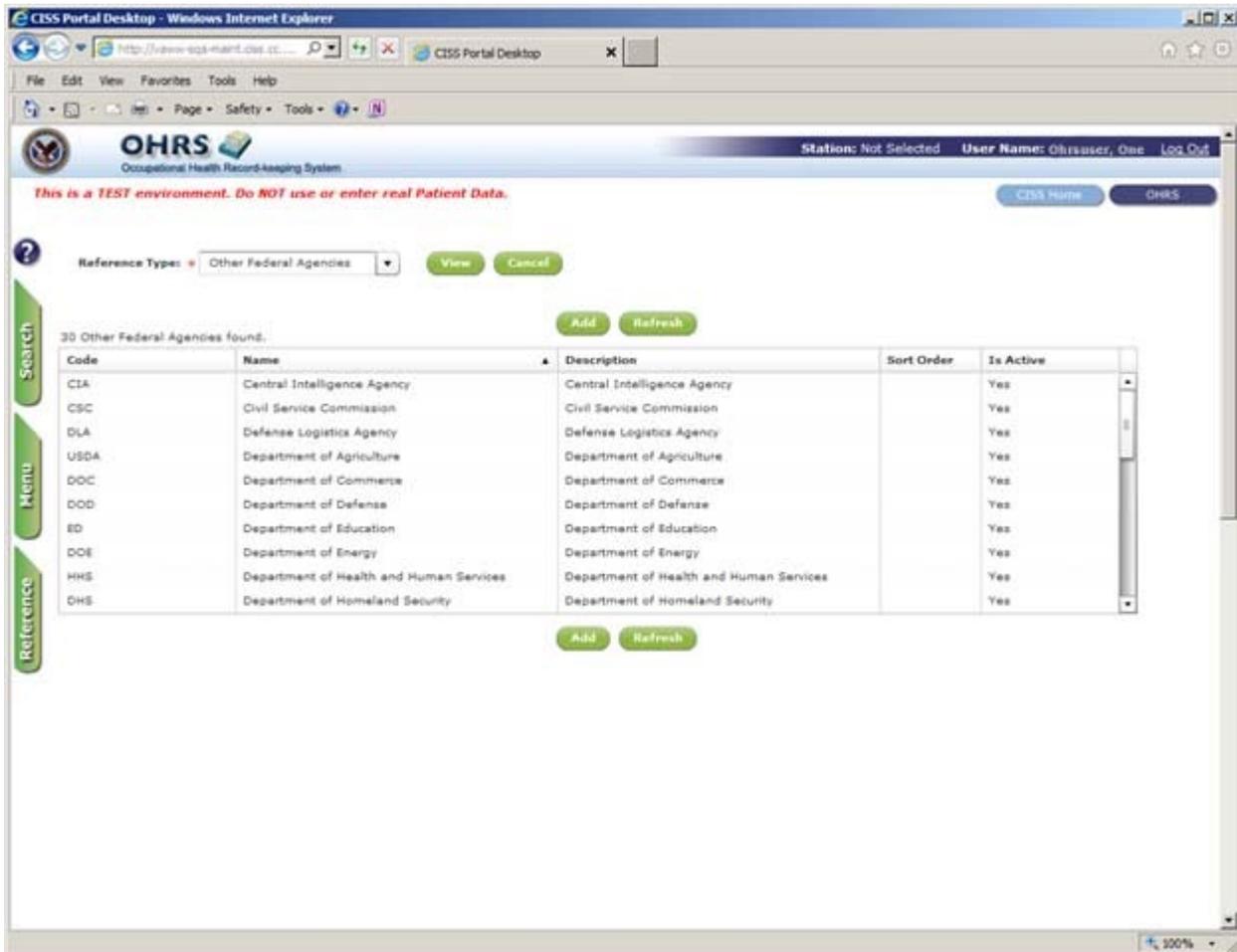**Figure 64. OHRS—Selecting a reference table (e.g., Other Federal Agencies)**

Figure 65. OHRS—Adding reference data to an existing table (e.g., Other Federal Agencies)
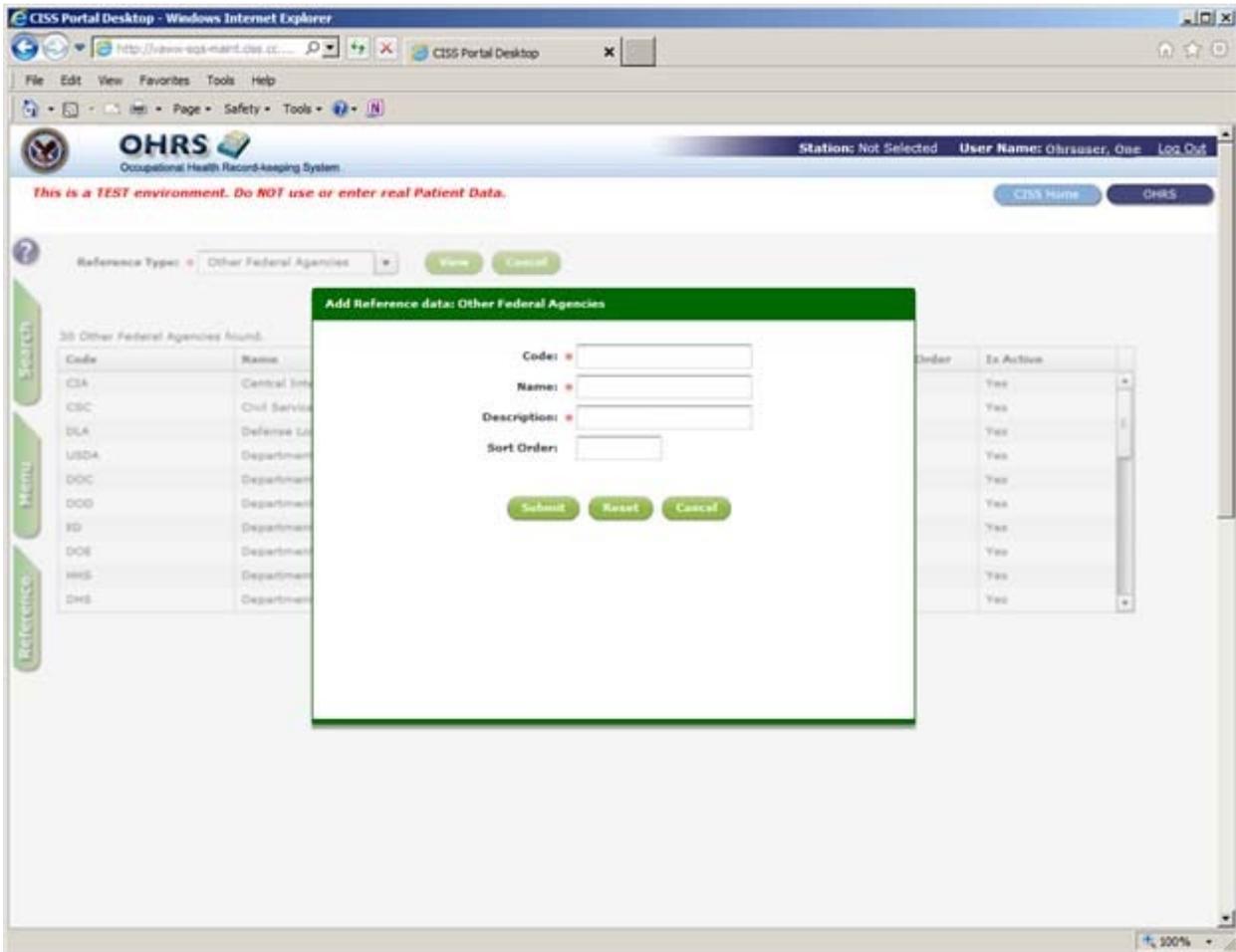
17 Frequently Asked Questions (FAQ)

Q: How do I enter the date in the date field?

A: You *must* enter the date in mm/dd/yyyy form or you can use the calendar method.

Q: Why is my signature code not working?

A: Are you using the correct duty station?

Did you use the correct signature code?

If you continue to have problems, contact your Administrator.

Q: Why can't I get to Manage System User?

A: Only the Administrator has the Manage System User function.

Q: Why am I receiving an error when I enter my signature code?

A: If you have entered an invalid signature code you receive the following error:

"Electronic Signature Code is incorrect. Please re-enter."

Entering the correct signature code resolves this error.

If you have forgotten your signature code, contact your administrator.

18 Reference Material

18.1 Technical Service Project Repository

Additional Clinical Information Support System (CISS) documentation is available on the Technical Service Project Repository (TSPR):
http://tspr.vista.med.va.gov/warboard/anotebk.asp?proj=1256&Type=Active

18.1.1 Security within OHRS

18.1.1.1 Security

CISS-OHRS leverages security that has been implemented throughout the VA Enterprise, such as ActiveDirectory, and is aligned with the Office of Information and Technology (OIT) Common Services direction for security.

VA Enterprise security is detailed in VA Handbook 6500, which can be found at:
http://www1.va.gov/vapubs/

CISS-OHRS was developed to be in compliance with the Privacy Act of 1974, HIPAA, and Section 508.

Glossary

Term	Definition
Addendums	Extra information added to an encounter.
Adverse Reaction Reports	Reports that track detailed information on patients who have had an adverse reaction to some medication and therefore have an encounter created for them in OHRS.
Alerts	Alerts are system-generated messages that provide information. Alerts are either Informational or Actionable. You must have the appropriate security access to view alerts.
Assessment	Within the Medical Surveillance encounter, there is an Assessment tab where you can collect the following patient information regarding Medical Opinion: • Further evaluation needed • Medically cleared • Medically cleared with restrictions • Medically not cleared.
Banner	The graphical area that displays the Department of Veterans Affairs logo, the parent system, which is the Clinical Information Support System (CISS), and the name of the partner application (OHRS, Occupational Health Record-keeping System). It also includes photos of typical VA employees or clients.
CISS	The Clinical Information Support System (CISS) is a web-based portal application that provides a central interface for users to access information and applications necessary for their role.
Content Area	The section of the page where you see explanatory text, and where all input, viewing, and OHRS tasks are performed. If there are error messages to your input, they display here. There are also links, which look like buttons, to CISS Home and to the OHRS application in the Content Area.
Context Bar	The dark blue banner at the bottom of the Banner that shows the user's duty station, user name, and log out link. There are also buttons of the applications that the user has permissions to use. If the user is an administrator, they can sign on with no duty station specified until they begin to perform the functions they have authorization to do.
Demographic Information	Demographic information includes name, address, phone, email, and emergency contact information for a patient.
Duty Station	A location where a person is based (typically, it is where a person receives a paycheck). It may be a place where health care is not provided, such as a national cemetery or an office building.
Duty Status Reports – WorkAbility	This report displays information on employees with the Recommended Duty Status of Return to Duty No Restrictions, Return to Duty With Restrictions, and Off-Duty. If there is an outbreak of flu, the facility needs to know who can work full time, who is off work, and who can work in a limited capacity. This

Term	Definition
	ability to work equates to "Recommended Duty Status." This report can be detailed or summary, and can be localized to the local area, VISN (Region), or the nation.
Electronic Signature/E-signature	Your e-signature is a secondary level of authentication and carries the same legal responsibilities as your written signature. It works in addition to your password to identify you. You *must* enter your e-signature when you confirm the encounter data that you enter.
Encounter	Encounters are times when a patient is treated or evaluated by medical staff.
Footer	The Footer is displayed at the bottom of every page. It displays the version of the application, the copyright date, and a link to contact the application owners.
Functional Station	A location where health care is provided (a treating facility), such as a VA Hospital/Medical Center or clinic.
Immunity Status Report	This report looks at the most current immunization status in the patient record for the selected vaccine and determines if patient is immune by the vaccination parameters (by vaccination, by history, etc.), or is susceptible by other parameters (vaccination refused, etc.). It can be a detailed or summary report. Only closed vaccination encounters are included in this report.
Infectious Disease Exposure Report	This report displays information about patients who have been exposed to a specific infectious disease and lists if they have used protective equipment, such as a mask or respirator. It can be a summary or detailed report and can be localized to the local area, VISN, or the nation.
Infectious Disease Surveillance Report	This report displays information about patients with suspected, probable, or confirmed cases of a specific infectious disease. It can be a summary or detailed report and can be localized to the local area, VISN, or the nation.
IRM	Information Resource Management
Medical Surveillance Clearance Report	This report displays if a patient is medically cleared to work with a respirator or not. It can be a summary or detailed report and can be localized to the local area, VISN, or the nation.
Menu	The list of items on the left side of the page. The Menu displays the actions that are available to you, based on your role.
Notifications	Notifications are a text-based electronic messages linked to a patient encounter. They are messages that providers communicate regarding a patient's WorkAbility status (i.e., the patient is or is not available to work), reminders to a patient to return for follow-up care, etc.
OHRS	OHRS (the Occupational Health Record-keeping System), is the initial CISS partner system. It is a web-based application that enables occupational health staff to create, maintain, and monitor medical records for VA employees and generate national, VISN, and site-specific reports.

Term	Definition
OHRS User Access Tracking Report	This report displays information about end users of the OHRS system, including data about their login activity. It can be only a summary report and can be localized to the local area, VISN, or the nation. Only local, regional, and national administrators can run this report.
Other Federal Agency Vaccination Status Report	This report displays the vaccination status of patients who belong to Federal Agencies other than the Veterans Administration. It can be a summary or detailed report and can be localized to the local area, VISN, or the nation.
PAID	Personal and Accounting Integrated Data
Pandemic Influenza Encounter	The pandemic influenza encounter is used to document screening and treatment for pandemic influenza. It is to be used in the event of an outbreak to track exposures, determine who is at risk, and in what capacity they may work.
Patient Cover Sheet Pods	The Patient Cover Sheet pods are clickable pieces of content on the Cover Sheet tab which allow you to quickly view important high-level patient information.
Quick-Load Vaccination Function	The Quick-Load Vaccination option allows you to enter multiple encounters quickly during the time you are vaccinating several people at a time.
Remedy Ticket	A support request that is sent to the VA Enterprise Service Desk (ESD).
Respirator Fit Test and Training Report	This report displays information about patients' respirator fit test and training results. It can be only a detailed report.
Respirator Fit Test Report	This report displays information about patients who passed the respirator fit test. It can be only a summary report and can be localized to the local area, VISN, or the nation.
Risk Profile	Displays the risk profile for a patient, and every OHRS patient *must* have a risk profile created. The risk profile indicates how often a patient *must* be evaluated for the designated risk.
Role-based Access	The level of access to data and functions in CISS-OHRS varies depending on job function.
Section 508 Compliance	Applications that are Section 508 compliant can be used with assistive technology software.
SOAPE Tabs	There are tabs within the Encounter tab itself that require data entry when you are creating a new encounter, regardless of the Encounter Type. The tabs are named: Subjective, Objective, Assessment, Plan, and Encounter Codes.
SP	Service Pack
User Profile	A user profile is called My Profile and is accessed from the left menu bar. It contains user information such as the user's role.
Vaccination Encounter	The Vaccination Encounter is used to document vaccination against pandemic influenza. OHRS has the ability to report the vaccination and immunity status of employees and others as well as their ability to work.

Term	Definition
Vaccination Rate Report	This report shows the percentage of patients who are vaccinated or not vaccinated for a specific vaccine. If a patient does not have an immunization history in the system, they are considered unvaccinated for purposes of this report. It is a summary report only, but can be localized to the local area, VISN, or the nation.
Vaccination Status Report	This report displays a patient's vaccination status, which can be either vaccinated, not vaccinated, or vaccination in progress. Rules are different for every vaccine. You can run the report against only one vaccine at a time. This report can be a summary report or a detailed report and can be localized to the local area, VISN, or the nation. Only closed vaccination encounters are included in this report.
VHA	Veteran's Health Administration
VISN	Veterans Integrated Service Network
VSS	Voluntary Service System
Work Profile	The work profile shows information about where the patient works, their job code, job title, and provides supervisor information.
WorkAbility	WorkAbility information is that which allows supervisors or other OHRS personnel to see whether or not a particular OH patient (employee, volunteer, provider, etc.) is able to work and if they have any restrictions.

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