Zynx Health AuthorSpace Help File

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Using This Document

Printing

This document is provided in Adobe® Portable Document Format (PDF). PDF files are compact and can be downloaded, viewed, navigated, and printed exactly as they appear using Adobe® Reader®. The document can be printed in whole or in parts. To print this document, complete the following steps:

1. On the AuthorSpace home page, click on "Help" in the top-left section.
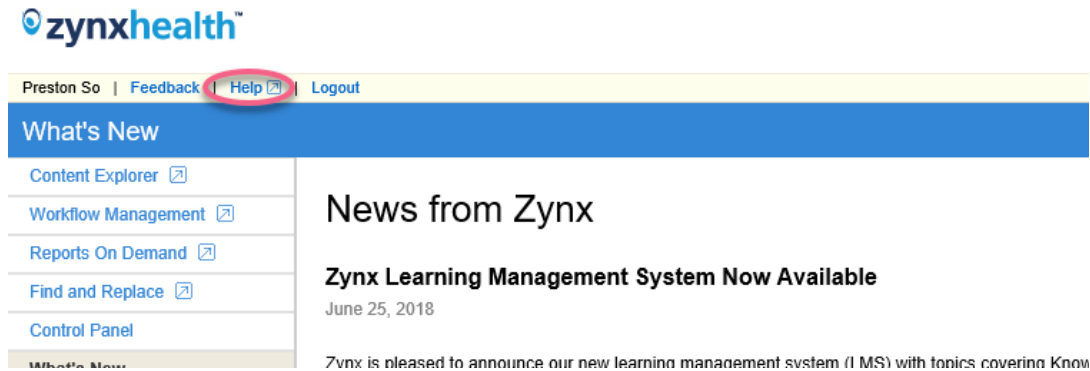
2. Click on the "PDF" link at the top-right of the page.
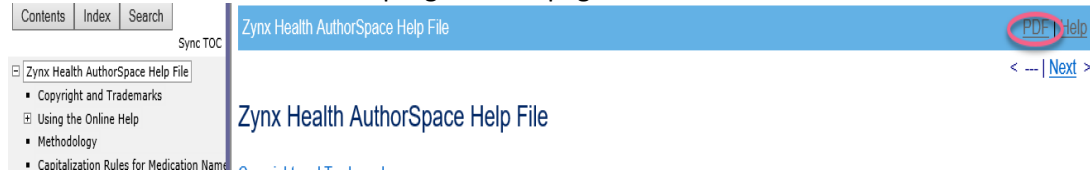
3. Select Print icon on the top right or press "CTRL+P" on your keyboard.
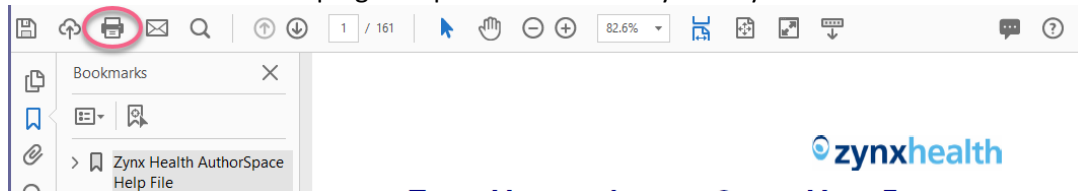
   The Print dialog box appears.

4. In the "Printer" section, select "Microsoft Print to PDF". If you would like to print the whole document, leave the "All" radio button selected in the "Pages to Print" Section. If you would like to select a range of pages to print, select the "Pages" radio button and specify the desired range.
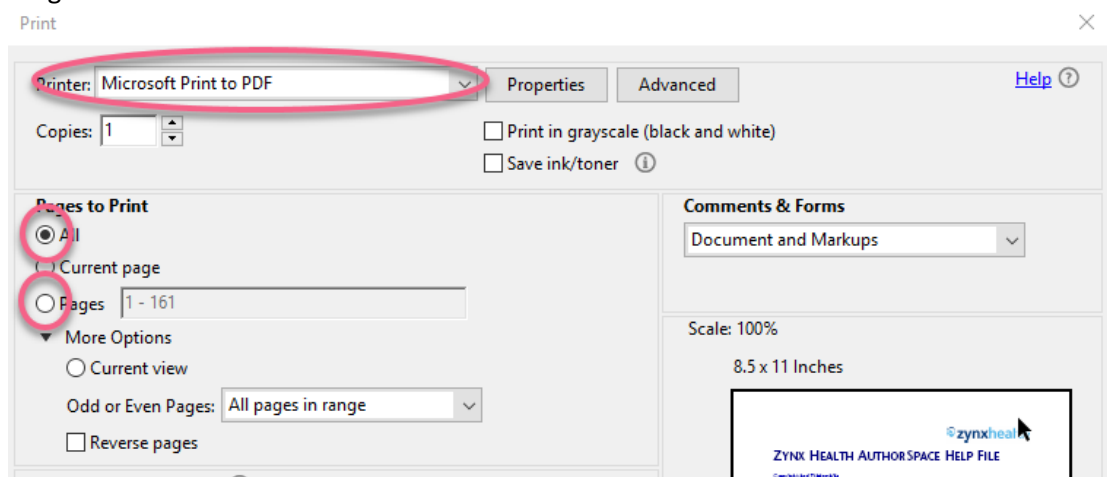
To avoid printing all pages, be sure to enter a range of pages in the Print Range section. To maximize the appearance and usability of your printed copy, select two-sided book printing, if available.

5. Click **OK** to print.
6. A "Save Print Output As" dialog box will appear. Create a name for the document, select where you would like to save the document, make sure "Save as type" shows "PDF Document (*.pdf)," and then click "Save."
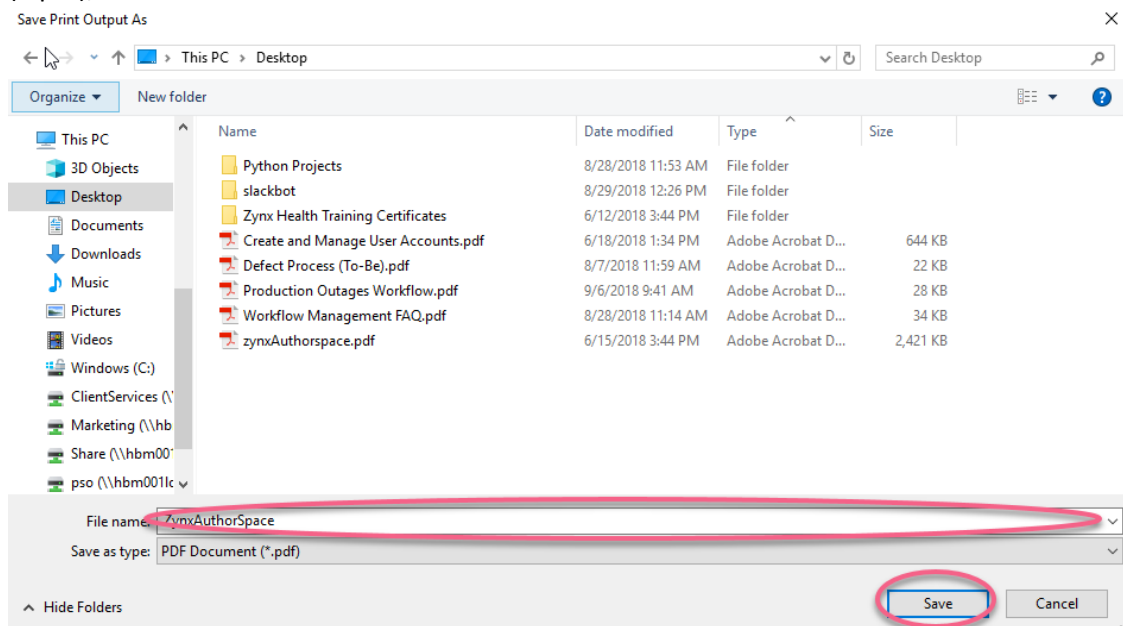
The PDF document has now been saved onto your machine.

Methodology

Separate Methodology pages exist for each of the following products:

- ZynxCare™ (https://www.zynx.com/Reference/content.aspx?ItemID=40887)
- ZynxOrder™ (https://www.zynx.com/Reference/content.aspx?ItemID=40889)

The Methodology pages describe the selection and review process used by Zynx Health to determine what literature is included in the evidence topics and what items are included in the order sets and plans of care. The pages describe the databases searched, the primary search inclusion and exclusion criteria, strategies for selecting literature when there is an abundance of material on a given topic, categorization scheme, editorial process/quality control, update frequency, the Zynx Health classification system for rating the strength of the evidence, and additional information related to the specific content.

Capitalization Rules for Medication Names

The following capitalization rules apply to medication names:

- When applicable, look-alike and sound-alike medication names are displayed using "tall man" lettering in compliance with recommendations from the U.S. Food and Drug Administration and the Institute for Safe Medication Practices (www.ismp.org/Tools/tallmanletters.pdf) e.g., vinBLAStine and vinCRIStine.
- Proprietary medication names (brand names or trade names) appear in all uppercase: e.g., TYLENOL.
- Nonproprietary medication names should appear in all lowercase: e.g.,atenolol. Nonproprietary medication names are used whenever possible.

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System Requirements for AuthorSpace and ViewSpace (Client Environments)

This section lists system (hardware/software) recommendations for client environments when using AuthorSpace and ViewSpace.

Supported Operating Systems and Browsers

Other System Recommendations

Hardware Requirements

Supported Operating Systems and Browsers

	Windows 7 (32/64-bit)	Windows 8***	Windows 10	Mac OS 10.3
Chrome				
Internet Explorer 8 - 10				
Internet Explorer 11	AuthorSpace ViewSpace	AuthorSpace ViewSpace	AuthorSpace ViewSpace	
Microsoft Edge				
Firefox	ViewSpace	ViewSpace	ViewSpace	
Safari				ViewSpace

	Not Supported
	Not Applicable

Other System Recommendations

- Adobe Reader

Version	Windows 7 (32/64-bit)	Windows 10
Adobe Reader 8		
Adobe Reader 9	9.5	
Adobe Reader 10	10.1.16	
Adobe Reader 11	11.0.23	
Adobe Reader DC	18.011.20038	18.011.20038

	Not supported

- IE settings:
  - JavaScript is enabled
  - Cookies "on"

- Screen resolution:
  - 1024 × 768 or higher

Hardware Requirements

- Processing power:
  - Recommended: $\geq$ 2.33 GHz
  - Minimum: 1 GHz

- Memory:
  - Recommended: 4 GB RAM
  - Minimum: 2 GB RAM

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Optimal Settings for Internet Explorer

Microsoft Internet Explorer is currently the only browser supported by Zynx for use with the AuthorSpace application. Internet Explorer 11 is recommended. We do not support Microsoft Edge. This section contains information on how to configure Internet Explorer settings for optimal use for AuthorSpace.

Determining Your Version of Internet Explorer

Checking for New Versions of Stored Pages

Configuring Pop-up Blocker Settings

Adding zynx.com to Trusted Site List

Determining Your Version of Internet Explorer

To determine your version of Internet Explorer, select ⚙ > **About Internet Explorer**.

Checking for New Versions of Stored Pages

Be sure that Internet Explorer is set to check for newer versions of stored pages:

1. Select ⚙ > **Internet Options** from the Internet Explorer menu bar to open the Internet Options dialog box.
2. In the **Browsing history** area on the **General** tab, click the **Settings** button. In the **Check for newer versions of stored pages** area, select any option except **Never**. It is recommended that you select the **Automatically** option to ensure that Internet Explorer is accessing the most current version of a page without significantly slowing down performance.
3. Click the **OK** button to close the Settings dialog box.
4. Click the **OK** button to close the Internet Options dialog box.

Configuring Pop-up Blocker Settings

Configure pop-up blocker settings for www.zynx.com and www.zynxhealth.com:

1. Select ⚙ > **Internet Options** from the Internet Explorer menu bar to open the Internet Options dialog box.
2. Click the **Privacy** tab.
3. In the Pop-up Blocker area, click the **Settings** button.
4. Type www.zynx.com in the **Address of website to allow** box and click the **Add** button.
5. Type www.zynxhealth.com in the **Address of website to allow** box and click the **Add** button.
6. Click the **Close** button to close the Pop-up Blocker Settings dialog box.
7. Click the **OK** button to close the Internet Options dialog box.

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Adding zynx.com to Trusted Site List

Add https://www.zynx.com to the trusted site list to avoid issues that may occur when trying to print or export content. Exports to XML, RTF, etc., may get blocked if https://www.zynx.com is not on the trusted site list.

1. Select ⚙ > **Internet Options** from the Internet Explorer menu bar to open the Internet Options dialog box.
2. Click the **Security** tab.
3. In the **Select a zone to view or change security settings** area, click the **Trusted sites icon**.
4. Click **Sites**.
5. Type https://www.zynx.com in the **Add this website to the zone** box.
6. Click the **Add** button.
7. Click the **Close** button to close the Trusted Sites dialog box.
8. Click the **OK** button to close the Internet Options dialog box.
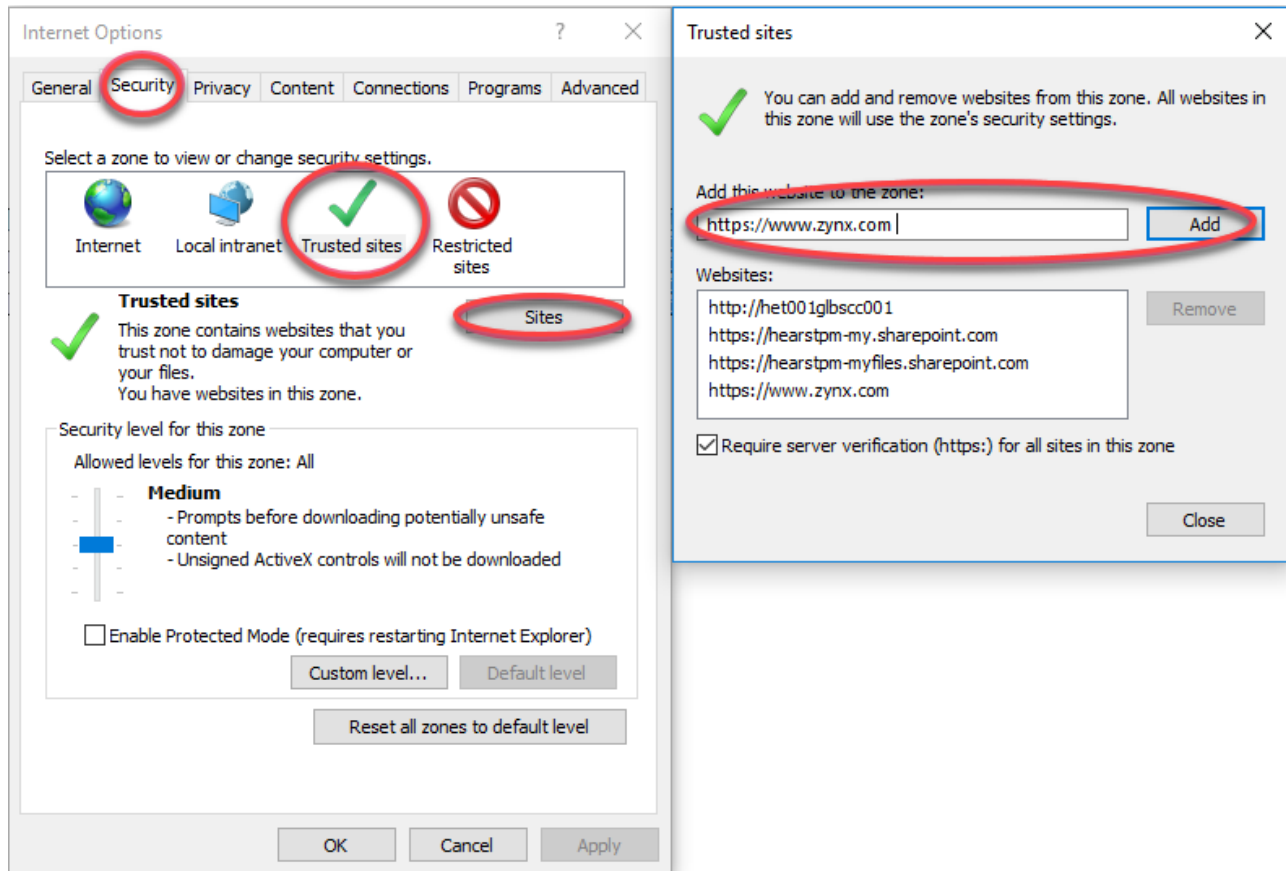
AuthorSpace

AuthorSpace provides a dynamic authoring environment that enables users to build and export content (such as order sets, linkable content, and plans of care) in formats that can be integrated into different hospital information systems. AuthorSpace also enables users to interact with external vocabularies to create content that is compatible with other systems. This documentation provides the following information:

- Security Considerations
- Overview of AuthorSpace
- Managing Your Environment
- Working with Order Sets
- Working with Plans of Care in ZynxCare
- Working with Vocabularies

Security Considerations

Environment administrators set up and maintain application users, user permissions, teams, and team access privileges. Administrators will not be able to see the passwords of users within their environment but will be able to unlock accounts and reset passwords.

Administrators should contact a client services representative if they need assistance adding users to their account.

Users should take the following into consideration when logging in to AuthorSpace.

User Passwords
Passwords must contain at least one of each of the following:

- Lowercase letters (a-z)
- Uppercase letters (A-Z)
- Numbers (0-9)
- Special characters (!, @, #, $, %, ^, &, *, ?, _, ~, :, ;)

Passwords cannot contain any of the following words:

- password
- evidence
- zynxguest
- zynxhealth

Passwords expire every 90 days and are encrypted.

Login Attempts

After 3 unsuccessful login attempts, accounts will be locked. To unlock the account, users can click the appropriate link from the login page.

Resetting Passwords

Users can reset their own passwords by clicking the appropriate link from the login page to request a temporary password. Users are required to change the temporary password the next time they log in.

Autologin

Autologin allows users to access evidence links without an AuthorSpace user name and password. Please contact your client services representative if you would like to configure your account for autologin. You will need to provide your organization's IP address(es) to set up autologin.

Overview of AuthorSpace

The following items appear in the **Main Menu** on the left side of the screen:

- Content Explorer
- Workflow Management
- Reports on Demand
- Control Panel
- What's New

Content Explorer

Click **Content Explorer** to view Zynx default content as well as content owned and created by the user's local environment. Content folders appear on the left side and contains the following folders:

- The "Zynx" folder contains Zynx default content organized by modules (i.e., clinical conditions or procedures) that are licensed by the users account. For example, the ZynxOrder Order Sets folder > Acute Myocardial Infarction/STEMI folder contains order sets associated with the Acute Myocardial Infarction/STEMI module. Depending on what you are licensed for, you may see any of the following folders:

  - **ZynxOrder Order Sets**: Contains Zynx default order sets for the inpatient setting. See Working with Order Sets.
  - **ZynxCare Plans of Care**: Contains Zynx default interdisciplinary plans of care for the inpatient setting. See Working with Plans of Care in ZynxCare.

The "Our Content" folder contains content owned and created by users in your environment. The organization of the content is specific to your environment. The folder is named "Our Content" by default. The administrator can change the name of the folder by double-clicking on the folder name. Content can be order sets, plans of care, or linkable content.

The following information is shown for each folder's content:

- **Type**: Identifies the type of retrieved content as an order set, linkable content, or plan of care. Content published to ViewSpace appears with the 🖥 icon next to it. Content is published to ViewSpace in the Content Manager. See Managing an Order Set With the Content Manager and Managing a Plan of Care With the Content Manager. To view content of a specific type (Our Content folder only), hover the mouse over the "Type" and click on the downward arrow that appears on the right. A list should appear with "sort ascending", "sort descending", and "filter". Hover the mouse over "filter" and another list should appear with radio boxes of filterable content types. Select the boxes of the content you would like to view. Filtering for the "Status" column is done in a similar way.

- **Content Title**: Identifies the name of the content.
- **Status**: Indicates the state of the content. The following statuses are valid:

  - **Draft**: The content has not been released and can be modified.
  - **Review**: The content is being reviewed. The content cannot be edited in Review status.
  - **Released**: The content has been released.
  - **Retired**: The content has been superseded or retired and should not be used.

- **Version**: The version assigned to Released content is displayed in a gray font next to the Content Title. See Versioning Order Sets and Versioning Plans of Care.

  > A version number is not assigned until the content is Released, so for content in a Draft or Review state, use naming conventions to help identify the version if necessary. Released content cannot be edited without changing the version number. If you choose Released content for editing, you will be prompted to create a Draft version, and a new version number will be assigned when that Draft is Released.

To sort content in ascending or descending order by Type, Our Content, Status, or Version, click in the appropriate column header. If you have more than one page of content, page through the content using the page numbers and arrows.

Workflow Management

Click **Workflow Management** to access the Workflow Management application. Here, we will give an overview of Workflow Management and how to use it.

- Workflow Management Overview
- Creating Workflows
- Assigning and Activating Content
- Tracking Progress
- Completing Workflow Steps
- Managing Users and Reviewers
- Preparing Distribution Lists/Contacts from Outlook for Upload into Workflow Management
- Import E-mail and Distribution List from Workflow Management
- Editing Workflows

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Workflow Management Overview

The **Workflow Management** application in AuthorSpace gives you the ability to automate and track the workflow process for adding or modifying content in your environment. With Workflow Management, you will be able to:

- Define workflow steps for the approval process
- Identify content associated with each workflow
- Assign resources, duration, and start dates for each of the approval steps
- Automatically generate Welcome e-mails to the assigned resources to let them know that they have a task to perform
- Monitor and report on the progress in approving each piece of content
- Modify active workflows to match changes in resources or schedule
- Reuse a workflow the next time you want to review content, making modifications to any part of the workflow definition as needed

For each piece of content in review, when one step in the process is completed in Workflow Management, the next step in the process automatically starts.

With Workflow Management, you will no longer have to rely on spreadsheets, send e-mails, and make phone calls to find out where you are in the process. Issues in the process are immediately identified so you can, if necessary, take corrective action.
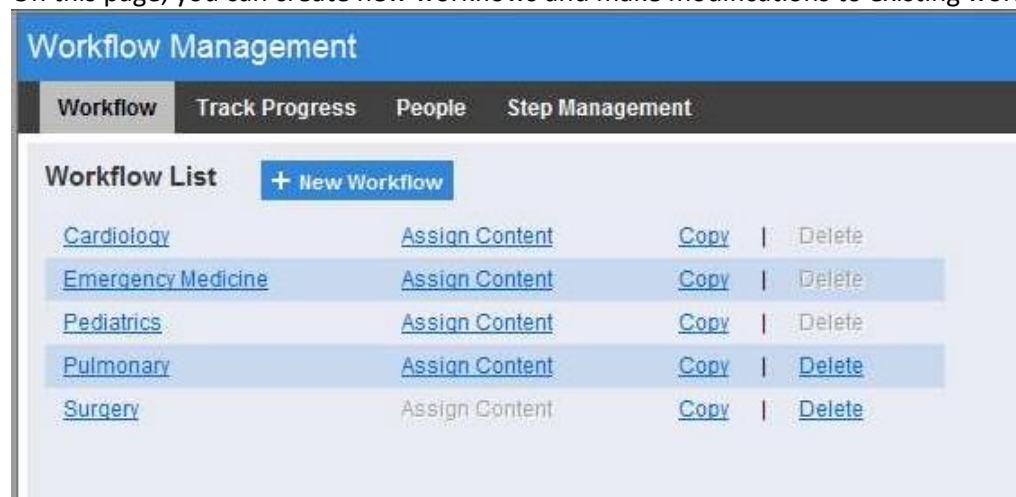
Creating Workflows

On the Workflow List page, you can perform any of the following actions:

- Add a new workflow
- Edit an existing workflow
- Copy an existing workflow to create a new workflow
- Assign content to an existing workflow that has all required fields defined
- Delete workflows that do not have activated content

Workflow List

When you launch Workflow Management from AuthorSpace, the first page you see is the **Workflow** tab. On this page, you can create new workflows and make modifications to existing workflows.

Click **+ New Workflow** to create a new workflow. Open an existing workflow by clicking on the workflow name. Hospital Administrators or Environment Managers or Administrators will be able to create and edit workflows. Other AuthorSpace users can only view the workflow definition.

Workflow Definition

When you create a new workflow, you are presented with a blank workflow definition page with the fields Workflow **Name** and **Notes**, and a grid that initially displays four blank workflow steps. Enter a unique workflow name to describe the workflow. A workflow name is required. Notes are optional

Workflow Steps

For each step in the workflow, enter a step name and duration. The step name must be unique for this workflow. Duration is for calendar days, including weekends and holidays. If your process requires more than 4 steps, click **+ Add a Step**.

There's no limit to the number of steps in a workflow. Click **Save** to save additions and changes you have made to the workflow. When you click Save, missing elements are indicated in a message on the page and any step that has no information will be removed from the Step grid.

Assign Users and Step Owner

For every step, you will need to assign at least one AuthorSpace User or ViewSpace Reviewer. There is no limit to the number of people you can assign to a step.

Click **Assign People** to bring up the **Assign People to Step** page. After adding a person to the step, the link on the step changes from Assign People to Edit People.
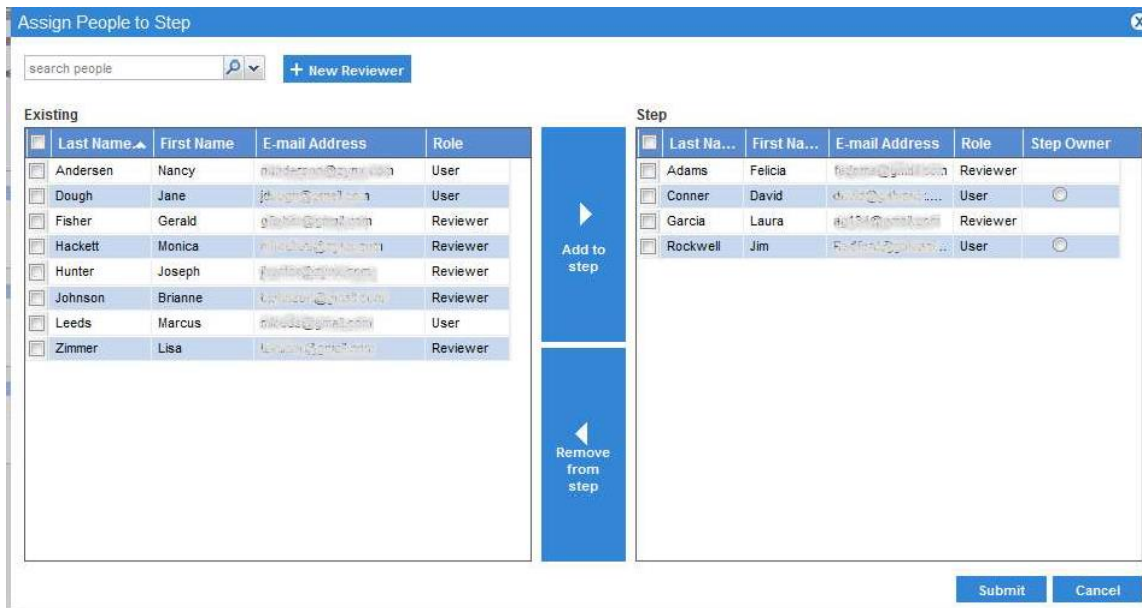
If the Reviewer you are looking for has not been defined, you can create the person here.
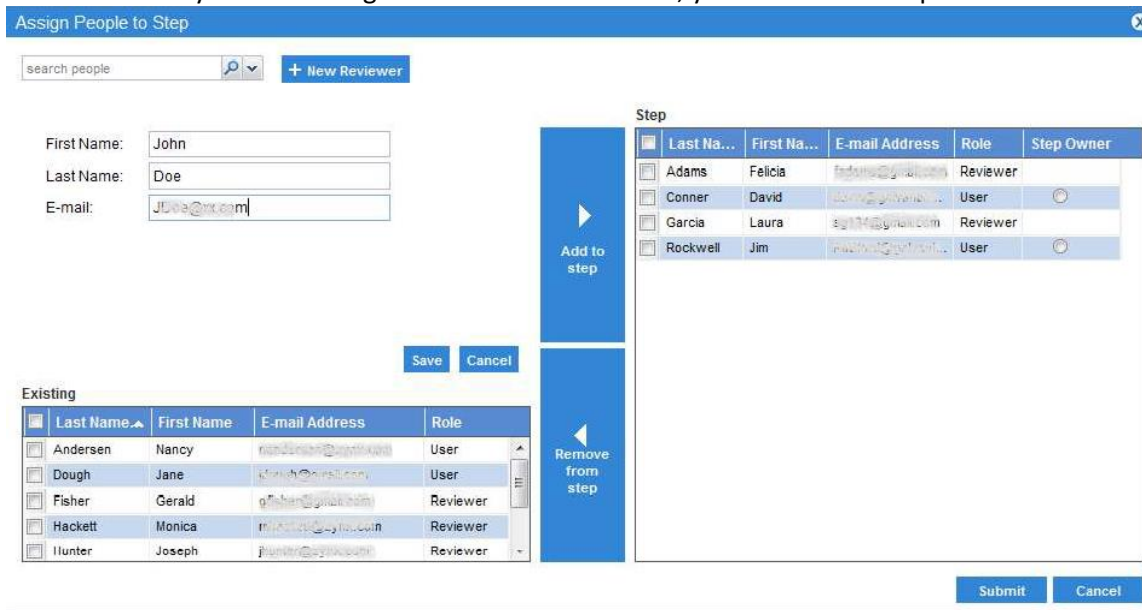
You can optionally designate an AuthorSpace User as the **Step Owner**. This person will have the authority to indicate that the content has completed this step. Hospital Administrators or Environment Managers or Administrators can complete steps without being designated as a Step Owner.

Welcome Memo

When a step starts, the assigned Users and Reviewers can receive an e-mail listing the content that they have been assigned. The **Welcome Memo** in the workflow step allows you to define a customized subject and message. Standard text formatting is available when creating your Welcome Memo. In the welcome e-mail, your message will appear before the content list when the content has started this step. Welcome Memos are optional but required for an email to be sent out.

Completing the Workflow Definition

Before you can assign content to a workflow, all required fields must be filled in. For each step, the required fields are: **Step Name**, **Duration**, and **Assign People**.

At any time while creating a workflow, you can click **Save**. After saving, you will see a message on the workflow page indicating any missing items required to assign content. Content can only be assigned and activated on completed workflows. You will also note that the **Assign Content** button or link is not active until all required fields for all workflow steps have been added.

A completed workflow must have at least one step and each step must have a unique step name. Each step must also have a valid duration and at least one user or reviewer assigned to it.

Copying a Workflow

To make a copy of a workflow, click the **Copy** link on the Workflow List page. This creates an exact copy of the workflow definition, including steps, duration, assigned users, and welcome memos. Click the new workflow link on the **Edit Workflow** page and change the Workflow Name. You can make other modifications to the new workflow definition and then assign content.

Deleting a Workflow

You can delete a workflow only when it has no activated content. The link is disabled if the workflow has activated content. For a selected workflow, click the **Delete** link on the Workflow List page. If your workflow has activated content, the Delete link is disabled. To enable the Delete link, you must first remove all the activated content. Use the **Track Progress** Content View to remove the content from the workflow.

Assigning and Activating Content

There are two ways to get to the **Assign Content** page for a workflow:

- Click the Assign Content link on the Workflow List page
- Click Assign Content from the Edit Workflow page

The Assign Content link and button are disabled if the workflow definition is incomplete.

Select Content

On the Assign Content page is the list of folders where your content lives in AuthorSpace. When you select a folder, the order sets and plans of care display in the Content List pane. Select the content you want to activate and move it to the Assigned Content pane by clicking **Add to Workflow**. You can remove content by clicking **Remove from Workflow**.

Once you are happy with the content selected in the Assigned Content pane, the next step is to select the start date to begin the workflow process.

Select Start Date and Activation

On the Assign Content page, click **Select Start Date** and the Select Start Date page appears. Choose the date to start the workflow process. Each step of the workflow is shown with its start and end date calculated based on the start date just selected and the durations entered as part of the workflow definition process. You can use different start dates to go through what-if scenarios.

You can choose a date in the past. This is useful if you are migrating content going through your current process outside of the Workflow Management application. When you backdate the start date, any steps with an end date prior to today will be marked as completed on that date. Any steps with a start date prior to the current date will be marked as starting on that date. Welcome e-mails are not sent for any steps started when you backdate the activation.

Click **Activate** to start the workflow process. You will get a message on the **Workflow Activated** page and a link to the **Track Progress** tab.
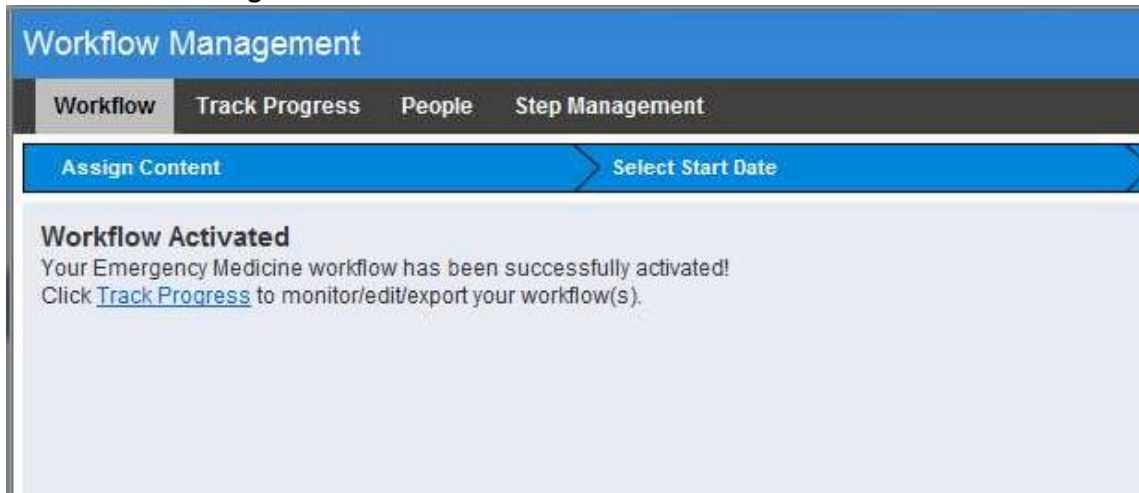
Tracking Progress

After you have activated content, click the **Track Progress** tab to monitor the progress of content through the workflow. The default graph view displays all active workflows and progress made in the workflow. The grid view on the bottom part of the page defaults to the **Content View**. The default Content View includes activated content that is In Progress, Late, or Blocked.
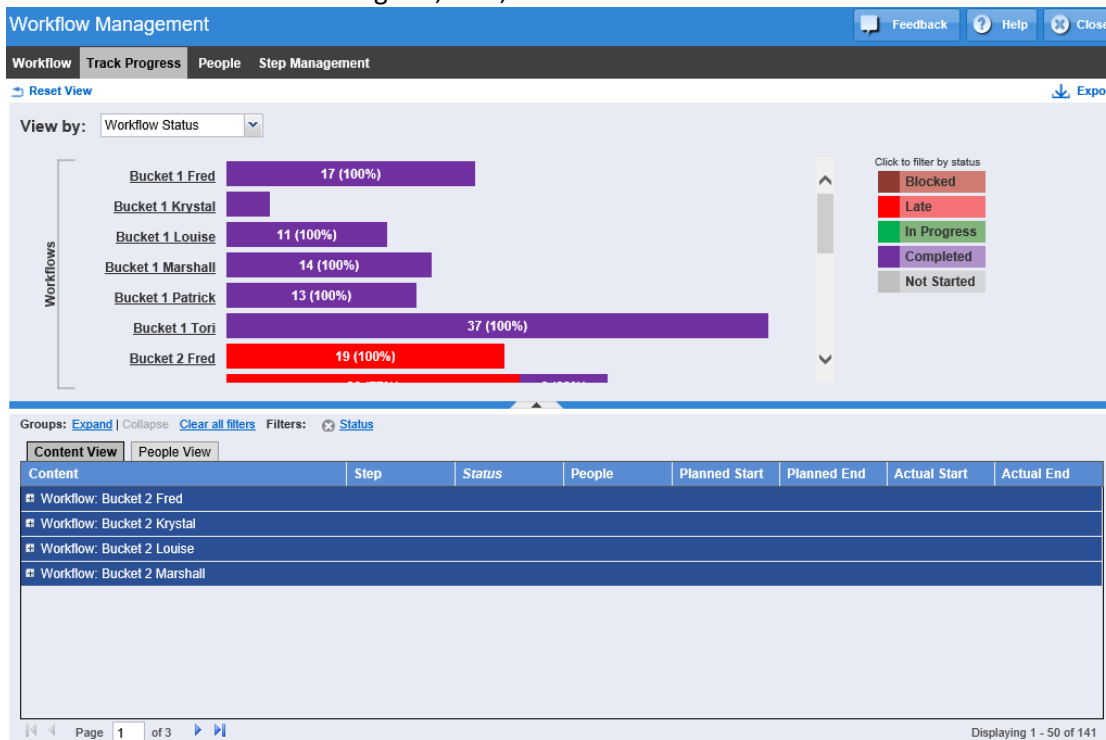
There several filter features on this page to narrow and change the view.

Workflow Status with Content View

Clicking on the Workflow Name (for example, Cardiology) will display the **Step Graph** with the steps for the workflow. The content view will display all activated content for the workflow. Clicking the following screen elements refreshes the content view:

- Workflow Status Bars and Legend Status Bars:

Step Status with Content View

The default view for the **Step Status** graph displays the status of all steps for all workflows. When a single workflow is selected, the steps are listed in sequential order. When the context is all workflows, the steps are listed in alphabetical order. The default is to view all workflows, as shown here.

The view for a single workflow is shown here:

Clicking the following screen elements refreshes the content view:

- Step Name displays content for this step with any status
- Step Status Bars and Legend Status Bars:

You can hide the graph by clicking on the **^** in the middle of the blue bar. This will hide the graph and display the grid in the full screen. To bring back the graph, click the **v**.

Content View

The **Content View** displays activated content grouped by workflow. Click the **+** next to a workflow name to expand and display the content for that workflow. By default, the grid view shows activated content filtered by step status of In Progress, Late, or Blocked. You can use the **Workflow Status** or **Step Status** graph to re-filter the content as you desire. See the preceding list for details on what filters can be applied using the graph.

Click the **Expand** link to expand all workflow groups. Click the **Collapse** link to collapse workflow groups.

Content	Step	Status	People	Planned Start	Planned End	Actual Start	Actual End
Workflow: Bucket 2 Fred							
Anesthesia PACU Pediatrics Version: 1 Folder: .Zynx Epic Build (NOT FOR IT USE) > Bucket 2 Content Status: Review Remove	Order Set Cro...	Late [1249 days]	Edit/View	05/16/2015	05/22/2015	05/16/2015	
Anesthesia Pre Op OB Version: 1 Folder: .Zynx Epic Build (NOT FOR IT USE) > Bucket 2 Content Status: Review Remove	Order Set Cro...	Late [1249 days]	Edit/View	05/16/2015	05/22/2015	05/16/2015	
Post Op AAA Repair Version: 1 Folder: .Zynx Epic Build (NOT FOR IT USE) > Bucket 2 Content Status: Review	Order Set Cro...	Late [1249 days]	Edit/View	05/16/2015	05/22/2015	05/16/2015	

You can remove all filters to see all steps for activated content by clicking the **Clear all filters** link. Individual filters can be removed by clicking the **x** preceding the filter name. Place the cursor over the filter name to display the filter values applied.

The Content View below displays all the steps for the content and the individual step status. The current step (In Progress, Late, or Blocked) is outlined in color according to its status.

The Content View is always grouped by workflow. The workflow name is shown in the dark blue bar and indicates the start of the group. Here is a list of the columns in this view.

Column Name	Description
Content	Content name, its folder path and current status. Hospital Administrators or Environment Managers or Administrators can remove content from the workflow by clicking Remove.
Step	Step name
Status	Step status
People	Link to view or edit the AuthorSpace Users and ViewSpace Reviewers currently assigned to the content for this step. Hospital Administrators or Environment Managers or Administrators can add or remove users assigned to the content for this step. This does not alter the workflow definition.
Planned Start	Date this step is/was currently scheduled to start. Hospital Administrators or Environment Managers or Administrators can edit Planned Start Dates for steps that have not yet started. Available dates are limited by the planned end date for the step.
Planned End	Date this step is/was currently scheduled to end. Hospital Administrators or Environment Managers or Administrators can edit Planned End Dates for steps which are In Progress, Late, or Blocked. Available dates are limited by the planned dates for the following step.
Actual Start	Date the step started.
Actual End	Date the step ended.
Original Start	Optional column - Date the step was originally scheduled to start when the content was activated.
Original End	Optional column - Date the step was originally scheduled to end when the content was activated.

Original Start and End Dates are optional columns. To display these columns in the Content View, hover over any column header, click the drop-down arrow, and choose **Columns**. You can choose one or both dates to include in the grid view.
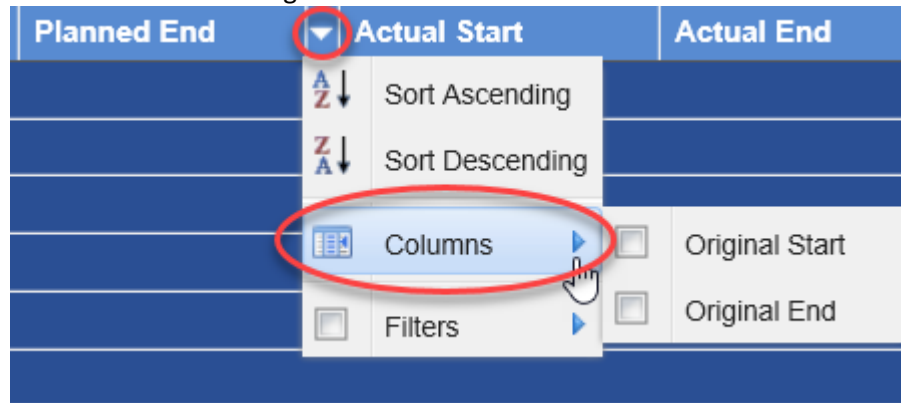
When you export the **Content View**, these fields will be included in the export regardless of whether you added the fields to the display.

People View

The **People View** initially displays activated content by collapsed User. Click the **+** next to a name to view the content assigned to that person. By default, the view shows activated content filtered by In Progress, Late, or Blocked step status.

Click the **Expand** link to expand all **User** groups. Click the **Collapse** link to collapse **User** group

The **People View** is always grouped by user name. The user name is shown in the dark blue bar and indicates the start of the group. Here is a list of the columns in this view:

Column Name	Description
User	User name. Click column header to filter by name
Workflow	Workflow name for the assigned content. The default view shows the workflows assigned to the user in alphabetical order.
Content	Content name, its folder path, and current status
Step	Step name
Status	Step Status
Planned End	Date this step is/was scheduled to end.
Review Date	Date the content was reviewed by the assigned user. The review date is captured when an assigned user clicks Review Complete on the View page for the content in AuthorSpace or ViewSpace.

People View with Workflow Status Graph

When **Track Progress** shows the **People view** with the Workflow Status graph, clicking the following screen elements refreshes the People view:

- Workflow Name displays the people assigned to the content for the workflow
- Workflow Status Bars and Legend Status Bars:

People View with Step Status Graph

Clicking the following screen elements refreshes the content view:

- Step Name displays the people assigned to any content for the step
- Step Status Bars and Legend Status Bars:

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Sorting and Filtering Grid Views

You can sort on any column in the grid view. Click a column header to sort in ascending order. Click again to sort in descending order. Sorting occurs within a workflow or user group. You can also hover over a heading and click the drop-down arrow and click either Sort Ascending or Sort Descending.

Most filtering can be accomplished by clicking on the graphs. Filtering is also available by clicking on the column header. To filter on Step or Status, click the column header arrow to display the filter option.

To filter on any of the date columns, click the column header arrow to display the filter options. Choosing one of the filter options displays the calendar where you can select a date.

On the **People View**, to view content by user name, click the User column header. The filter option displays a text box. Type in the text box the name you're looking for.
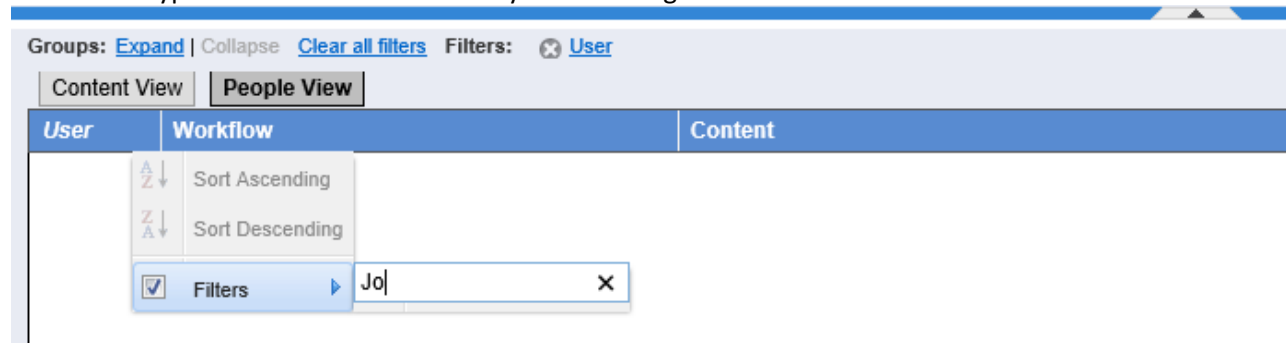
Filter indicators appear whenever filters are applied. Hover over the indicator to see the specific filters applied. The filters can be removed by clicking the **x** preceding the filter name.

Filters applied to one grid view remain in place when switching to the other view. For example, if you filter by workflow name on the **Content View**, when you switch to the **People View**, the **People View** is filtered by the workflow name as well.

Exporting
Export is available in the top-right for both **Content** and **People** views. The Export link creates a file named content.csv or people.csv. You can choose to open the file in Microsoft (MS) Excel or download the file. The export file includes the rows in the grid view based on the filters currently applied. Use MS Excel to format and print any reports needed.

Completing Workflow Steps
Hospital Administrators, Environment Managers, and Administrators are authorized to complete steps. Other AuthorSpace users are also authorized to complete steps if they have been designated as the Step Owner.

Select Content to Complete
Click the **Step Management** tab to see the grid that lists the content currently In Progress or Late and eligible for completion. AuthorSpace users who are not Hospital Administrators, Environment Managers, or Administrators will only see the content in steps where they have been designated step owner.

The default view for the grid is by Workflow Name and collapsed. Click the **+** to view the content list for a workflow. You can also apply filters to any of the columns in the grid as described above in Sorting and Filtering Grid Views.

Columns on the Step Management tab are:

Column	Description
Workflow	Workflow name
Content	Name of content with its folder path
Step	Step name
Status	Step Status
Planned End	Date the step is currently scheduled to end
Content Status	Content Status
Step Owner	Name of Step owner, if any
Complete Step	Checkbox to be selected when the content is complete

Completing a step captures the Actual End date shown in **Track Progress** on the **Content View**.

Starting Steps

When completing a step, the next step is automatically started when:

- There are no Reviewers assigned to the step (for example, only AuthorSpace Users are assigned to the step)
- Reviewers are assigned, and the content is in Review status.

The next step cannot start if there are Reviewers assigned and the content is not in Review status. In this case, the step status is Blocked, and welcome e-mails are not sent.

Content activated with a future start date will start on that date. If the first step has Reviewers assigned, be sure the content is in Review status. Otherwise the step status will be Blocked.

Welcome E-mail

If the step was defined with a **Welcome Memo**, an e-mail will be sent to all assigned AuthorSpace Users and ViewSpace Reviewers on the day the step starts. The e-mail will include the message defined for the step with a list of content to be reviewed. Review requests generated from Workflow are sent from ViewSpace. Review requests generated from AuthorSpace continue to be sent from AuthorSpace.

For steps with assigned Reviewers, the content is listed as links to the ViewSpace review page.

Dear Colleague,

Thank you for participating in our project to prepare content for our EMR. Below you will find the links to ViewSpace where you can comment on the content and indicate when you have completed your review.

Active Assignments

Content	Workflow	Step	Start	End	Status
Asthma – Pediatric - Admission	Pediatrics	Physician Review	07/15/2011	07/18/2011	In Progress [2 days left]
Asthma – Pediatric - Discharge	Pediatrics	Physician Review	07/15/2011	07/18/2011	In Progress [2 days left]

For steps without Reviewers, the content is listed with its folder path.

Active Assignments

Content	Workflow	Step	Start	End	Status
Admission Folder: General Medical	General Medicine	Initial Draft	07/12/2011	07/18/2011	In Progress [6 days left]
Bladder Management Protocol Folder: General Medical	General Medicine	Initial Draft	07/12/2011	07/18/2011	In Progress [6 days left]
AMT Chest Pain DEMO Folder: Zynx Demo Folder	General Medicine	Initial Draft	07/12/2011	07/12/2011	In Progress [0 days left]
AMT TEST Crisis Residential Admission Orders Folder: Zynx Demo Folder	General Medicine	Initial Draft	07/12/2011	07/12/2011	In Progress [0 days left]

Blocked Content

Content has a status of **Blocked** if there are Reviewers assigned and the content is not in Review status when the step is due to start. Blocked content will show on both the Workflow and the Step Status graphs. Click the **Blocked** legend bar on either graph to see the Blocked content list. Hover over the **Blocked** status on a content row to see why it is blocked.
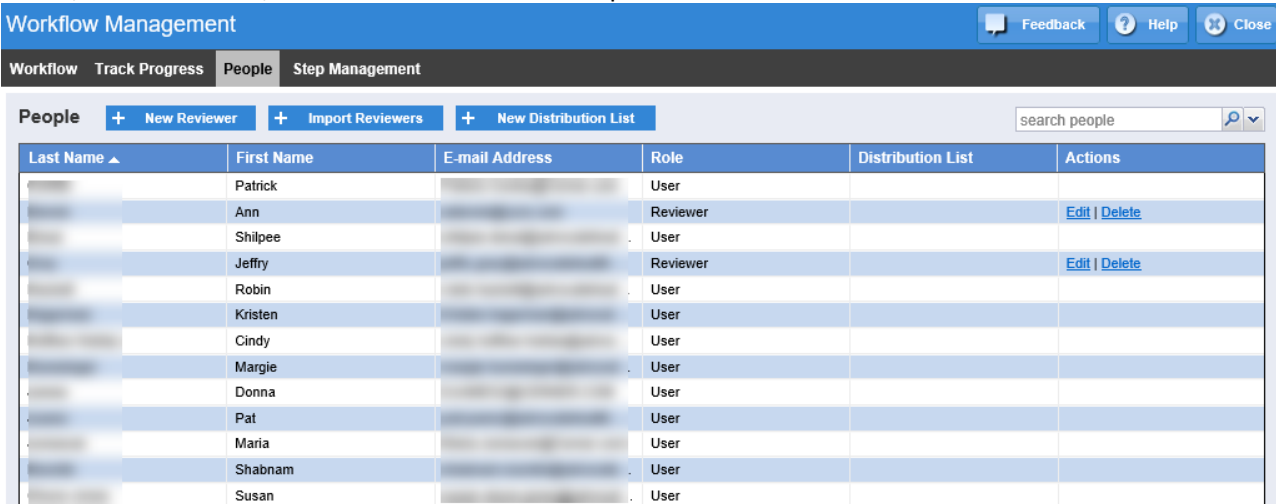
When the content status has been updated to Review in AuthorSpace, a background process will update the step status. This process runs periodically throughout the day, about every 5 minutes.

Managing Users and Reviewers
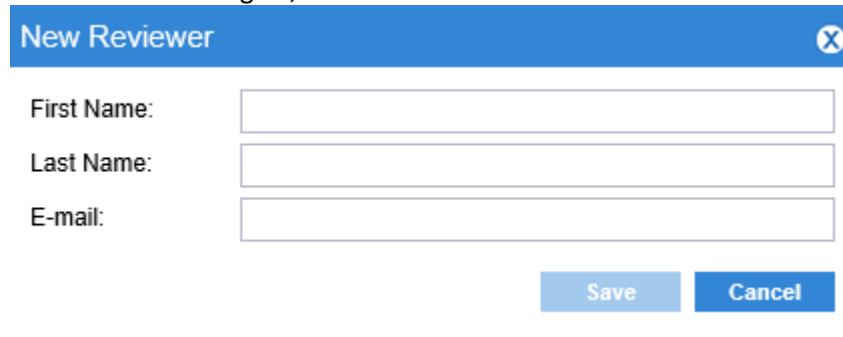
AuthorSpace Users and **ViewSpace Reviewers** are listed together on the **People** tab. First Name, Last Name, E-mail Address, and Role are listed for each person.

Creating and Editing Reviewers

Click **+ New Reviewer** to create a ViewSpace Reviewer. First name, last name, and a proper e-mail address are required to add a Reviewer. The e-mail address must be unique. Only Hospital Administrators, Environment Managers, and Administrators can create or edit Reviewers.

You can edit **ViewSpace Reviewers** by clicking **Edit** in the Actions column. Again, the e-mail address must be unique.

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Preparing Distribution Lists/Contacts from Outlook for Upload into Workflow Management
Exporting Distribution Lists
Outlook supports the export of individual **distribution lists**. However, if you wish to upload multiple **distribution lists** to Workflow Management, you will need to export each distribution list separately. Then, you can either upload them individually or combine the lists into a single spreadsheet for upload.

Note that Outlook will only allow you to export those distribution lists for which you are the owner or administrator. If you need to upload other distribution lists into AuthorSpace, you will need to ask the respective owners/administrators to do the initial export from Outlook for you.

Export Distribution List File from Outlook 2003/2007/2010

1. From the **Home tab**, select **Contacts** and double-click the desired **Distribution List** to open it.
2. From the **File tab**, select **Save As** and then select **Text Only (*.txt)** from the Save as type drop- down.
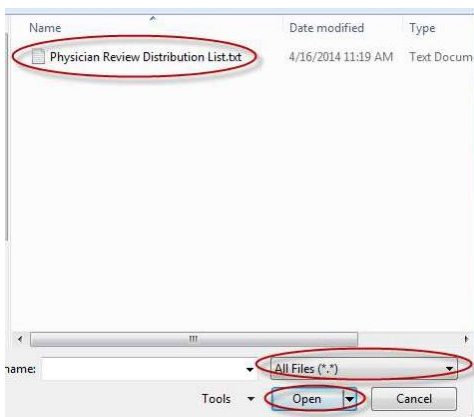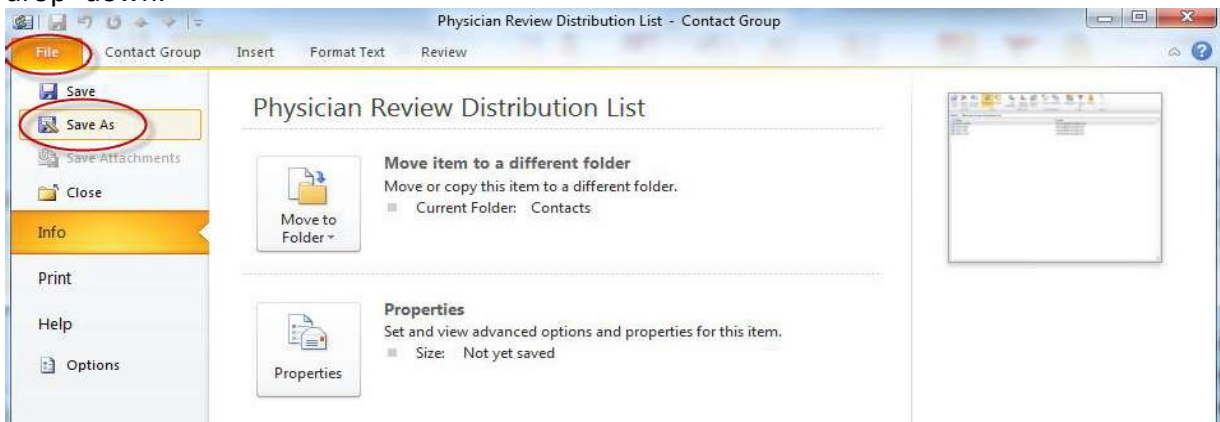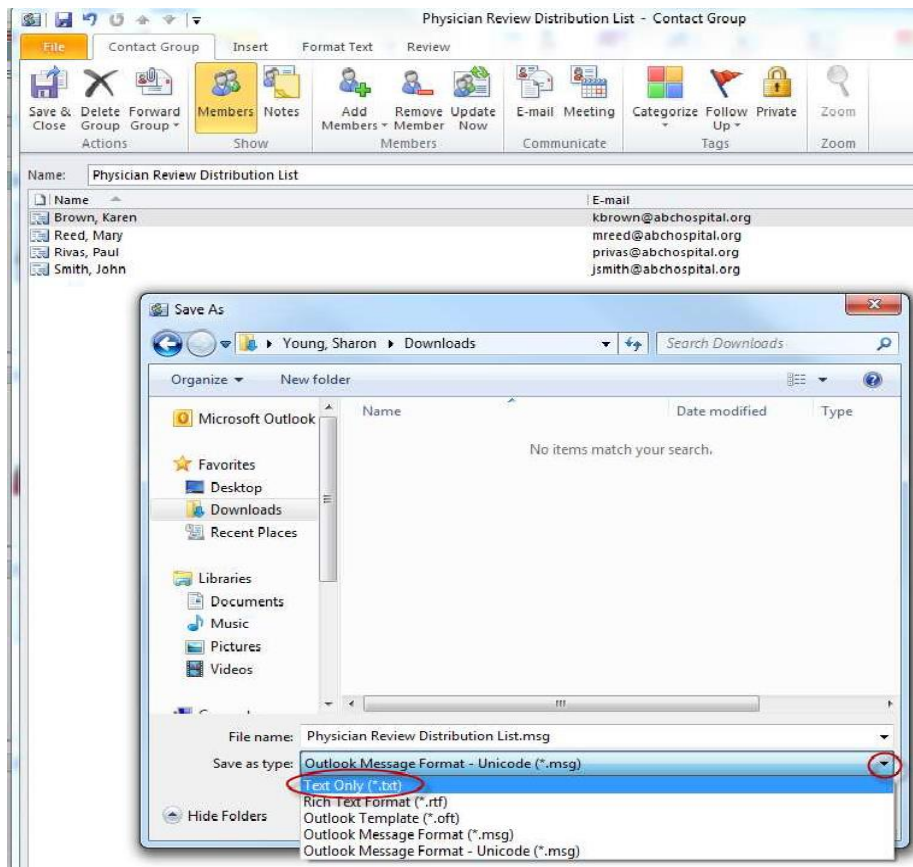
Export Distribution List File from Outlook 365

1. From the **Home tab**, select **Contacts** and double-click the desired **Distribution List** to open it.
2. From the **File tab**, select **Save As** and then select **Text Only (*.txt)** from the Save as type drop-down.

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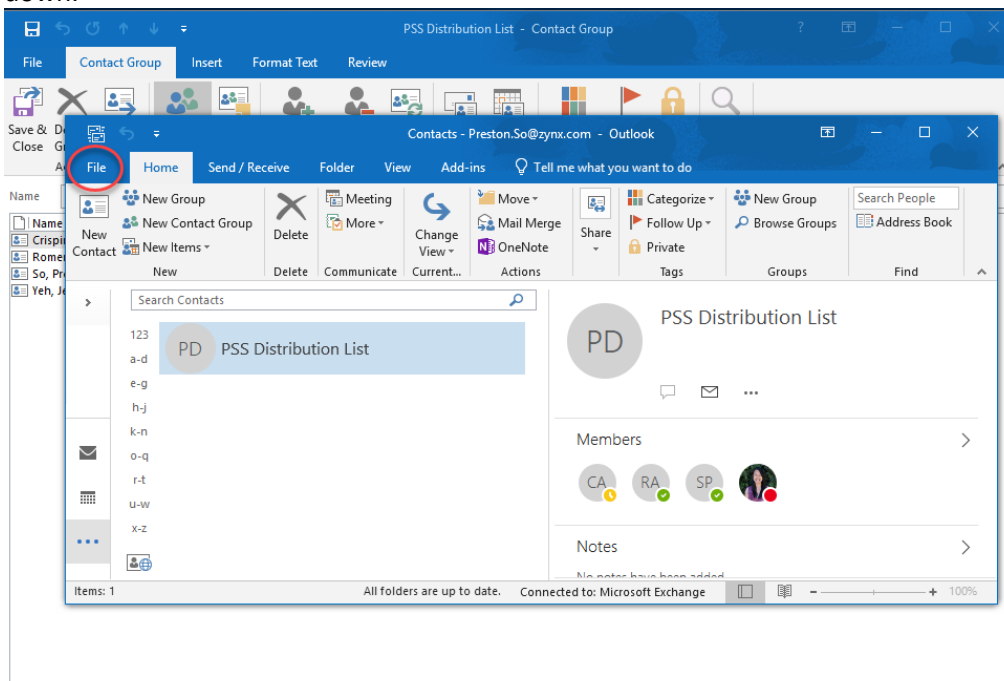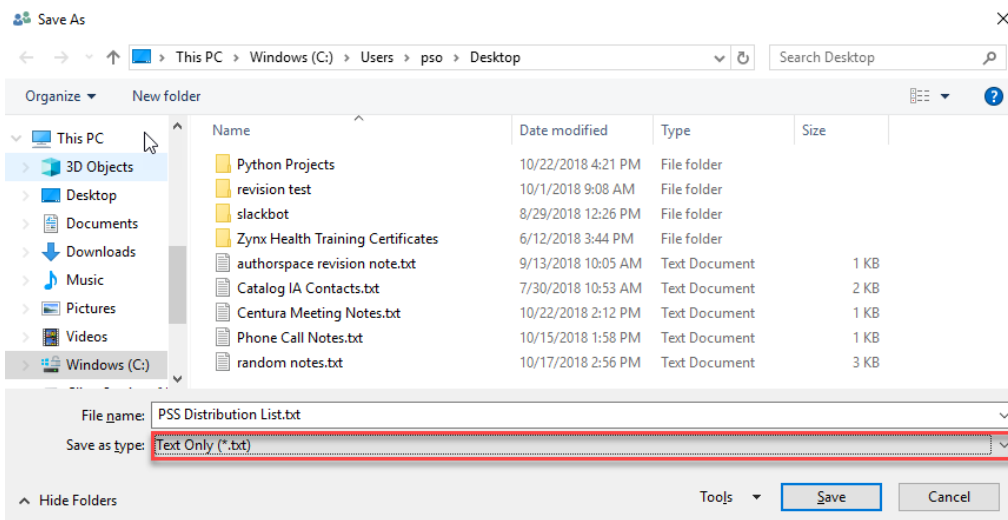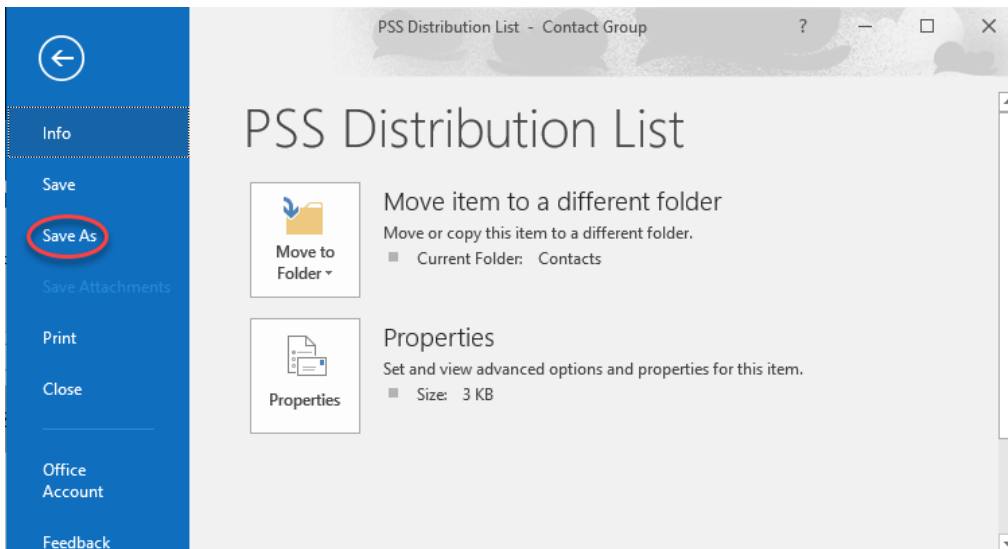
Prepare File for Upload into Workflow Management

1. Open the .txt file you have just created. It should appear as something like this.
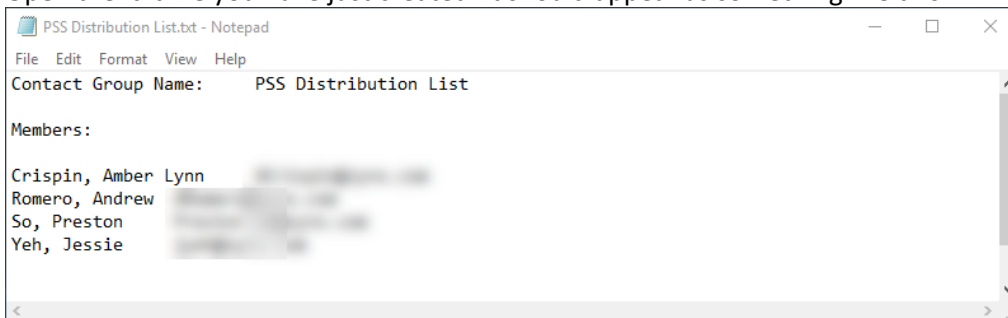
2. Erase the first two lines of text and adjust the spacing so that the contact information appears at the top.
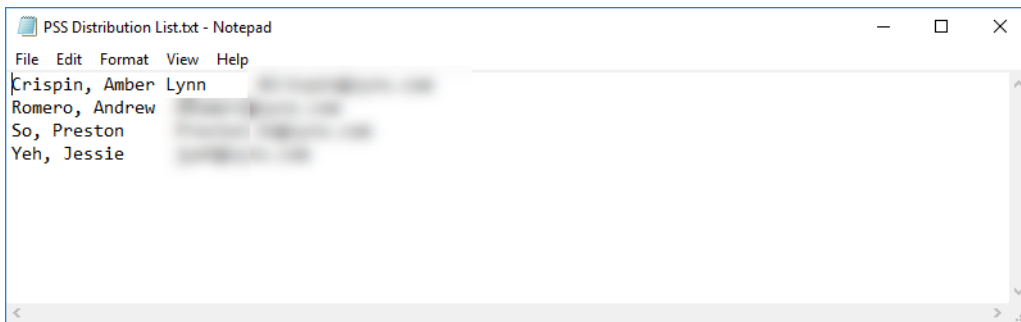
3. Highlight the space between one name and an email. Press CTRL+C to copy the space. Press **Edit** then **Replace**. Paste, CTRL+V, the space into the **Find what:** parameter and put a ","," into the **Replace with:** Parameter. Select **Replace All**.
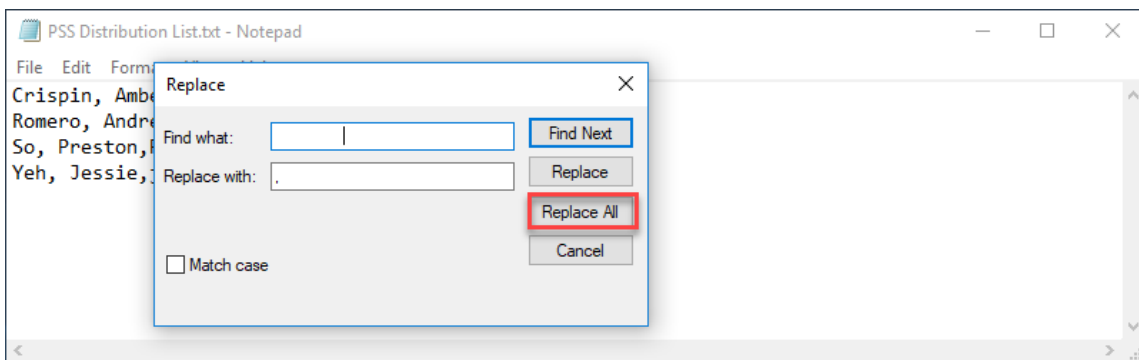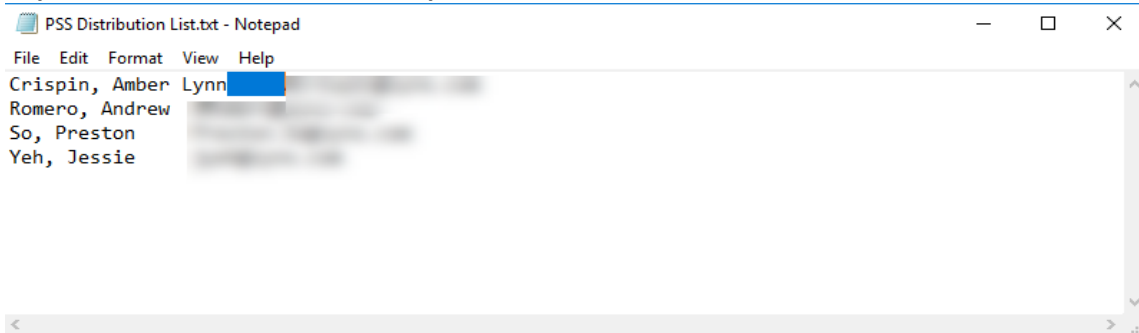
4. Save the file as a .csv file and select **All Files (*.*)** as the file type.
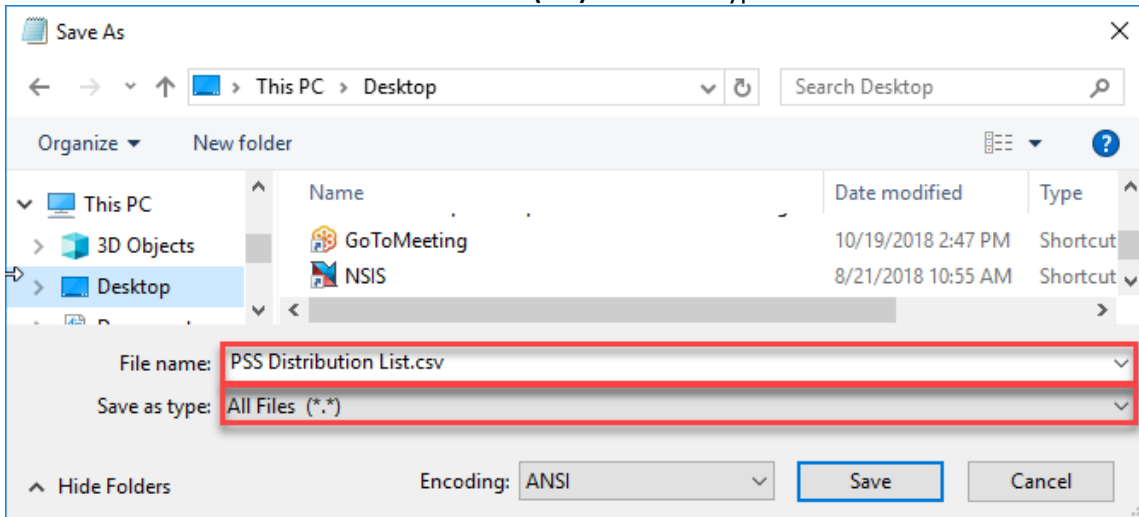
5. Launch Excel and open a blank workbook. From the **File tab**, select the **Data tab** and click **From Text/CSV.** For your file to appear, you will need to ensure that the drop-down to the right of File name shows either **All Files (*.*)** or **Text Files (*.prn;*.txt*;*.csv)**. Select the .csv file you just created and Import.
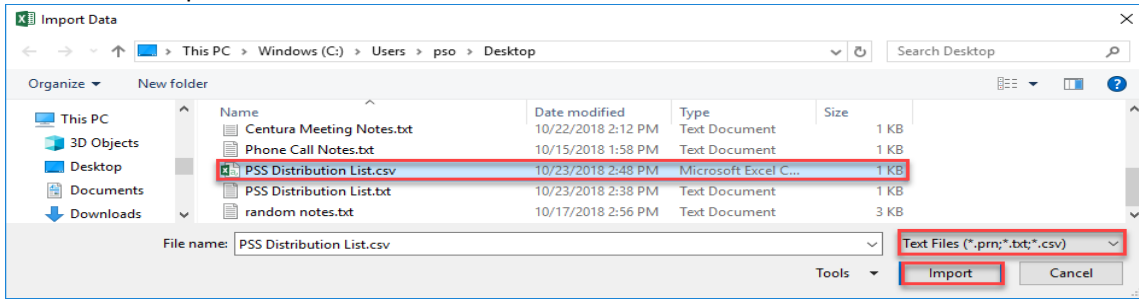
6. A preview should be shown. Make sure that the **Delimiter** is set to **Comma**. When the preview is appropriate, click **Load.**
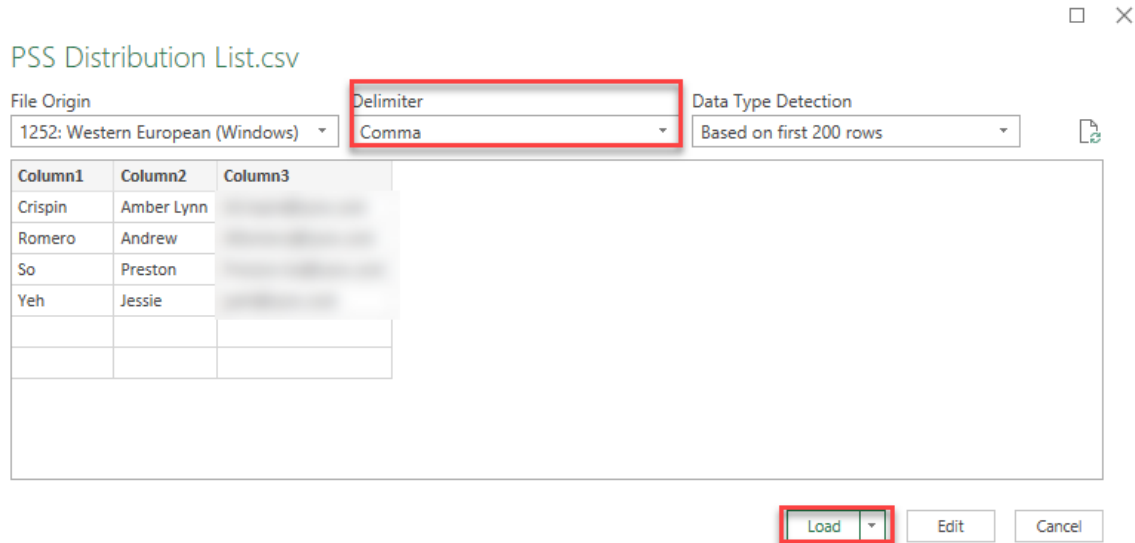
7. You will need to format the spreadsheet that subsequently appears to align exactly with the following heading conventions:

   ▪ Column A: Last Name
   ▪ Column B: First Name
   ▪ Column C: E-mail Address
   ▪ Column D: Distribution List

   Column D should be populated with the full distribution list name. Note that the name is split across multiple columns in the example below.

   Other requirements to be aware of:

   ▪ Empty rows are not allowed.
   ▪ Extra spaces within a cell are not allowed.

To format the above spreadsheet, you would need to:

1. Delete row 1
2. Insert a row at the top of the spreadsheet
3. Type the following into the appropriate cells

   ▪ Cell A1: Last Name
   ▪ Cell B1: First Name
   ▪ Cell C1: E-mail Address
   ▪ Cell D1: Distribution List

4. Type the full name of the distribution list into column D beneath the header and copy and paste it into the rest of the populated rows. The final correctly formatted spreadsheet should look like this:

	A	B	C	D
1	Last Name	First Name	E-mail Address	Distribution List
2	Crispin	Amber Lynn		Product Support Specialist
3	Romero	Andrew		Product Support Specialist
4	So	Preston		Product Support Specialist
5	Yeh	Jessie		Product Support Specialist
6				
7				

5. Save the correctly formatted spreadsheet as a .csv file. Make sure that you select the file type **CSV (Comma delimited) (*.csv)**
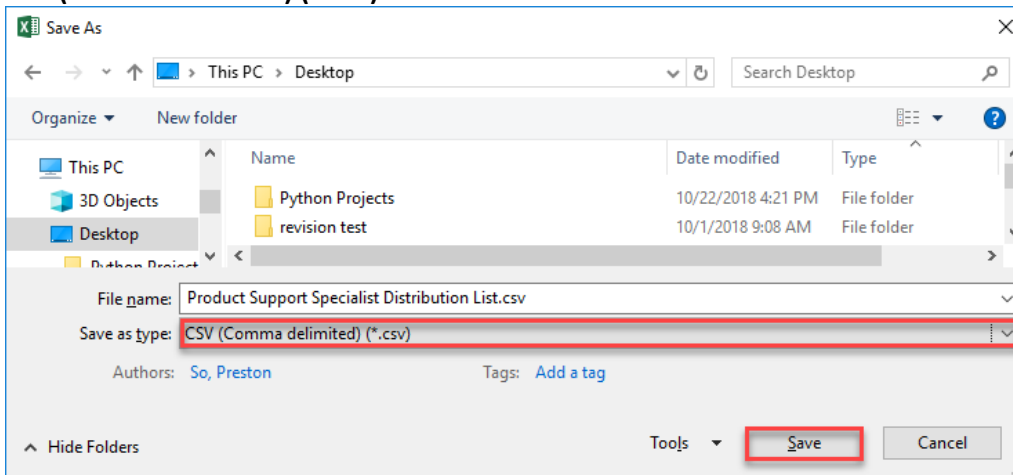
6. If you get any warning messages, click **OK** or **Yes**.
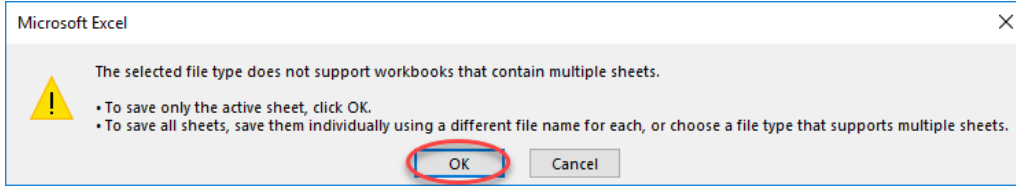
That's it! Your **distribution list** is now ready to be imported into Workflow Management. If you choose to combine multiple distribution lists into a single .csv file for upload and a single contact belongs to more than one distribution list, that contact should be listed in multiple rows with different **distribution list** in each row under column heading Cell D1:

	A	B	C	D	E
1	Last Name	First Name	E-mail Address	Distribution List	
2	Crispin	Amber Lynn		Product Support Specialist	
3	Romero	Andrew		Product Support Specialist	
4	So	Preston		Product Support Specialist	
5	Yeh	Jessie		Product Support Specialist	
6	So	Preston		Interns	
7					

If you upload any distribution lists that do not already exist in Workflow Management, AuthorSpace will automatically create the distribution list and tie the respective reviewer records to the indicated distribution list.

Exporting Contacts

With this enhancement, you also can choose to export all your Outlook contacts and upload them into Workflow Management as **reviewers** (users with AuthorSpace accounts still need to be created in the usual manner). As with the distribution lists, you need to be the owner or administrator to perform the export. These instructions are for Outlook 365.

Export Contacts File from Outlook 2004/2007/2010

1. For Outlook 2010, from the **File** tab, select **Options**.
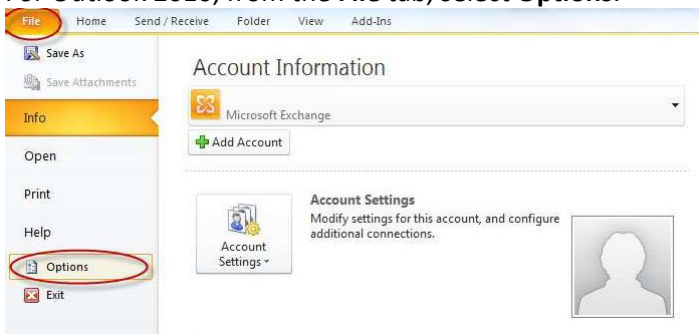
For Outlook 2003/2007, from the **File** tab, select **Import and Export.**
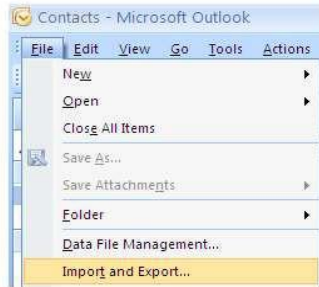
2. For Outlook 2010, from the Outlook Options window, select **Advanced** and click **Export**.
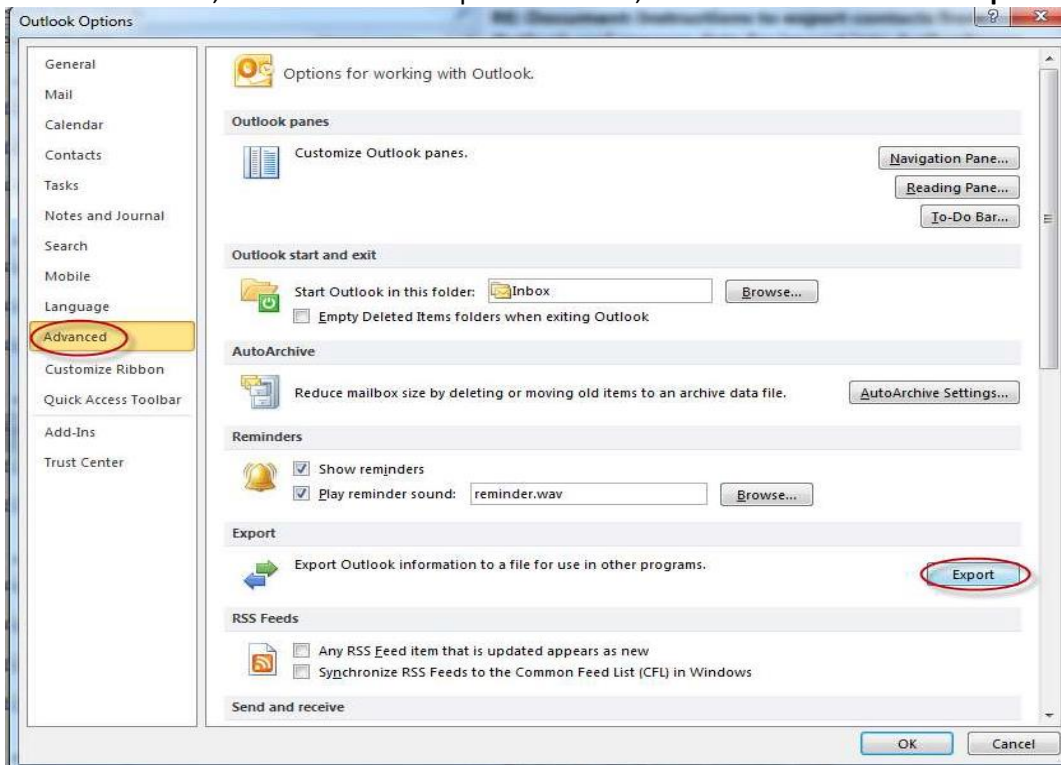
For Outlook 2003/2007, this step is unnecessary
Note: The rest of the steps are identical

3. From the **Import and Export Wizard**, select **Export to a file** and click **Next**.
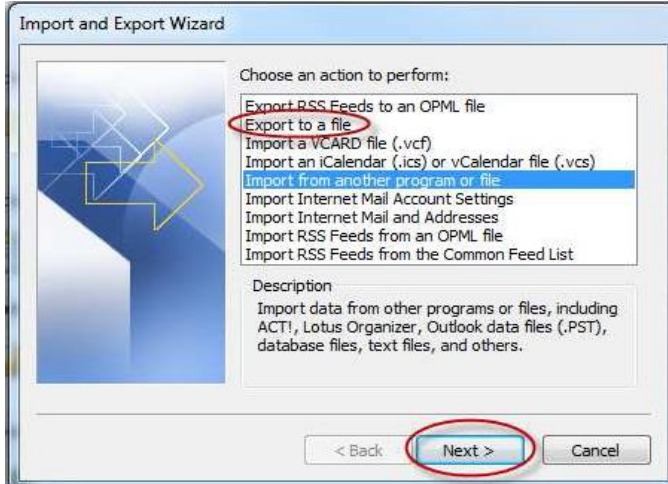
4. Select **Comma Separated Values (Windows)** and click **Next**.
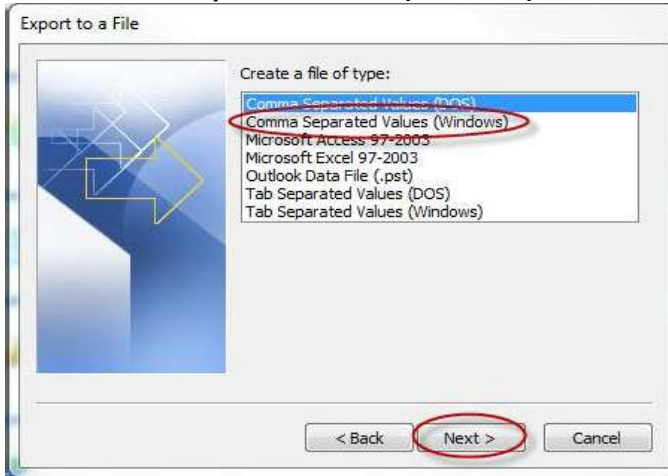
5. Select the **Contacts** folder and click **Next**. Remember that you can only export Contacts for which you are the owner or administrator.

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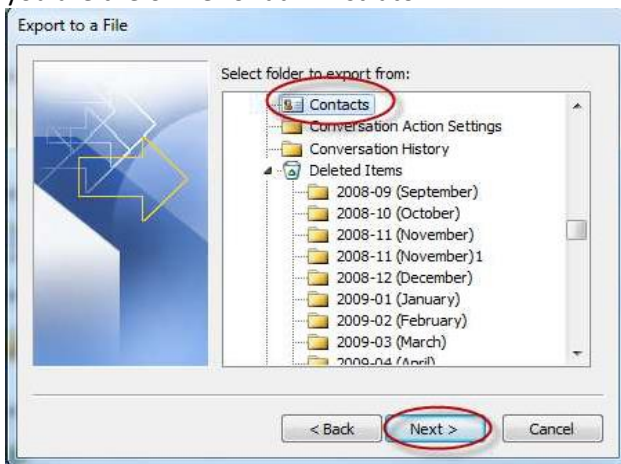
6. Click **Browse** to choose a destination folder. Enter the File name and click **OK**. Then click **Next**.
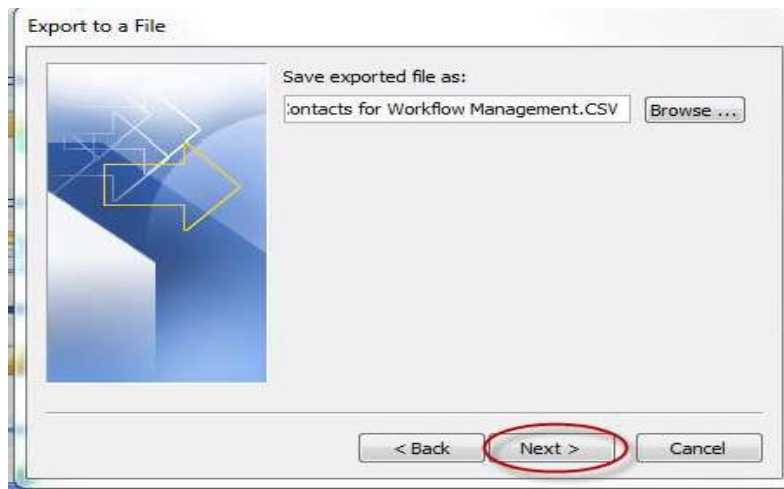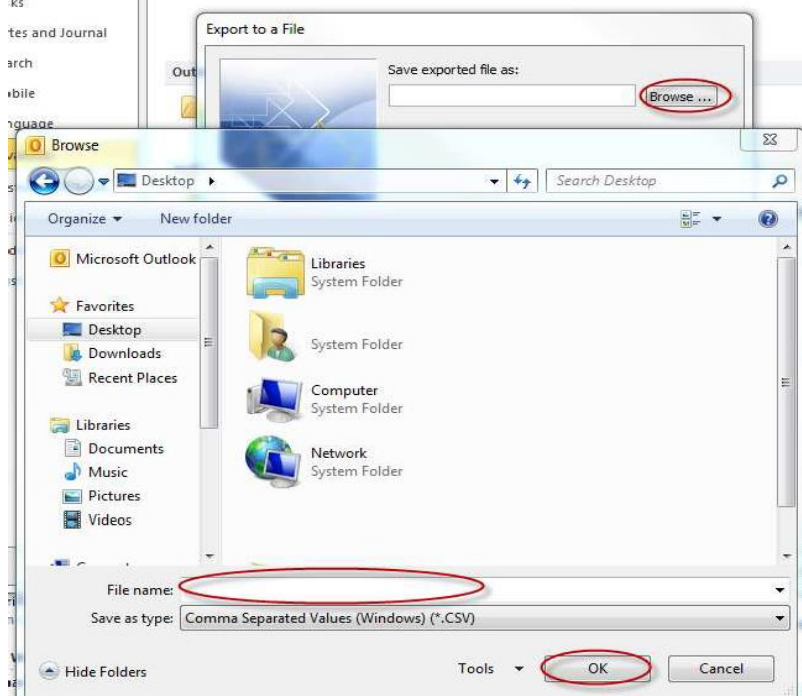
7. Leave the default selection checked and click **Finish.**

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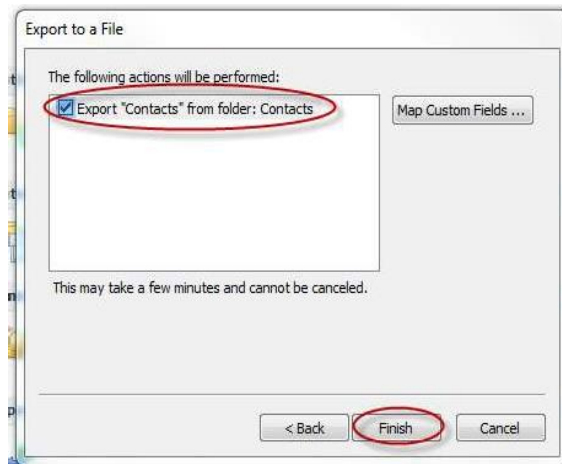
Export Contacts File from Outlook 365

1. Click on **File** and then on **Open and Export**. Select **Import/Export**.
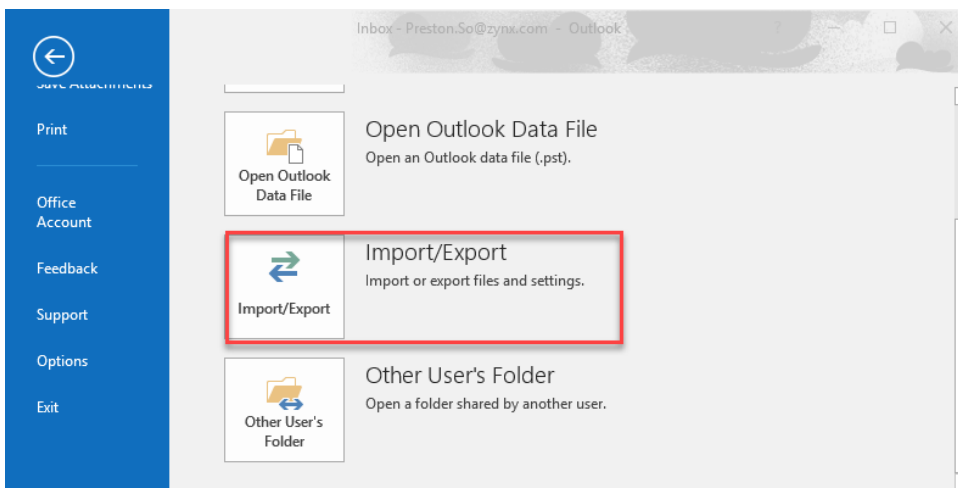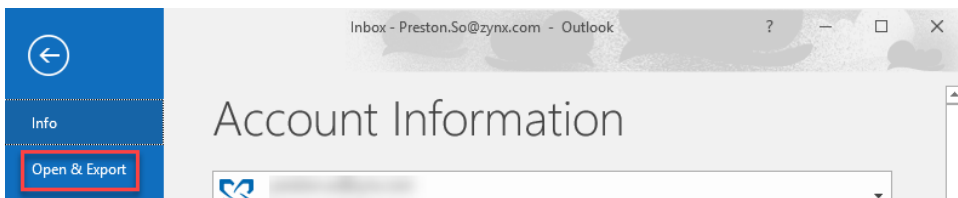
2. In the new window, select **Export to a file** and click **Next.**
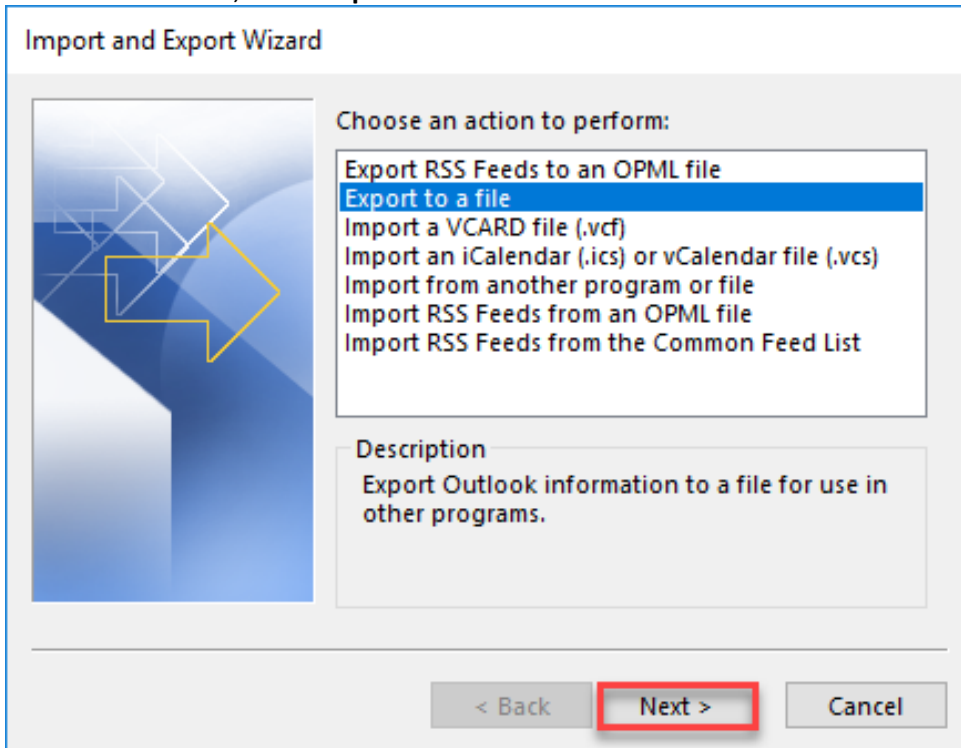
3. Select **Comma Separated Values** and click **Next**.
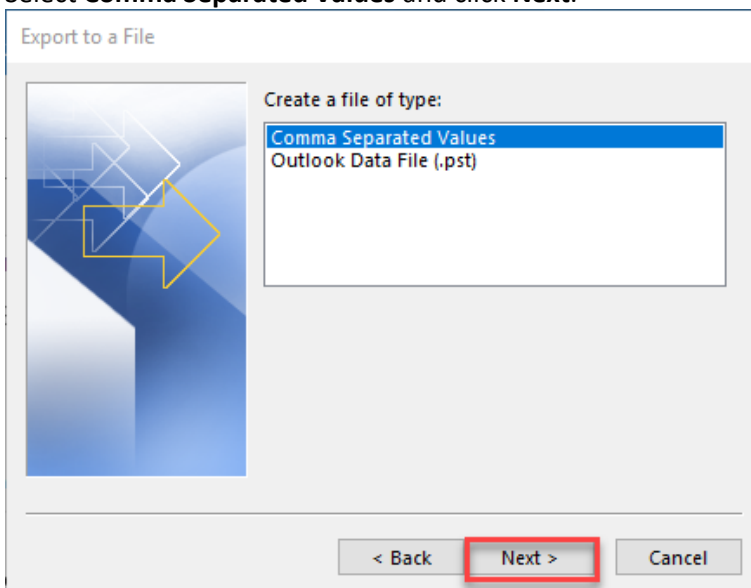
4. Select **Contacts** and click **Next.**
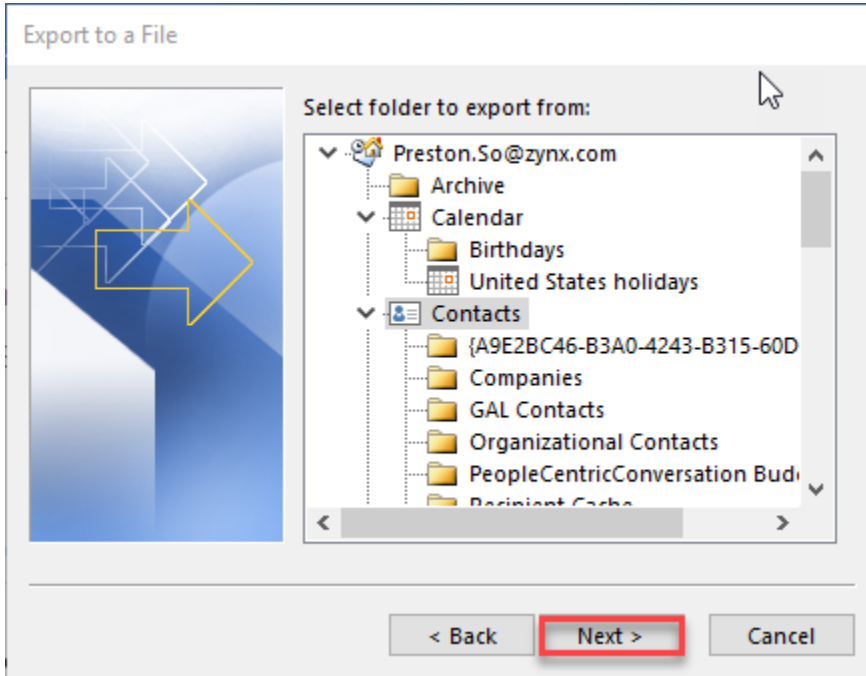
5. Click **Browse** to set the file destination and name. Make sure that the file is saved as a .csv file. Click **OK** when you are done and then click **Next.**
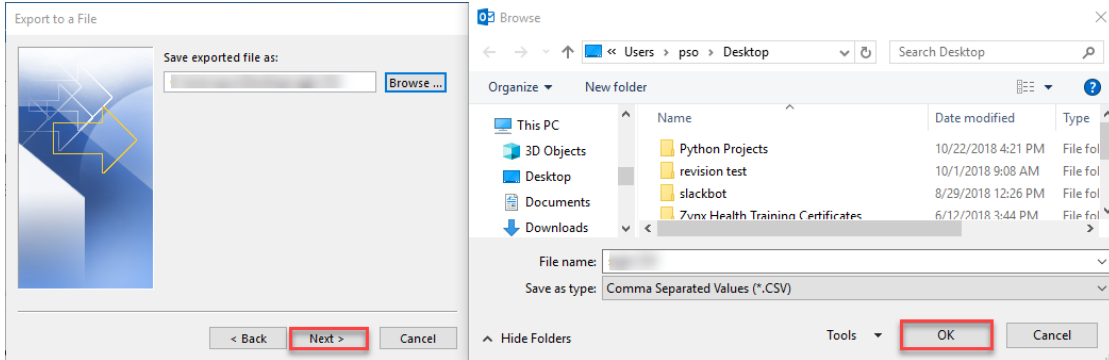
6. Keep the box checked under **The following actions will be performed**. Click **Finish**.

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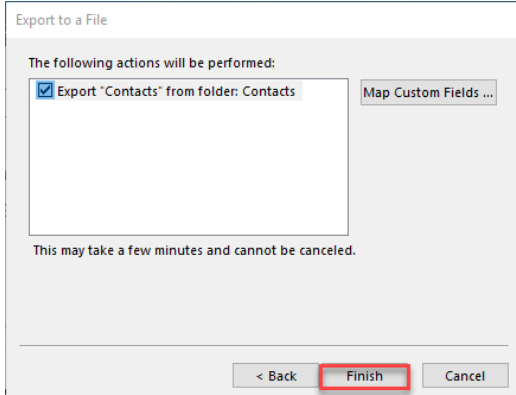
Prepare File for Upload into Workflow Management

1. Launch the .csv file that was created. It should open up in Excel.
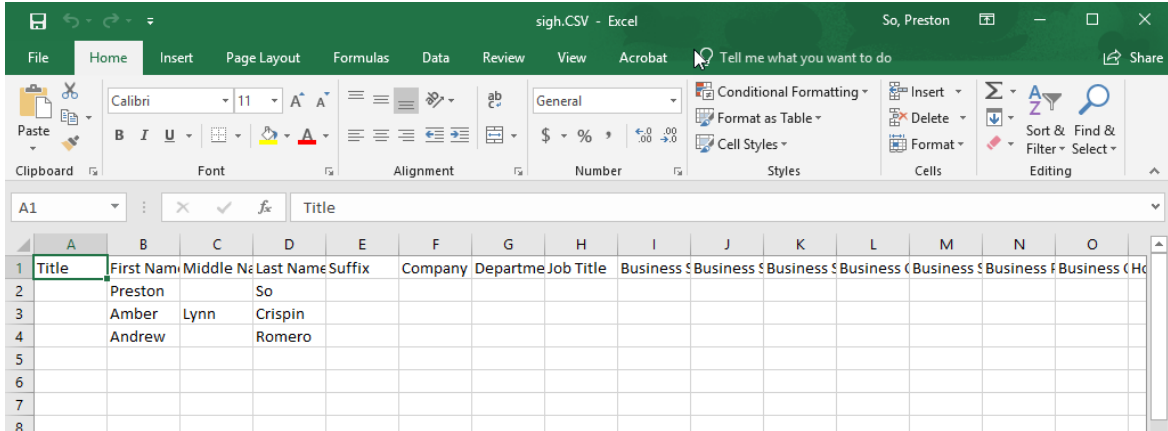
2. Remove all unnecessary columns from the file. The required columns are **First Name**, **Last Name**, and **Email Address**. In the example shown below, only columns B, D, and BF are necessary. Note that other Outlook versions may extract the data into different columns.
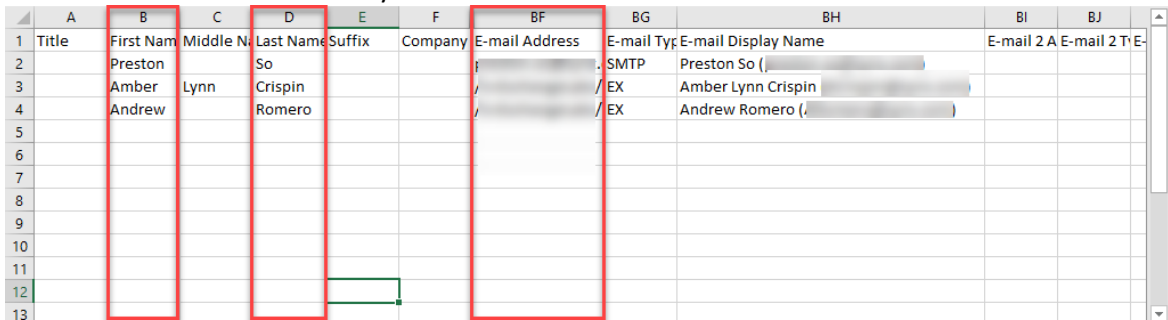
3. Format the spreadsheet so that it aligns exactly with the following heading conventions:

   o Column A: Last Name
   o Column B: First Name
   o Column C: Email Address
   o Column D: Distribution List

   Other than the heading, column D may be blank; all other columns must be populated. If you have distribution list information, you can either enter it here or export it and upload it separately to Workflow Management.

   The final correctly formatted spreadsheet should look like this:

4. Save the correctly formatted spreadsheet as a .csv file. Make sure to have the file type as **CSV (Comma delimited) (*.csv)**.
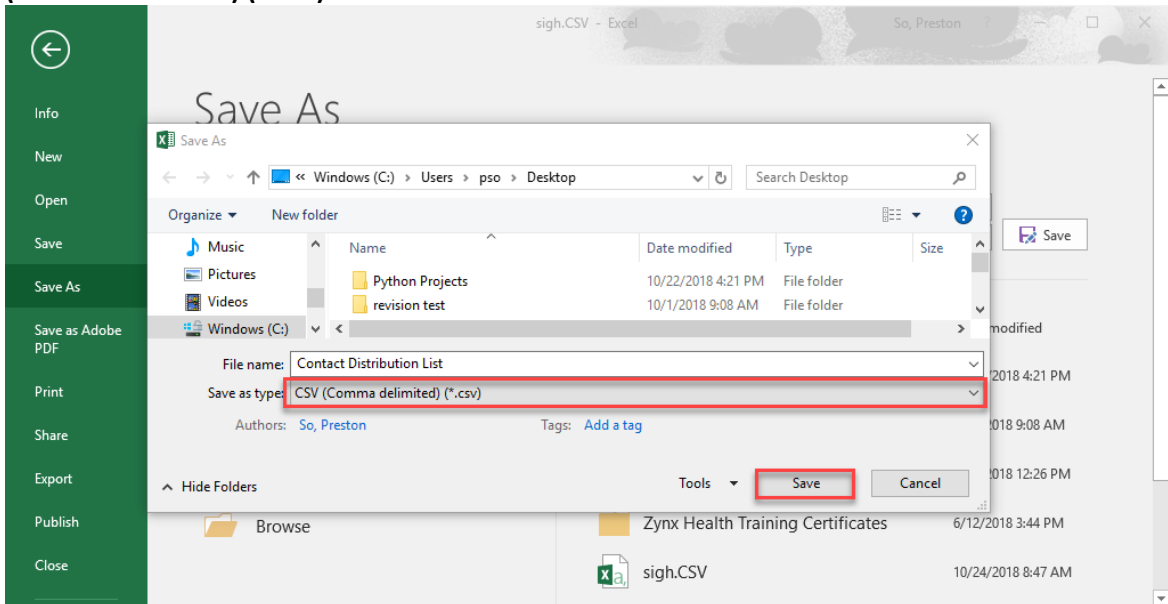
5. If you get any warning messages, click **Yes**.
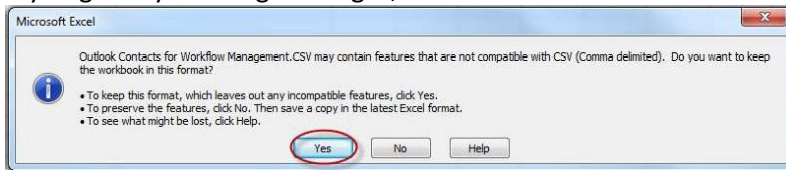
Import E-Mail and Distribution List from Workflow

Zynx Health is pleased to announce the launch of a new feature that provides a file-based import of Outlook contacts into Workflow Management.

Launch Workflow Management

1. Log in to AuthorSpace.

2. Click Workflow Management.

Navigate Contacts List in Workflow Management

1. Click the **People tab**.
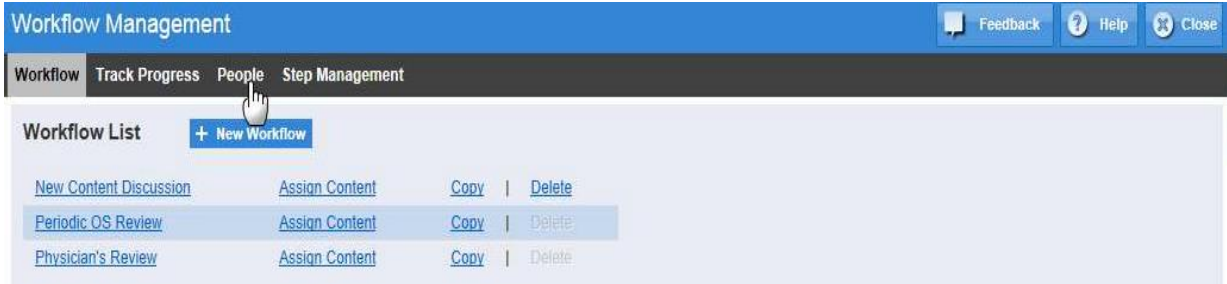
Choose the Import File to Load
Note: For instructions on how to prepare the file, refer to Export/Import instructions in the Preparing Distribution Lists/Contacts from Outlook for Upload into Workflow Management section.

1. Click **+ Import Reviewers**.

2. Click **Choose File**
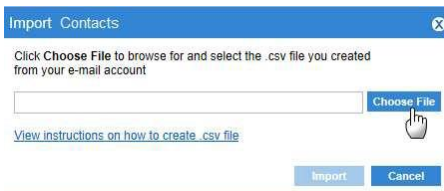
3. Browse for the .csv file saved on your computer.
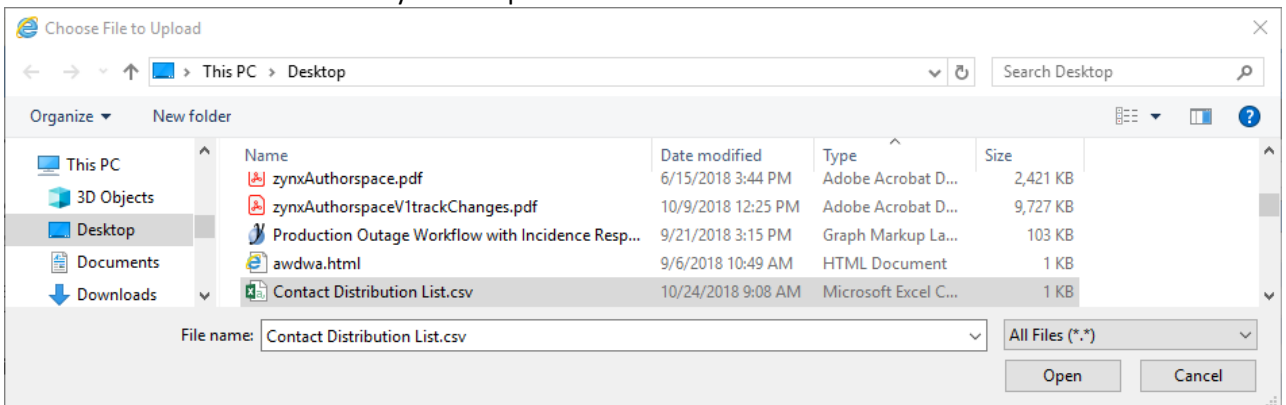
4. Click Open or double-click on the file.

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5.   Click **Import**.
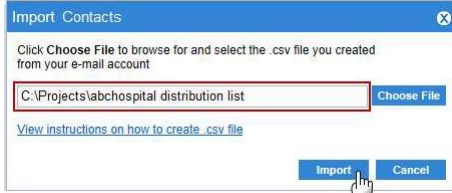
6.   When successful, a confirmation dialog should appear stating the number of records processed successfully as well as if any changes were made to any existing Distribution Lists.
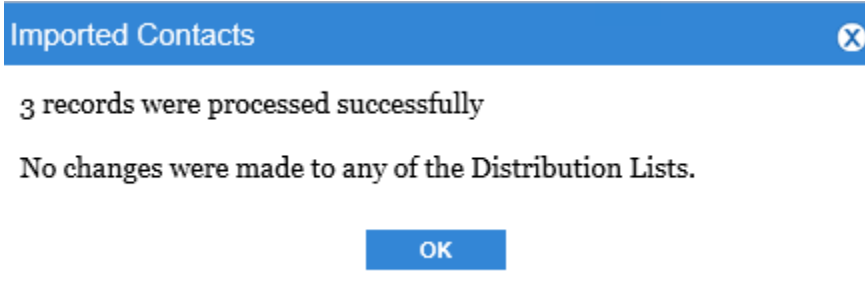
Import Validation
Review and Fix Validation Errors
Note: Refer to Export/Import instructions in the Preparing Distribution Lists/Contacts from Outlook for Upload into Workflow Management section.

1.   Click the **View validation errors** link.

2.   Click **Save**.

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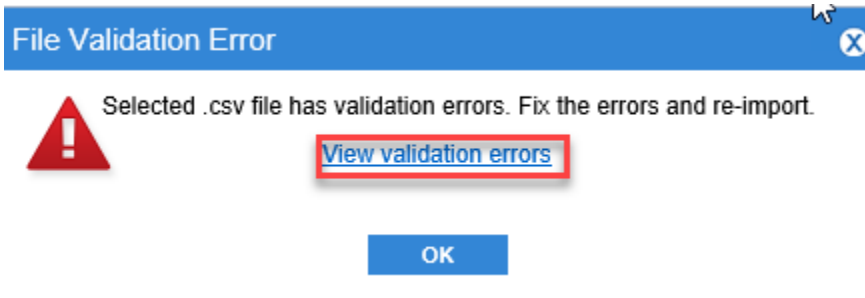
3. The system will prompt you to click **Open** or **Save**.

4. Open the file from its saved location.
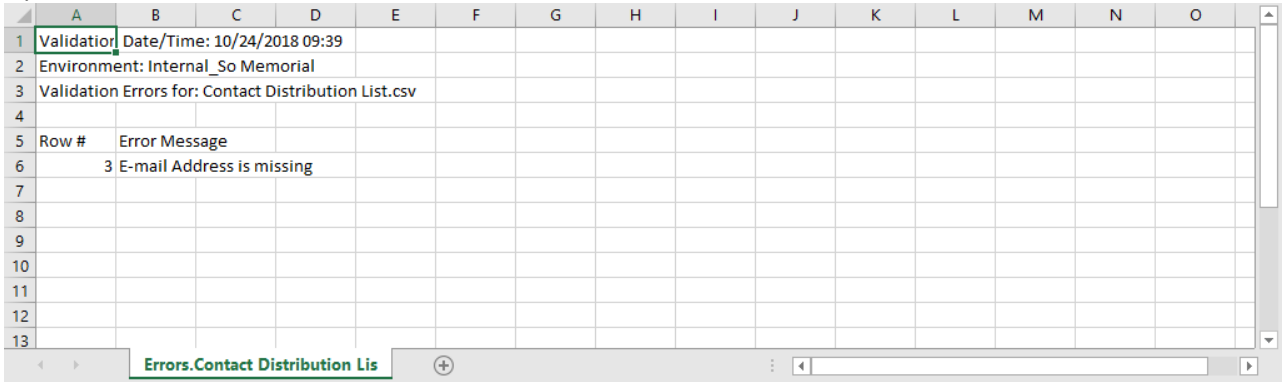
Create New Distribution List in Workflow Management

1. Click **+ New Distribution List**.
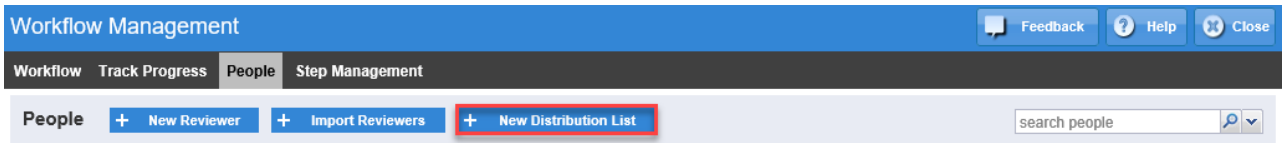
2. Type a name in the Distribution List field.
3. Select the members in the left page to be associated with the new **Distribution List**.
4. Click **Add to Distribution** List in the middle of the screen.

5. Click **Submit**.

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Modify and Existing Distribution List

Note: There are two ways to associate a reviewer to a Distribution List: here and from New/Edit Reviewer.

1. Find a Distribution List to modify and click **Edit** in the Actions column.

2. Modify the member of the Distribution List by:

   o Selecting the member from either the left or right pane
   o Clicking **Add to Distribution List** or **Remove from Distribution List**

3. Click **Submit**.

Delete Distribution Lists and Reviewers from the People Tab

1. Find a **Reviewer** or **Distribution List** to be deleted.
2. Click the **Delete** link in the Actions column

3. Click **Delete**.

4. A green banner appears briefly to confirm the request has completed successfully.

Note: The process is the same for deleting a reviewer.

Associate a Reviewer to Multiple Distribution Lists

Note: This action can be performed while creating or editing a reviewer.

1. Click **+ New Reviewer** from the **People tab**.

2. Enter the **New Reviewer** information (first name, last name, email address).
3. Click the checkbox for the desired **Distribution List**.

Modify a Reviewers Association to a Distribution List from the Edit Reviewer Menu

1. Find the reviewer from the **People tab**.
2. Click the **Edit** link.
3. Edit Reviewer page appears.
4. Click the **Distribution List** checkboxes to add or remove (existing associations are already checked).
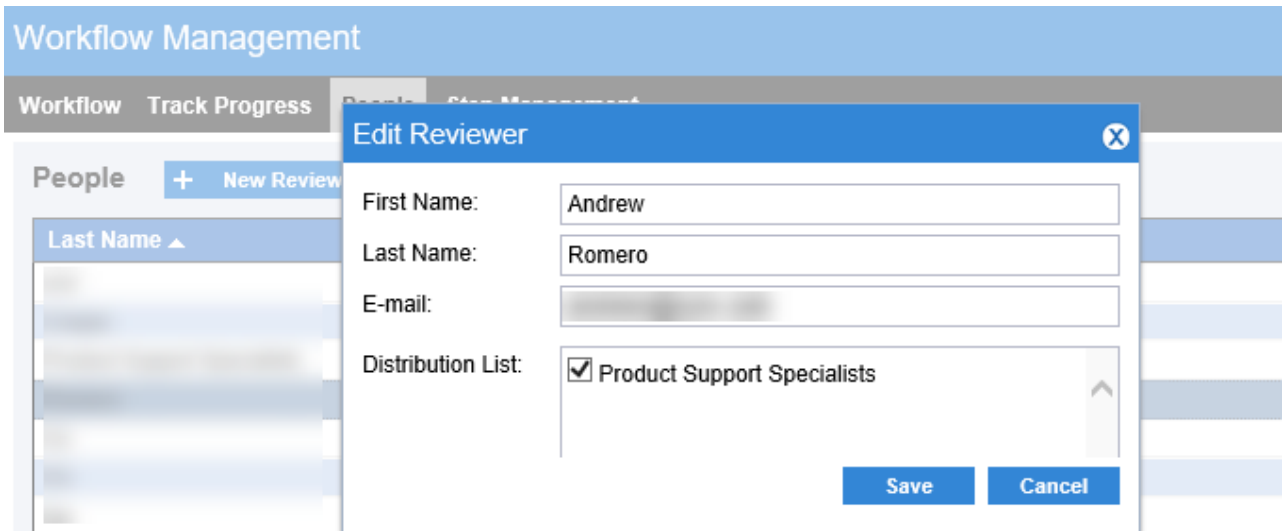
Assign a Distribution List to Step

1. Select the **Distribution List** from the left pane.
2. Click **Add to step**.
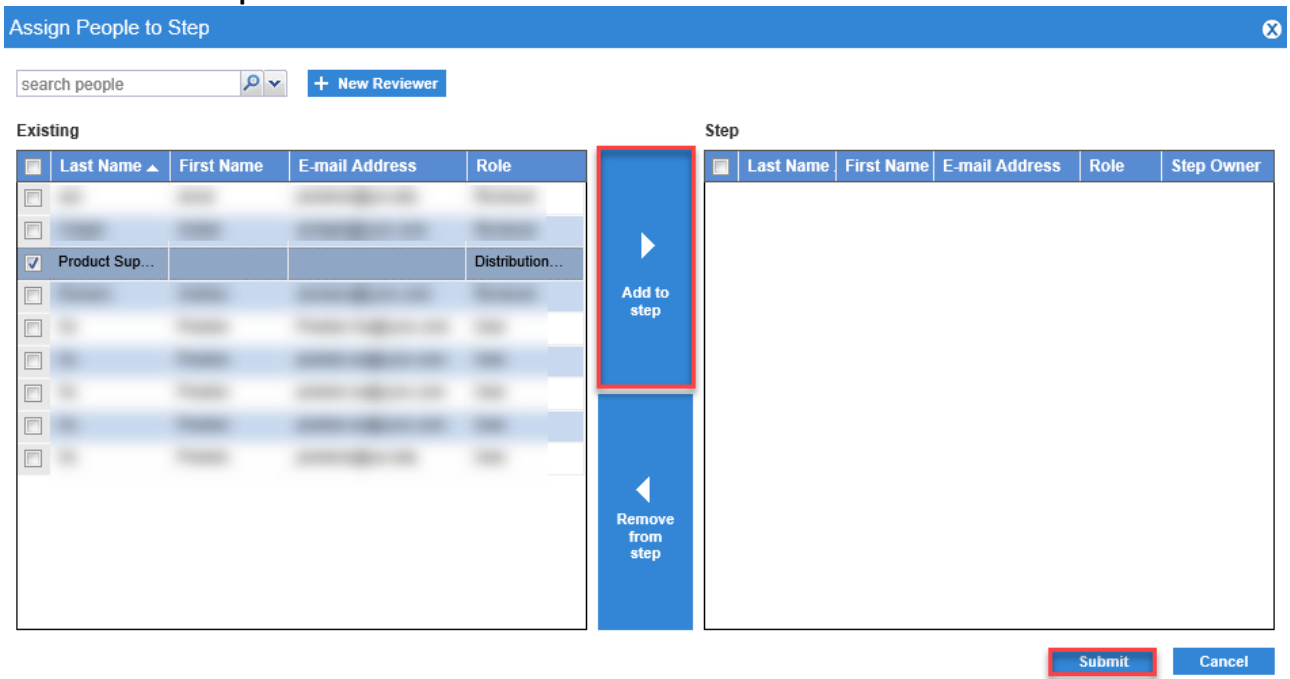
3. Click **Submit**.

Searching for Members of a Distribution List Using Distribution List as the Filter

4. Click on the filter drop-down.
5. Select **Distribution List**.
6. Type the name of the Distribution List in the search field.
7. Click the magnifying glass icon or the Enter key.

Note: The results are showing all members associated to the filtered Distribution List.

Searching for a Distribution List Using Last Name as the Filter

1. Click on the filter drop-down.
2. Select Last Name.
3. Type the name of the Distribution List in the search field.
4. Click the magnifying glass icon or the Enter key.

The results are showing all the existing Distribution Lists that match the search string.

Editing Workflows
Edit a workflow by clicking the workflow name from the Workflow List on the Workflow tab.

Minor Edits
When changing a workflow name or step name, the new name will immediately appear in **Track Progress** for activated content.

Changing a steps duration, assigned people, or welcome memo does not affect content already activated. Only content activated after the change will use the new step definition.

Delete and Re-sequence Steps
Deleting or re-sequencing steps is allowed but has serious consequences if the workflow already has activated content.

If the workflow does not have activated content, delete an unneeded step by clicking the appropriate **x** on the right side of the step.
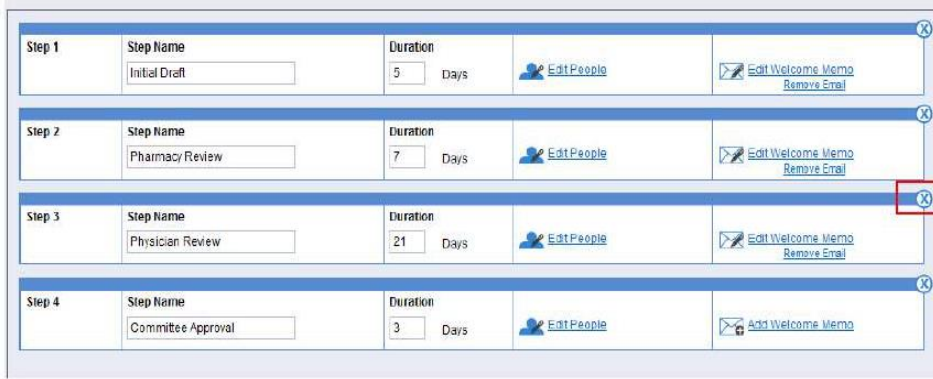
Restore the step by clicking the **+** on the right side of the step.

To re-sequence a step, click and hold the group bar for the step and drag and drop the step to the new position.
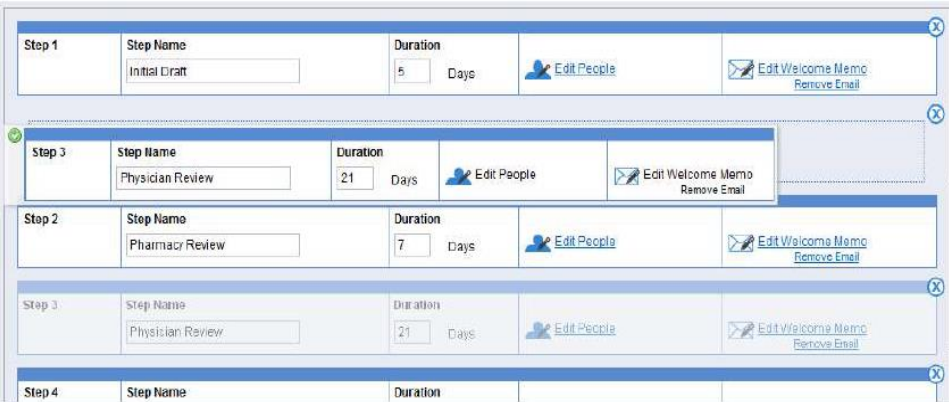
Effects of Deleting Steps with Active Content
If a workflow has activated content, the content will be deleted because it will no longer conform to the workflow definition. When saving this change, you are given the option to export the content. This will create a text (.csv) file that can be saved locally and used with MS Excel. You can reactivate the content currently in progress to restore it to its current step using the revised definition. The text file contains all the information you will need to reactivate the content with its original start date. When activating with a

date prior to today, the current step will not generate a Welcome e-mail since this step would have done so when it originally started.
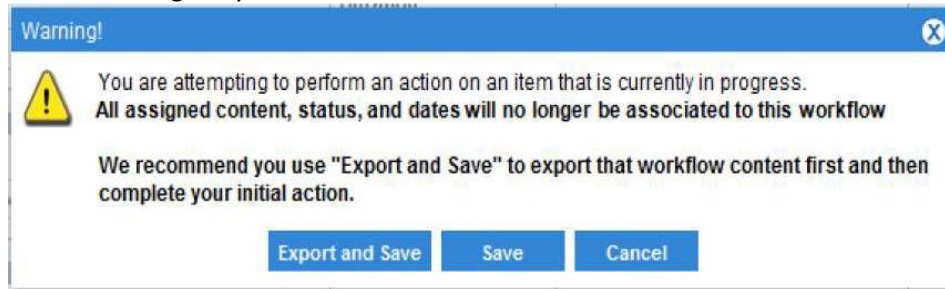
If you want activated content to follow the original version of the workflow but want to create a new version of the workflow for future activations, click **Copy** from the Workflow List page to create a new version of the workflow. The new version will include the same information as your original workflow (steps, durations, assigned users, welcome memo); however, the workflow name must be different.

Reports on Demand

Click **Reports on Demand** to generate the following type of reports:

- Structured Content Report
- ViewSpace Comments Report

From the Reports on Demand window, you can view a sample of what the report looks like or click the **Submit** button to have the report e-mailed to you as a zip file attachment.

Structured Content Report

Select Structured Content Report to show a comprehensive report of all content in your AuthorSpace environment.

The report pulls all content information such as folder address, ID, the title the content has been assigned, the version number, the type of content, the type of item, and much more. Because the report is provided in a .csv format, you can use spreadsheet functionality to easily filter on comments from specific order sets/plans of care or between certain date ranges Once the report is generated, it should be sent to your email in about five minutes, unless there is a lot of content. If you do not receive your report, please contact Zynx Support.

ViewSpace Comments Report

Select ViewSpace Comments Report to generate a report of all the review comments that have been made to the content in your environment.
The report pulls all ViewSpace comments from active content within your environment. Because the report is provided in a .csv format, you can use spreadsheet functionality to easily filter on comments from specific order sets/plans of care or between certain date ranges.
Don't see a report you need? You can suggest reports by clicking on the "Suggest a Report" link. A form requesting details of the report will open, as well as an option to upload an example of the report you would like.

Control Panel

Click **Control Panel** to display links on the left side of the screen to the following areas, depending on environment and user privileges. The links that can be accessed and navigated from the main screen depend on assigned user permissions. The Control Panel is accessible only to Administrators.

- **Home**: Click this link to access a list of environments authorized for your logon.
- **Environment**: Click this link to customize and maintain the user environment. See Managing Your Environment for additional information.
- **Vocabularies**: Click this link to open the Vocabulary Manager to import and link external vocabulary terms to the equivalent Zynx term. See Working with Vocabularies for additional information.

What's New

Click **What's New** to display announcements from Zynx. Click any announcement to open a new browser window displaying more detailed information about the announcement.

Evidence Monitor

Evidence Monitor is a sortable, filterable Web page listing all references added to ZynxEvidence (this includes the evidence for ZynxOrder and ZynxCare), available from the What's New page in AuthorSpace. It is filterable by content type, module, and page name. The Evidence Monitor includes the following column headers:

- Date - Publication year, month, and day
- Content Type - Medical evidence or interdisciplinary evidence
- Module - The name of the disease/condition or procedure
- Page Name - The name of the Zynx evidence page where the reference resides
- Citation - Reference added to Zynx content
- PubMed/Web/PDF - URL associated with citation

To make best use of the Evidence Monitor, filter for your topic of interest to identify a study, guideline, and/or performance measure in Zynx content.

Terminology Monitor

Terminology Monitor is a sortable, filterable Excel document, available as a link from the What's New page in AuthorSpace. The link is titled **Order Set/Plan of Care**. This document details all new, modified, and inactivated Zynx catalog terms since June 2012. It is searchable and filterable by content type, PIVOT ID, and term description. The Terminology Monitor consists of 3 tabs (i.e., New, Changed, Inactivated) and includes the following column headers:

- Publication Date - Publication year, month, and day
- Content Type - Order Set, Plan of Care
- Status - New, Changed, Inactivated
- PIVOT ID - A Zynx-generated unique identifier assigned to each Zynx term description
- Term Description - Zynx term added, changed (including previous and current term), or inactivated
- Term Type - Term type associated with the added/changed/inactivated Zynx term description
- Reason for Change - Details the nature of the change (Changed tab only)
- Reason for Inactivation - Details the nature of the inactivation (Inactivated tab only)
- Replacement Term PIVOT ID/Description/Type - Suggested term replacement (Inactivated tab only)

The Terminology Monitor can be used to add or map new terms to your catalog, to review changed terms for compliance with your policies, and/or to consider the impact of newly inactivated terms on your content and decide whether to replace or remap.

Guideline Update Schedule

The Guideline Update Schedule is a downloadable Excel file that contains newly released guideline topics and estimated timelines for when those guidelines will be incorporated into Zynx content. These are published on the third Thursday of each month.

Practice Monitor

Practice Monitor is made up of sortable, filterable Excel files listing all changes made to order sets or plans of care due to changes in the evidence, available from the What's New page in AuthorSpace. It is searchable and filterable by condition and intervention. When opening the Excel file, please navigate to the Practice Monitor Tab sheet. The Practice Monitor includes the following column headers:

- Date – Publication year, month, and day
- Group – Category of disease/condition or procedure
- Module – Name of the disease/condition or procedure
- Order Set/Plan of Care Name(s) – Venue/setting
- Patient Problem – Patient problem/condition associated with the module (**ZynxCare only**)
- Section – section/location within the order set (**ZynxOrder only**)
- Zynx Intervention – Zynx order set or plan of care item/reminder
- Change Type – Zynx item/reminder, evidence link, blue ribbon, gold key (added, changed, removed)
- Change Due To:

    o Guideline – Recommendations from national/professional organizations
    o Performance Measure – Performance measures from national/professional organizations
    o Key Clinical Process Evidence – Evidence associated with outcomes related to mortality, admissions, readmissions, length of stay, and/or cost.
    o FDA Safety Alert – Safety alerts from the U.S. Food and Drug Administration (**ZynxOrder only**)
    o Other – Reasons not specified above e.g. reanalysis of evidence)

- Zynx Evidence Page – Evidence page associated with Zynx intervention

To make best use of the Practice Monitor, filter for your topic of interest. To narrow the focus to interventions that are associated with improved clinical or cost-related outcomes and/or performance measures, filter for options associated with "blue ribbon" (performance measures) or "gold key" (improved clinical or cost-related outcomes) in the "How Did Item(s) Change?" column.

Managing Your Environment

Click the **Environment** link from the Control Panel located on the AuthorSpace main screen to manage your environment. This consists of 6 tabs:

- Users Tab
- Teams Tab
- Catalog Tab
- Integration Tab
- Workspaces Tab
- Configuration Tab

Administrators can set up and maintain application users, user permissions, teams, and team access privileges within an environment. The name of your environment appears in the top right of the screen.

Users Tab

The **Users** tab displays a list of users from the local environment in alphabetical order by last name. From the **Users** tab, perform the following tasks:

- **Managing Environment Users**: Click the **Manage** button to open the **Manage Users** screen, where you can add or remove environment members. Environment members have access to AuthorSpace.

  1. To add a member to the environment, select a name in the **Users** list box and click the **Add** button
  2. To remove a member from the environment, select a name in the **Environment** list box and click the **Remove** button.

- **Viewing User Profiles**: Select a name and click the **View** button to open the **User Profile** screen.

  1. The **User Profile** screen shows the profile for the selected user, including name, user name, status, and assigned access privileges for working with teams and vocabularies.
  2. The Teams section shows the content teams that the user is assigned to, as well as the user's access privileges for each team.
  3. To modify the existing information (such as name, title, address, phone number, organization, and e-mail address) of the user or to add new information, click the **Edit** button to open the **Edit User** screen.

- **Editing User Profiles**: Select a name and click the **Edit** button to open the **Edit User** screen, where you can modify user profiles and add e-mail addresses for environment users. You can also click the **View** button to open the **User Profile** screen; then click the **Edit** button. Please note that e-mail addresses are required for all users.

  1. On the **Edit User** screen, modify the user's name, address, phone number, e-mail address, title, organization, etc.
  2. Click **Save** after you update/populate the necessary fields.

Modifying Team Privileges

To modify team privileges, complete the following steps:

1. Open the **Manage Team Privileges** screen from either the **Users** tab or the **Teams** tab:

   o On the **Users** tab, click a username, click the **View** button to open the **User Profile** screen; click a team name in the Team area, and then click the **Privileges** button.
   o On the **Teams** tab, click a team name. Click the **Privileges** button.

   This screen shows the environment users assigned to the selected team and the privileges for each user. The team name appears in the status bar at the top of the **Manage Team Privileges** screen.

2. Select the check box for the appropriate privilege level and click **Save**. Select from the following privileges:

   o **Modify**: A user with Modify privileges can view, print, review, create, duplicate, and edit content, as well as access the functionality available from the **Manager** screen.
   o **Release**: A user with Release privileges can view, print, and review content. A user with these privileges can also release content via the Manager. Releasing content locks the content so that no more changes can be made.
   o **Export**: A user with Export privileges can view, print, review, and export content. Export is only configurable at the base team level.
   o **View**: A user with View privileges can view, print, and review content. This privilege is assigned to all users within an environment by default.

Teams Tab

Use the **Teams** tab for the following tasks:

- Adding Teams
- Managing Members of a Team
- Editing a Team Profile
- Setting/Editing Privileges for Team Members
- Removing Teams

The **Teams** tab displays a list of content teams for the environment. Teams are created within an environment and consist of members of that environment.

Adding Teams

To add a team, complete the following steps:

1. On the **Teams** tab, click the **New** button to open the **New Team** screen.
2. Type a team name in the **Team Name** text box.
3. Optional: Type a description in the **Description** text box.
4. Click the **Save** button.

The new team name appears in the team list on the **Teams** tab.

Managing Members of a Team

To add or remove environment members from a team, complete the following steps:

1. On the **Teams** tab, click a team name to select it and then click the **Manage** button to open the **Manage Team** screen. The **Manage Team** screen shows the following two list boxes labeled Environment Users and Team Members.

   o The **Environment Users** list box shows the full name and username for each member in the environment.
   o The **Team Members** list box shows the full name and username for each team member.

2. To add a member to the team, select a name in the **Environment Users** list box and click the **Add** button. To remove a member from the team, select a name in the **Team Members** list box and click the **Remove** button.

To modify the team's privileges, click the **Privileges** button at the bottom of the **Manage Team** screen. See Modifying Team Privileges.

Editing a Team Profile

To edit a team name or description, complete the following steps:

1. On the **Teams** tab, click a team name to select it and then click the **Edit** button to open the **Edit Team** screen.
2. To modify a team name and description, change the information in the **Team Name** text box and **Description** text box as necessary.
3. Click the **Save** button.

Setting/Editing Privileges for Team Members

To set/edit privileges for team members, complete the following steps:

1. On the **Teams** tab, click a team name to select it and then click the **Privileges** button to open the **Manage Team Privileges** screen.
2. Select the check box for the appropriate privilege level and click **Save**. Select from the following privileges:

   o **Modify**: A user with Modify privileges can view, print, review, create, duplicate, and edit content, as well as access the functionality available from the **Manager** screen.
   o **Release**: A user with Release privileges can view, print, and review content. A user with these privileges can also release content. Releasing content locks the content so that no more changes can be made.
   o **Export**: A user with Export privileges can view, print, review, and export content.

   Note: Export is only configurable at the base team level.

   o **View**: A user with View privileges can view, print, and review content. This privilege is assigned to all users within an environment by default.

Removing Teams
To remove a team, complete the following steps:

1. On the **Teams** tab, click a team name to select it and then click the **Remove** button at the top of the screen.
2. When a message box appears asking whether you want to remove the selected team, click the **Yes** button. (Note: When a team is removed, it is deleted.)

Catalog Tab
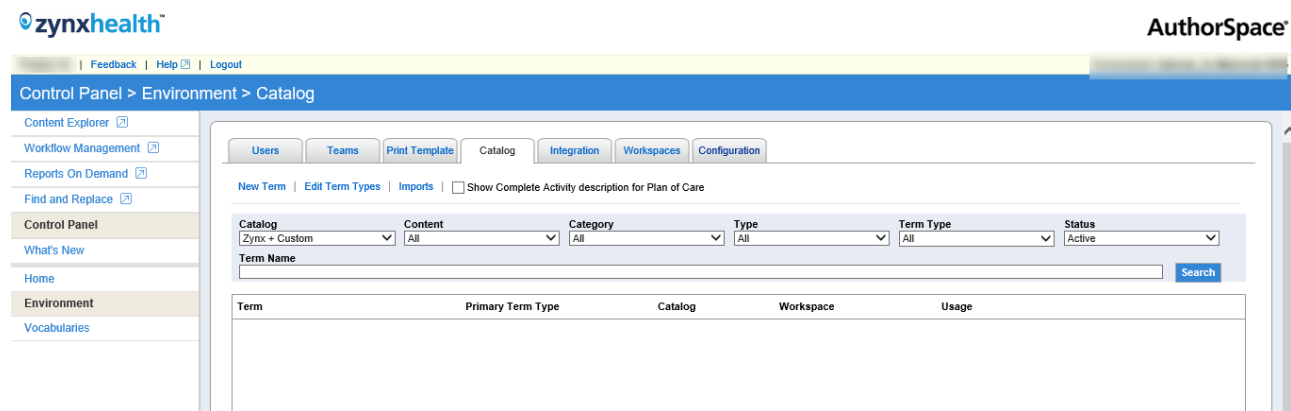
Select the **Catalog** tab to search for orderable and sentence terms in the Zynx, Custom, or Zynx + Custom catalog. New custom terms can be added or imported from this tab.

Searching for a Catalog Term
To search for terms in the Zynx, Custom, or Zynx + Custom catalog, complete the following steps:

1. Populate any of the following fields by selecting the appropriate values from these drop-down lists: Catalog, Content, Category, Type, Term Type, or Status.
2. Type the term in the **Term Name** field.

   o To perform a search, you must either select a Term Type or type at least 2 characters in the **Term Name** field.

3. Click the **Search** button.

The system returns catalog terms using the criteria that you specify. Use the links at the bottom of the screen to page through the results.

Adding Terms to a Custom Catalog
Only Administrators can add terms to the Custom catalog. These steps show how to add individual terms to the Custom catalog manually. If you need to add a large list of terms, consider importing the list. See Importing Terms for more information. To add a term to a Custom catalog, complete the following steps:

1. Click the **New Term** link to open the **New Term** dialog box.
2. Populate the **Term** text box and provide a description for the term in the **Description** text box.

The **Status** field is used to inactivate terms. Keep the status set to Active (the default value) when creating new terms. You cannot change the status of a Zynx term. The **Visibility** field is only available for Zynx terms. Use this field to determine whether the Zynx term is available when you browse for it from a workspace. If

set to Invisible, the term will appear in the Catalog Manager but not when browsing in the catalog from the Editor.

3. Use the **Category** drop-down list to specify the category for the term.
4. Select the **Is Med** check box to indicate that the term is for an orderable item with unique medication properties.
5. Select the term type from the **Term Types** link.
6. Type any specific instructions in the Instructions box. Instructions are environment-specific and can include information about the term, explain why the term is Active or Inactive, or clarify who wants the term added.
7. If you wish to add the term to your vocabulary used for exports, select the vocabulary from the **Vocabulary** drop-down list and then type the External ID (CPOE code for that term). The term will be added to your vocabulary. (You can also add a new term from the **Vocabulary Manager Home** screen.)
8. Click the **OK** button.

The term is now available in the Custom catalog.

Editing a Custom Catalog Term
To edit a Custom catalog term, complete the following steps:

1. From the **Catalog** screen, click the **Edit** link to the right of the term you wish to edit. The **Edit Term** dialog box opens.
2. Type the description text for the term in the **Description** text box.
3. Select the status from the **Status** drop-down list. The **Status** field is used to inactivate terms.
4. Click on the **Term Type** link to select a term type from the list.
5. Click the **OK** button.

Removing a Custom Catalog Item
To remove a term from a Custom catalog, complete the following steps:

1. From the **Catalog** screen, click a term to select it.
2. Click the **Delete** link to the right of the term.

   o Custom catalog terms that are currently being used in content cannot be removed. If you wish to prevent the future use of a term that is currently being used, change the Status field to Inactive.

3. An alert box appears asking whether you're sure you want to delete the term. Click **Yes** to delete the term.

Replacing a Custom Catalog Term

To replace an existing term that is currently used in content, either change the description for the term or inactivate the term and add a new one.

- To change the description for an existing term, see Editing a Custom Catalog Term. This method changes the term in all content that references that term.
- To inactivate the term, see Editing a Custom Catalog Term and change the **Status** field to **Inactive**. To add the new term, see Adding Terms to a Custom Catalog. The inactive term remains in the content that references that term. If you want to replace the inactive term with a new term, manually edit the content to replace the term.

Integration Tab

Select the **Integration** tab to view and configure the XML formats used for exporting content to use with other applications. When configuring the XML format, choose the vocabularies that you want to export your content in, and the order in which vocabularies should be used.

- The vocabularies that are available must first be set up from the **Vocabulary Manager Home** screen. See Working with Vocabularies.

Configuring Exports

To configure an export format, complete the following steps:

1. From the **Integration** tab in the Environment Manager, click the **Configure** link.
2. Select the vendor and system that you want to configure for export and then click the **Next** button.

   o Vendor vocabulary must be available in the **Vocabulary Manager Home** screen first before it can be referenced to export.

3. Select an export format and click the **Next** button.
4. Populate the **Export Vocabularies** list box with the vocabularies that you want to use in your content.

   o To add a vocabulary to the **Export Vocabularies** list box, select a name in the **Environment Vocabularies** list box and click the **Add** link. The vocabularies available in the **Environment Vocabularies** list box are dependent on the selected system.
   o To remove a vocabulary from the **Export Vocabularies** list box, select a name in the **Environment Vocabularies** list box and click the **Remove** link. The vocabulary now appears in the **Environment Vocabularies** list box.

5. Select a vocabulary in the **Export Vocabularies** list box and use the **Up** or **Down** link to indicate the order in which vocabularies will be used in the export file. This step is only necessary if one Zynx term is linked to terms in multiple external vocabularies.
6. Click the **Save** button. You return to the **Integration** tab to view the format you just configured for export.

When you export content, the export formats that you configure in the **Integration** tab will be available as choices in the **Export** dialog box. See Exporting Order Sets and Exporting Plans of Care.

Removing an Export Format

To remove an export format, from the **Integration** tab in the Environment Manager, click the export name to select it and click the **Remove** link.

Generating a Mapping Report

For any content you wish to export, you can generate an Orderable Items report that shows whether Zynx terms are mapped to equivalent concepts in the external vocabulary used in a particular export format. This report lists the order items, PIVOT IDs, and associated external IDs for the content that you wish to export. Use this report to quickly see which Zynx terms still need to be mapped to equivalent concepts in the external vocabulary before you export the content. To generate the report, complete the following steps:

1. From the **Integration** tab in the Environment Manager, select an export name and click the **Mapping Report** button. Content owned and created by the local environment appears in a tree-view structure.
2. Select the content you will be exporting.

   - To select all content, select the check box next to the Our Content folder.
   - To select all content within a subfolder, select the check box next to the folder name.
   - To select individual order sets or plans of care, select the check box next to each item.

3. Click the **Generate** button. A dialog box appears asking if you want to open or save the file.To open the report, click the **Open** button. Otherwise click the Save button to save it and open it later.

The report opens as a Excel spreadsheet, displaying the Zynx terms and assigned PIVOT IDs that appear in the selected content. A value in the External ID column indicates that the Zynx term is mapped to an equivalent concept in the external vocabulary.

Workspaces Tab

Click the **Workspaces** tab to display all the workspaces for the environment. This tab allows you to do the following:

- Create/edit/delete workspaces.
- Create/edit/delete WDFs (fields on a workspace).
- Map workspaces to terms or term types.

A workspace is a collection of data fields (called WDFs, or workspace-defined fields) that, when concatenated in a specific sequence, can comprise a fully specified order sentence (e.g., the Medication workspace contains fields that capture dose, route, and frequency).

Order sentences may need to be displayed in a certain way for your paper order sets or vendor CPOE. Zynx offers configurable workspaces to give you flexibility in displaying order sentences. With configurable workspace functionality, you can create or modify workspaces by controlling the fields that appear and the order in which they appear. You can even create new fields (or WDFs) to add to your workspaces.

This customization allows you to track information specific to your environment and minimizes the amount of time it takes to localize an order set for your environment's paper order sets or vendor CPOE.

All configurable workspaces for an environment are based on existing Zynx Medication workspaces or Zynx non-medication workspaces. Users can assign (map) workspaces to individual terms, such as penicillin, or to an entire term type, such as medications. When users add an item in the Content Editor, the associated configurable workspace is displayed to the user for editing. Newly created workspaces are available to mapped terms in checked-in customized content that has not been released or retired.

Searching
You can search without specifying search criteria. The system searches for each word in the **Name**, **Description**, and, **Term** field, independent of order.

Creating a New Workspace
To create a new workspace, complete the following steps:

1. From the **Workspaces** screen, click the **New Workspace** link to open the **Create Workspace** window.
   You may use an existing workspace as a template for building your new workspace. Doing so will add all the WDFs from the existing workspace to your new workspace. WDFs in these templates can be deleted or modified at any time. To use an existing workspace as a template, see step 2; otherwise, skip to step 3.
2. Optional: If you wish to use a pre-existing workspace as a template for building your new workspace, click the **Template** ellipses button to view/search a list of all the workspaces that are available for the environment. Click a workspace from the list to select it and then click the **Select** link.

3. In the **Name** field, type a name for the new workspace. This field is required. The maximum length

is 50 characters. Names must be unique for each workspace.

4. Optional: In the **Description** field, type a description of the workspace. The maximum length is 255 characters.
5. Click the **Save** button. The new workspace opens and is ready for editing.

After you create a workspace, you may assign the workspace to an individual term or a term. type. See Mapping Individual Terms or Term Types to a Workspace. You can add additional WDFs to the workspace or edit the existing WDFs.

Adding a WDF to a Workspace

To add an existing WDF to a workspace:

1. From the **Workspaces** screen, either click the **Check Out** link or click the **Edit** link next to an already checked-out workspace to open the editing screen.
2. Click the **Add Field** link to open the **Add WDF** window. This window displays a list of existing WDFs that match search criteria. If you need to create a new WDF so that it is available in the **Add WDF** window, follow the steps outlined in Creating a WDF.
3. In the Search Results area of the **Add WDF** window, select the WDF and click the **Add to Workspace** button.
4. After you finish adding all the WDFs, either click the red **x** at the top right corner of the **Add WDF** window or click the **Cancel** button at the bottom of the window to close the **Add WDF** window. The WDF appears in the existing list of fields in the **Workspace** fields area.

Editing a Workspace

On the **Workspaces** screen, click the **Edit** link next to a checked-out workspace, or click the **Check Out** link to check out the workspace to display the following screen.

In the information area, you can modify the name or description. If the workspace is built from a template, the template name appears in this area. The template name cannot be modified.

- Click the **Preview Workspace** link to preview the workspace. Default values will appear in the preview.
- Click the **Update** button to apply any changes to the **Name** and **Description fields**.

In the Workspace fields area, a list of WDFs for the workspace is displayed.

- You can edit WDFs. See Modifying a WDF.
- You can delete the WDFs. See Removing Workspaces or WDFs.
- You can add WDFs. See Adding a WDF to a Workspace.

Deleting a Workspace

You can delete any checked-in workspace. On the **Workspaces** screen, select the workspace and click the **Delete** link.

Managing WDFs

From the **Workspaces** screen, click the **Manage Fields** link to display the **WDF List** screen that shows a list of WDFs that are available for the environment. From this window, you can create, edit, or delete WDFs.

- To create a new WDF for the environment, click the **Create Field** link. See Creating a WDF.
- To modify an existing WDF, click the **Edit** link. See Modifying a WDF.
- To remove existing WDFs, click the Delete. See Removing Workspaces or WDFs.

Creating a WDF

To create a new field that can be added to a workspace, click the **Manage Fields** link and then click the **Create Field** link. Complete the following areas of the **Create WDF** screen:

1. Type the name of the WDF in the **Name** field. This is a required field. The maximum length is 50 characters.
2. Type the label in the **Label** field. This is a required field. The label is what appears next to the WDF within the workspace.
3. Type the Integration ID in the **Integration ID** field. This field is optional.
4. Type a description in the **Description** field. This field is optional and has a maximum length of 255 characters.
5. In the **Type** drop-down list, select the type of workspace field you want to create. Choose from the following four types:

   o **Text**: This is the default field type. The field has a maximum length of 255 characters and allows the text to be viewed in one line.

   o **List**: In the workspace, this type of field will appear as a drop-down list box. If you select this

type, click **Manage Sources** button on the right of the **Create WDF** screen. Select a term type from the **Available Types** list box and then click the **Add** button to add it to the **Assigned Types** list box. Click the **Save** button to add the types to the **Sources** box at the bottom of the screen.

- o **Checkbox**: In the workspace, this type of field will appear as a check box so that the option can be enabled or disabled. You can set the default value to appear as either enabled or disabled.
- o **MultiText**: This field has a maximum length of 250 characters and allows the text to be viewed in multiple lines.
- o **Integer**: This field has a maximum length of 250 characters and must be a valid integer.
- o **Decimal**: This field has a maximum length of 250 characters and must be a valid decimal.
  Note: For the numerical value types, if the values are too large they will not be valid. The Type cannot be edited later.

6. Specify the Default Value. Specify the value that should be displayed by default.
7. (Optional) In the **Map to Zynx WDF** drop-down list, select the Zynx WDF you wish to map to.
8. Click the **Save** button.

Modifying a WDF
You can edit a WDF within the context of a workspace or outside the context of the workspace. To edit a WDF within the context of a workspace:

1. From the **Workspaces** screen, click the **Edit** link next to a checked-out workspace.
2. Click the **Edit** link next to the WDF in the Workspace fields area to open the **Edit WDF** window. Modify the areas of the **Edit WDF** window as appropriate.

   Within the context of a workspace, you can specify the text that will appear before and after the default value specified for the WDF by using pre-tag and post tag text. Pre-tag is text that will appear before the default value, and post tag text will appear after the default value for the WDF. By default, the WDF will be rendered as a sentence in the Editor, but you can disable the **In Sentence** check box.

To edit a WDF outside a workspace:

1. Click the **Manage Fields** link to open the **WDF List** screen.
2. Click the **Edit** link next to the WDF.
3. Modify the name, description, and other areas of the **Edit WDF** window as appropriate.

Removing Workspaces or WDFs
From the **Workspaces** screen or the **WDF List** screen, click the **Delete** link next to the workspace or the WDF that you wish to delete.

Mapping Individual Terms or Term Types to a Workspace
Workspaces can be mapped to either a term or a term type.

See Mapping Individual Terms to a Workspace and Mapping All Existing Terms in a Term Type to a Workspace.

Mapping Individual Terms to a Workspace

To assign terms to a workspace, complete the following steps:

1. On the **Workspaces** screen, click a workspace and then click the **Map** Terms link.
2. Select the **Map By Term** tab at the top of the screen.
3. Select a type from the **Type** drop-down list or populate the **Search Text** field.
4. Click the **Search** button. The results are displayed in the list box.
5. In the results list, click one or more terms to select them. Click the **Map** button to map the term(s) to the workspace selected in step 1. Select the **Unmap Term** tab to **unmap** the term and workspace.
6. Click the **Close** button.

Mapping All Existing Terms in a Term Type to a Workspace
To assign a term type to a workspace, complete the following steps:

1. On the **Workspace** screen, click a workspace and then click the **Map Terms** button.
2. Select the **Map By Type** button at the top of the screen. Select a type from the **Select Type** drop-down list. Click the **Map** button.
3. Click the **Close** button.

When terms are added to a term type in the future, those terms will not be mapped to the workspace automatically. You must manually map the new terms to the workspace.

Content That Requires Attention

March 2019

Whenever you edit and check in a workspace or map/unmap terms, the system will automatically verify that content is not affected elsewhere. If content is affected, a dialog box will appear, asking if you want to delete or edit the workspace. If you click OK, a list of content affected by the change will be displayed. The content will not be automatically changed, so you must open each piece of content and resolve the issues manually. Click **Content Explorer** and navigate to the affected order set or plan of care, which will be marked by a red triangle ( ). When you open the order set or plan of care, the line items requiring attention will be highlighted in red.
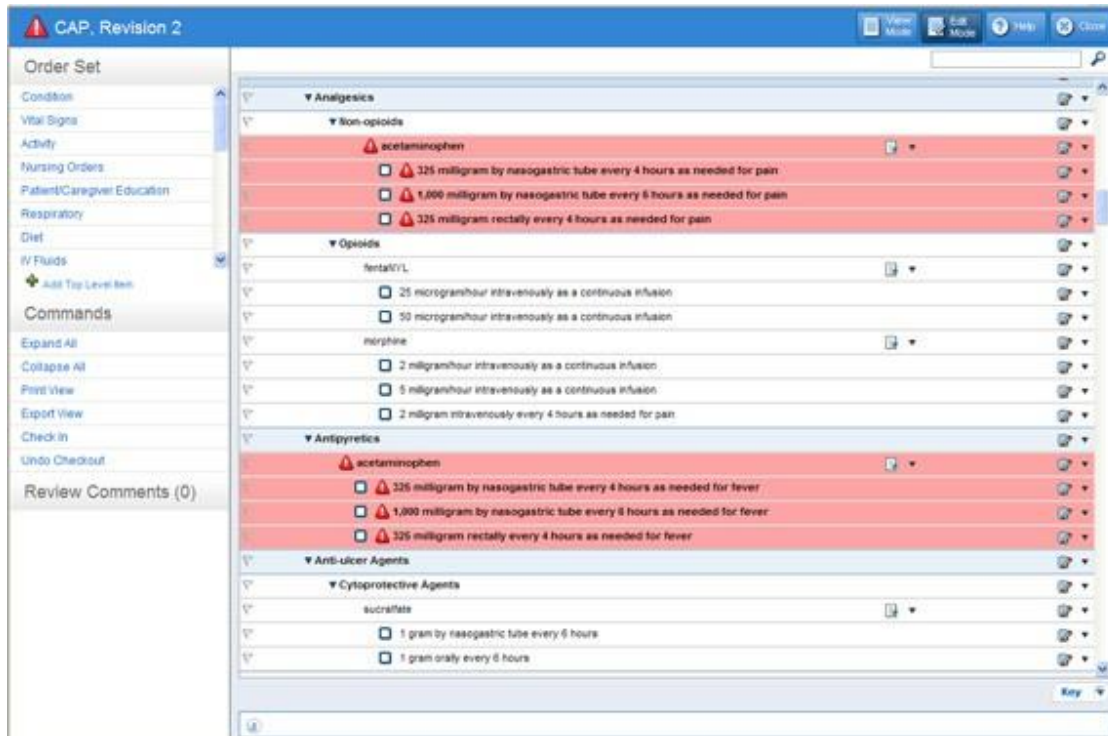
A change to an orderable item with details does not generate an alert unless the new orderable is associated with a different workspace.

Configuration Tab

Click the **Configuration tab** to display various configuration options and settings for your environment.

ViewSpace Login

ViewSpace is a feature in AuthorSpace that allows users without AuthorSpace accounts to view and review **order sets** and **plans of care**. The ViewSpace login options in the **Configuration tab** allow administrators to decide how reviewers access the order sets using either credentials or e-mail clickthrough.

- **Require credentials with each access**: When this option is set, anyone accessing the Order Set or Plan of Care through a link must provide their first name, last name, e-mail, and facility before being allowed to review the Order Set or Plan of Care.
- **Allow e-mail click-through confirmation**: When this option is set, anyone accessing the Order Set or Plan of Care through a link can make a review. The link will ask if they are a certain reviewer. If not, they will list the reviewers for that Order Set and Plan of Care and the reviewer will be able to choose which reviewer he or she is.

Working with Order Sets

Order Sets are collections of orderable items based on venue of care and a condition or procedure. AuthorSpace allows clients to work with Zynx default order sets and customized order sets for their hospital, health system, or primary care facility.

Order Sets are available via the **Content Explorer** menu on the AuthorSpace main screen. See Content Explorer for additional information.

Zynx Default Order Sets

Zynx default order sets are organized by module subfolders within the Zynx folder in the Content Tree. When you select a folder, the contents of the folder appear in the content list on the right side of the screen. Hover over the desired order set and click on the following links to perform these tasks:

- Compare: Compare two order sets and display the differences between them.
- Duplicate: Create a copy of the selected order set.
- **Order Set Content Title**: View the order set.
- Print: Save and print the selected order set.
- Export: Export the selected order set in XML and to create a report with relevant details about the build.

Note: Users cannot edit or manage Zynx order sets.

Custom Order Sets

With AuthorSpace, clients can create custom order sets for their environment or organization by adding new order sets or by editing or copying existing order sets. A lock appears next to the order set in the content list to indicate it is checked out for editing. No one else can see the changes until the user checks in the order set after he or she completes his or her edits. In addition, no one else can edit a checked-out order set.

Custom order sets reside in the Our Content folder in the Content Tree. When you select a folder, the contents of the folder appear in the content list on the right side of the screen. Hover over the desired order set and click on the following links to perform these tasks:

Note: The links that are available depend on the assigned user permission levels established in the Environment Manager.

- Compare: Compare two order sets and display the differences between them.
- Duplicate: Create a copy of the selected order set.
- Edit: Customize the selected order set. A lock icon next to an order set in the content list indicates it is checked out for editing. To display who the order set is checked out to, hover your mouse over the lock icon. Other users will not see the changes until the order set is checked back in.
- **Order Set Content Title**: View the order set.
- Manage: Manage information about the selected order set. In the Manager, you can edit the header, release the order set, make the order set reviewable, and manage/set the reviewers of the order set. You are also able to mark the order set as linkable content (once it has been released) and publish the order set to ViewSpace. The Content Manager also displays information such as the review status, comments, as well as its update history.

- **Review**: Leave review comments for any content in Review status. When you click the **Review** button, the order set opens the reviewer pane for adding comments.
- **Check In**: Check in the selected order set with your changes applied.
- **Undo**: Check in any selected checked-out order set without applying any changes. If you click this link after making changes to the order set, all your changes will be lost.
- **Print**: Save and print the selected order set.
- **Export**: Export the selected order set in XML and to create a report with relevant details about the build.
- **Delete**: Delete a selected order set.

Adding New Order Sets

To add a new order set for your environment, complete the following steps:

1. At any location in the Content Tree, click the **New Content** link at the top of the content list to open the **New Content** dialog box.
2. In the **Content Title** text box, type the name of the new order set.
3. From the **Content Type** drop-down list, select Order Set, Plan of Care, or External File.
4. From the **Select Module** drop-down list, select a module.
5. Please select the folder on the left where you want to save the order set.
6. Optional: Check the **Open in editor after creating**. Selecting the Open in editor after creating check box automatically opens the new order set in the Content Editor for immediate editing after you click **Create** in step 7. If you do not select this check box, the system will put you in the content list with the new order set already highlighted. Click the **Edit** link at the top of the content list.
7. Click the **Create** button to create the order set.

For information on editing the order set, see Customizing and Editing Order Sets. You can also add a new order set by duplicating an existing order set. See Duplicating Order Sets.

Comparing Order Sets

The compare functionality allows you to compare two order sets and display the differences between them. Comparisons can be made between two Zynx order sets, two custom order sets, or a custom order set and a Zynx order set. In the comparison, a Baseline order set is compared to a New order set.

During set up of the compare feature, the user specifies which order set is to be the Baseline order set and which is to be the New order set. The Baseline order set is the primary order set that is used as the basis for comparison. The New order set is the secondary order set, and you can edit the New order set to match the Baseline. For example, many clients periodically compare a custom order set with the latest Zynx order set. In this case, the custom order set is the New order set and the Zynx default order set is the Baseline order set.

Items from the Baseline order set may be copied into the New order set if the New order set is editable. Only the New order set can be updated—you can copy items from the Baseline order set over to the New order set, but you cannot copy items from the New order set to the Baseline.

The New order set is editable or read-only based on its status and the user's edit privileges. A New order set with any of the following edit statuses is opened in read-only mode:

- Draft but checked out by another user
- Released
- Review
- Retired

This feature compares orderable items and their associated Item Details, including Linkable Content, between the two order sets. Section headings, sub-headings, and reminders are not compared. Reminders are displayed in the results but are not comparable. Linkable and non-linkable content is compared and displayed.

Orderable Items refer to both Medication and Non-medication order items. Medication order items may only be compared to other Medication order items, and Non-medication order items may only be compared to other Non-medication order items.

Order items are comparable if any of the following are true:

- Order items share the same PIVOT ID
- Order items share the same custom PIVOT ID
- Order item PIVOT IDs are mapped to each other via a client's custom PIVOT ID

If the order item in the Baseline order set does not have a PIVOT ID, the order item will be compared to all order items in the New order set using a text-to-text method. Items are considered comparable when an exact text match is found.

Evidence links are determined to be equal based on comparing the following attributes in the specified order:

- Evidence Type – If one Evidence Item is of type Common Practice, and the other is of type Zynx Evidence or Custom Evidence, they are not considered equal.
- Evidence URL – If both Evidence links have the same URL, they are considered equal, even if one link is a **Zynx Evidence** link and the other is a **Custom Evidence** link.

To compare two order sets:

1. Hover over an order set and click the **Compare** link.
2. In the dialog box that appears, specify the following and click **OK**:

   o Specify whether you want the selected order set to be the Baseline or the New order set
   o Specify whether to include the item details in the comparison

3. Select a second order set for comparison from the Select Baseline Content screen and click **OK**.
4. A dialog box appears confirming the order sets you have selected for comparison. You can choose to compare the order sets as you have selected them, swap them and then compare them, or cancel the comparison. Click **OK**.

The **Comparison Result screen** displays the Baseline and New order sets side by side. Click the **Color Key** button to display a dialog box showing a description of the color coding used in the comparison.
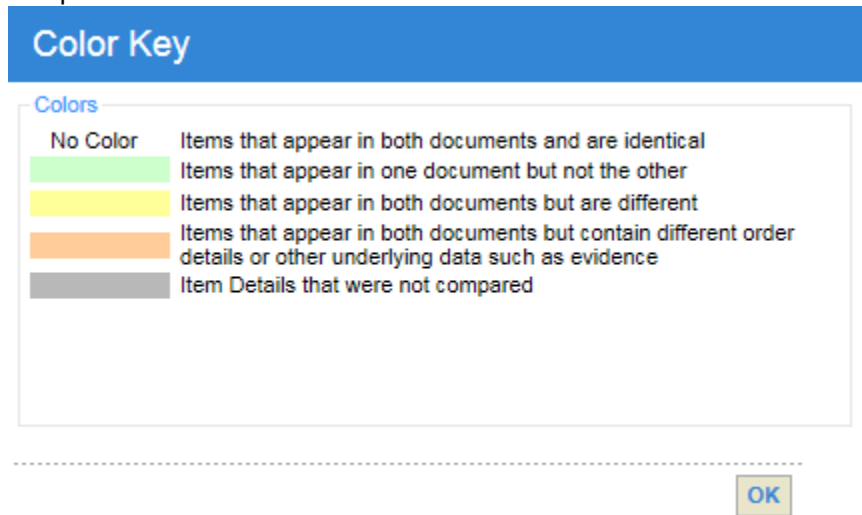
Click a link at the bottom of the screen to perform any of these tasks:

o   **Copy To New**: Select an item in the Baseline order set and click the **Copy To New** link to copy the item into the New order set.

> Only the New order set can be updated. Items from the Baseline order set may be copied into the New order set if the New order set is editable.

> You cannot copy cross-linked content (order set content included in a plan of care as linked content, or plan of care content included in an order set as linked content) from the Baseline order set into the New order set.

o   **Undo**: Undo previous edits one at a time.
o   **Edit**: Open the New order set in the AuthorSpace Editor. See Customizing and Editing Order Sets. You cannot edit cross-linked content.
o   **Check In**: Check in the New document with any changes applied.
o   **Print**: Print the **Comparison Result** screen. You can choose to print the entire contents of both order sets or you can only print the differences. The differences are displayed in the following sort order: items that are in the New order set but not the Baseline, items in both, and items in the Baseline that do not appear in the New order set.
o   **Save & Close**: Saves the changes and closes the **Comparison Result** screen.
o   **Cancel**: Close the **Comparison Result** screen and start over.

Using the Content Viewer

To open the Content Viewer, you can either select content from the content list or just click on the **View Mode** button at the top of the Content Editor
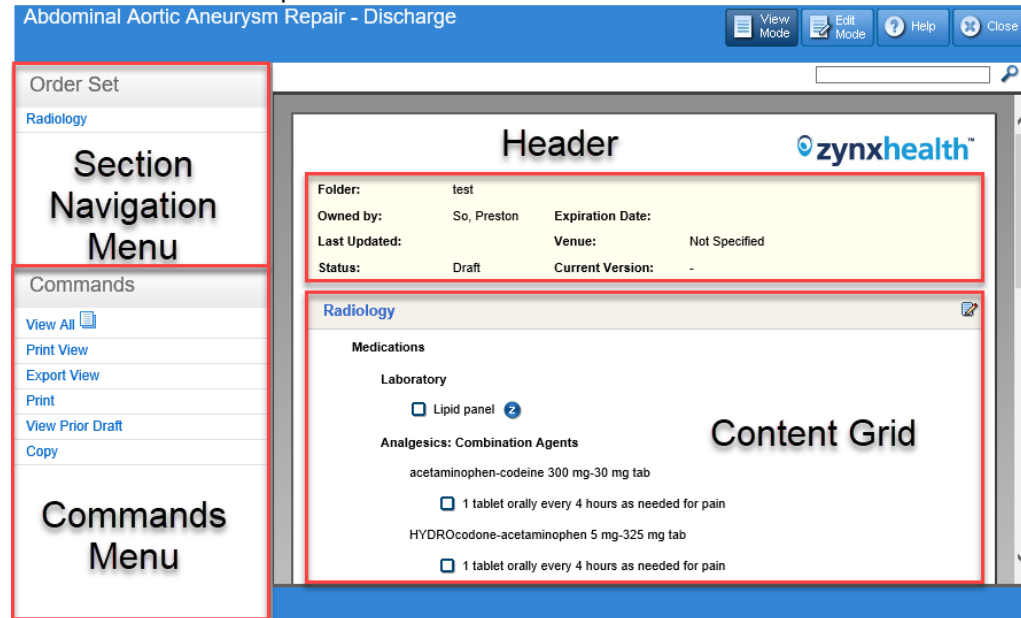
The left pane of the Content Viewer displays the following menus:

- **Section Navigation Menu**: Includes top-level sections of the content. Click any section to bring it in focus in the content grid.
- **Commands Menu**: Displays commands for interacting with the content in the content grid. Available commands include View All, Print View, Export View, Print, View Prior Draft/View Working Draft, Export, or Copy commands, depending on user permissions.

  - **View All**: Displays all items.
  - **Print View**: Displays all items except those marked for export only.
  - **Export View**: Displays all items except those marked for print only.
  - **Print**: Allows the user to apply a print template and print the order set
  - **View Prior Draft/View Working Draft**: Allows you to toggle between the version you are currently editing and the version that was previously checked in.
  - **Copy**: Allows a user to copy children items through their parent header. Cannot copy a child item by themselves.

  Instructions for accessing commands from this menu will be written as, for example, "Click **Print** from the **Commands Menu**."

The right pane of the Content Viewer displays the content (order set or plan of care) in a content grid. It shows order items for individual Sections, such as Vital Signs, Activity, Nursing Orders, etc. Icons within the content grid allow you to view Evidence, Drug Information, or Notes/Tasks associated with a selected item. For more information on the available icons, see Content Viewer/Editor Icons.

You can search for terms within the content by typing a term in the Search box and then clicking the Search icon (🔍) or pressing the **Enter** key. This feature is helpful to find terms that you wish to edit. You can search for any terms within displayed text. The Viewer takes the user to the first item that has a match. To cycle through all the results that match, press CTRL+F3 or click on the Search Next icon (🔍). When there are no matches found, a message appears indicating this information. To start a new search, simply type a new term in the Search box.

Content Viewer/Editor Icons

The following icons appear in the Content Viewer and Editor. A list is also available by clicking the **Key** icon (Key ▼) in the Content Editor.

Editor Icon	Description
Drug Information	Depending on your licensing agreement, you may have access to either First DataBank, Inc. or Multum drug information, such as Warnings, Monographs, Disease Interactions, Packaging, and Pricing. Click on this icon to access drug information. Or click the arrow to the right of the icon and select the desired information.
Performance Measures	This icon appears next to order items and reminders that address a performance measure defined by a national organization. Click or hover over the icon to see the name(s) of the specific organization associated with the performance measure. The specific information for the performance measure is cited in the corresponding clinical evidence.
Comments	Comments about the current order set or plan of care
Notes	Click this icon to read the Note or Build Note associated with the item. In the Editor, open the Workspace Editor for the item and select the **Notes** tab to view the Note or Build Note.
Tasks	Click this icon to view the Task associated with the item. In the Editor, open the Workspace Editor for the item and select the **Tasks** tab to view the Task.
Linkable	This icon appears next to inserted linkable content. Please see Adding Linkable Content to an Order Set, Adding Linkable Content to a Plan of Care
Virtual Linkable	This icon appears next to virtually inserted linkable content. Virtual linkable content is just like linkable content but only the name is displayed, not the contents of the virtual linkable. Please see Adding Linkable Content to an Order Set, Adding Linkable Content to a Plan of Care

New Evidence	Click this icon to launch a browser window displaying the supporting Zynx clinical evidence linked to the item. Evidence is reviewed for updates every 6 months. If there is an updated version of Zynx Evidence available, this icon appears instead of the Zynx Evidence icon. In the Viewer, click the Evidence link and then view the new evidence by clicking the "newer version" link within the red text at the top of the evidence page. Although the new evidence is viewable from the Viewer, it is not applied to the content until it is accepted in the Editor. In the Editor, accept new evidence in the following manner: ▪ Click the **New Evidence** icon. In the dialog box that appears, indicate that you wish to update the evidence. The **New Evidence** icon reverts to the **Zynx Evidence** icon after you accept the new evidence. To view the new evidence from the Editor without applying it to the content, click on the **New Evidence** icon. Click the **No** button in the confirmation dialog box to open the evidence page. Click the "newer version" link within the red text at the top of the evidence page.
Zynx Evidence	This icon indicates that the order item is linked to supporting Zynx clinical evidence. Click the icon to access the evidence page, which reflects the standards at the time the order set item was linked to it. If a newer version of the evidence exists, the **New Evidence** icon () icon appears instead of this icon. Evidence is reviewed for updates every 6 months. In the Viewer, click the **New Evidence** icon and then view the new evidence by clicking the "newer version" link within the red text at the top of the evidence page. Although the new evidence is viewable from the Viewer, it is not applied to the content until it is accepted in the Editor. In the Editor, accept new evidence in the following manner: ▪ Click the **New Evidence** icon. In the dialog box that appears, indicate that you wish to update the evidence. The **New Evidence** icon reverts to the Zynx Evidence icon after you accept the new evidence. To view the new evidence from the Editor without applying it to the content, click on the **New Evidence** icon. Click the **No** button in the confirmation dialog box to open the evidence page. Click the "newer version" link within the red text at the top of the evidence page.

Evidence is withdrawn	This icon indicates that the Evidence for that item has been retired/withdrawn.
Custom Evidence	When available and warranted, an item may be linked to a third-party Web site that contains information relevant to the intervention. In these cases, this icon will appear along the right margin. When the icon is clicked on, the user will be taken to the third-party site.
Zynx Term	This icon indicates that a term originates from the Zynx catalog. When the Zynx term is present in a drop-down list, [Z] appears after the term.
Custom Term	This icon indicates that a term originates from the custom catalog. When the custom term is present in a drop-down list, [C] appears after the term.
Activity Detail	This icon signifies activity details within a plan of care (e.g., Blood pressure, Heart rhythm).
Outcome	This icon signifies expected outcomes within a plan of care (e.g., Able to tolerate oral medications).
Problem	This icon signifies a problem within a plan of care (e.g., Pain – Acute).
Print Only	Items marked with this icon will not be displayed in the content grid in Export View and will not export.
Export Only	Items marked with this icon will not be displayed in the content grid in Print View and will not print.
Optional Content	At the point of care, the box is empty, and the clinician can choose whether to check the box.

Default Content	At the point of care, the box is checked by default, but the clinician can choose to uncheck the box.
Required Content	At the point of care, the box is checked by default, and the clinician cannot uncheck the box.
Reminder	Information included in an order set or plan of care that serves as an evidence-based note to the clinician at the point of care.
Error	Content issues that need to be resolved.
Edit	In the Content Viewer, click this button to switch to Edit Mode. In the Content Editor, click this button to open the Workspace Editor.
Options	This arrow icon appears to the right of the **Edit** button or the **Drug Information** button in the Content Editor. Click this arrow to access a list of options.
Key Clinical Processes	This Key Clinical Process icon indicates that an item has evidence that supports improved outcomes related to mortality, admissions, readmissions, length of stay, and/or cost. Hover over the icon to display a tooltip indicating the outcome supported by the evidence. Click the icon to access the evidence page to find out more about the supporting evidence.
Red Text	Inactive catalog term

Managing an Order Set with the Content Manager

To manage an order set, select any checked-in order set from the content list and click **Manage** to open the Content Manager. The Content Manager shows the following information:

- Links at the top of the screen enable users with appropriate permissions to change the status of the order set (depending on the current status, you may see links for Release, Retire, Revert to Draft, or Make Reviewable), or request a review of the order set and manage the reviewers.
- Check boxes at the top of the screen enable users to mark the order set as a linkable order set, or to publish the order set to ViewSpace so that it is accessible Zynx Health Reference Site users. Order Sets published to ViewSpace are noted by the ⬚ icon in the content list (see Content Explorer).
- The header information at the top of the **Content Manager** screen shows details about the order set, such as expiration date, venue, assigned team, etc. To edit any of the header information, click the **Edit Header** button at the top of the **Content Manager** screen. See Editing Order Set Header Information.
- The Review Status section shows a list of review requests. The request date, the name of the reviewer, the status of the review, and the review date are displayed.
- The Order Set Reviews sections displays the review date, the reviewer, and the general review comments.
- The Order Set History section shows major changes made to the order set, the user who made the change, and the date and time the change was made. The most recent changes are listed first.

Perform the following tasks with the Content Manager:

- Editing Order Set Header Information
- Initiating/Requesting a Review for an Order Set in the Content Manager
- Checking the Status of a Review for an Order Set in the Content Manager
- Managing Reviewers for an Order Set in the Content Manager
- Viewing Review Comments for an Order Set in AuthorSpace
- Changing the Status of an Order Set
- Marking the Order Set as Linkable Content

Editing Order Set Header Information

The top of the **Content Manager** screen shows header information for the order set. To edit any of the header information, complete the following steps:

Note: Only administrators or Environment Managers can make edits in the Edit Header screen.

1. In the Content Manager, click the **Edit Header** link to open the **Edit Header** screen.
2. Edit any of the following fields/areas:

   o **Rename**: This field allows you to rename the order set. Type a new name for the order set in the field.
   o **Expiration Date**: This is the date the order set expires. Click the calendar icon and select the appropriate date or type a date in the field using any of the following 10-character formats: MM/DD/YYYY, MM-DD-YYYY, or MM.DD.YYYY
   o **External ID**: Type a new external ID for the order set. The external ID is optional, depending on your environment. This ID is output in an export file.
   o **Comments**: Type new comments or edit existing comments for the order set as necessary. Comments are unique to the environment.

- o **Edit Module**: Click in the **Change Module To** drop-down list and select from the list to change the module that the order set applies to.
- o **Edit Institution**: Select an institution to associate to the order set from the **Change Institution To** drop-down list.
- o **Edit Venue/Edit Event**: Click in the **Change Venue To** drop-down list and select from the list to change the clinical location for the order set. Click in the **Change Event To** drop-down list and select from the list.
- o **Edit Team/Edit Owner**: Click in the **Change Team To** drop-down list and select from the list to change the team assigned to the order set. Click in the **Change Owner To** drop-down list and select from the list to change the owner of the order set.

The status of the order set determines which fields can be edited.

- o **Draft order set**: Edit all the fields
- o **Released order set**: Edit the expiration date, comments, team, and owner fields.
- o **Change Module To**, **Change Venue To**, and **Change Event To** fields are not available for editing.

3. Click the **Save** button.

Initiating/Requesting a Review for an Order Set in the Content Manager
You can set up an order set so that it may be reviewed by other users in the environment. You can send a request via e-mail to select users asking them to review your order set. To initiate this review, you must change the status of the order set to Review and then publish the order set to ViewSpace so that it is accessible Zynx Health Reference Site users. To initiate the review of an order set, complete the following steps:

1. Hover over the desired order set and select Manage. In the Content Manager, click the **Make Reviewable** link. This changes the status of the order set to Review. Once the order set has this status, comments/feedback from reviewers may be added, pertaining to the entire order set or to a specific order item within the order set. To add comments, see Adding a Review Comment to an Order Set in AuthorSpace.
2. Select the **Publish to ViewSpace** check box. This publishes the order set to ViewSpace so that it is accessible to Zynx Health Reference Site users.
3. To request a review, click the **Request Review** link at the top of the screen to open the **Request Review** dialog box. Complete the fields in the dialog box.

- o Click **To** and select one or more reviewers from the system address book or click **New Reviewer** to create a new reviewer in the **New Reviewer** dialog box. See New Reviewer Dialog Box.
- o Compose a message to the reviewers in the **Message** text box.

4. Click **Send** to send the request via e-mail to the specified reviewer(s). The e-mail includes a link to the order set. The e-mail request also lists all individuals to whom a review request was sent, and the e-mail address of the user who initiated the review request.

To check the status of the review, refer to the Review Status section of the **Content Manager** screen. See Checking the Status of a Review for an Order Set in the Content Manager.

Select E-mail Screen
Search for a reviewer from the system address book. Reviewers, distribution lists, teams, and authors are displayed in an alphabetized list.

Complete the fields at the top of the **Select E-mail** screen and click **Perform Search**.

New Reviewer Dialog Box
To add a new reviewer to the address book for an environment, fill out the **New Reviewer** dialog box. Specify the first and last name of the reviewer, as well as the reviewer's e-mail address, and then click **Save**.

If the name and e-mail address already exist in the system, a message appears indicating this.

Checking the Status of a Review for an Order Set in the Content Manager
You can check the status of a review in the **Content Manager** screen.

In the Content Explorer list, select the order set being reviewed and then click **Manage** to open the **Content Manager** screen. Scroll down to the Review Status section near the bottom of the screen to view the request date, the name of the reviewer, the status of the review, and the review date.

ViewSpace Notifications
When you initiate a review, you are automatically signed up to receive ViewSpace Notifications. ViewSpace Notifications arrive via a daily digest e-mail delivered between 3:30 and 5:30 AM PST and include any comments or replies that were made within the previous 24 hours on content that you sent for review.

Reviews can be generated in 3 ways:

- Request a review through the Content Manager.
- Activate content with a review step through Workflow Management.
- Add a reviewer through the Track Progress page in Workflow Management by editing the People.

E-mails are sent only if a comment is added to the content you sent for review. If no comments or replies have been added since the last notification, a new e-mail will not be sent.

You will be subscribed to ViewSpace Notifications for as long as the content remains in Review status. Once the status changes to Draft or Released, you automatically stop receiving ViewSpace Notifications for that order set or plan of care.

A sample e-mail notification appears below:

- **Link to content in ViewSpace**: Access the content in ViewSpace. This will provide the additional context needed to understand the comments. If you are using a text-only e-mail client, and the ViewSpace link does not work, copy and paste the URL into a Web browser.
- **Unsubscribe**: Unsubscribe from any notifications regarding this order set. To re-subscribe, contact Zynx Product Support.
- **Global Unsubscribe**: Unsubscribe from all ViewSpace Notifications. To re-subscribe, contact Zynx Product Support.
- **Submit feedback regarding ViewSpace Notifications**: Report defects, suggest changes, and provide other comments related to this enhancement directly to Zynx Product Support.

Managing Reviewers for an Order Set in the Content Manager
Users with appropriate permission can create or edit a registered reviewer or a distribution list.

- "Author" refers to an individual who is an AuthorSpace account holder (AuthorSpace user).
- "Reviewer" refers to an individual who is not an AuthorSpace account holder but who is invited to provide feedback on an order set or plan of care.
- A distribution list is a named collection of reviewers that can be used to facilitate sending a review request to a group of people. It is like an e-mail mailing list and is global to a client environment. It is composed of a group of registered reviewers and/or authors.

Creating a Reviewer for an Order Set in the Content Manager
Users with appropriate permission can create a reviewer. To create a reviewer, complete the following steps:

1. In Content Explorer, select an order set and then click the **Manage** link to open the **Content Manager** screen.
2. If a user does not have correct permission, the **Manage** link will be unavailable. Click the **Manage Reviewers** link at the top of the screen. The **Manage Reviewers** main screen opens and displays an address book of reviewers, authors, teams, and distribution lists for the client environment.

3. Click **New Reviewer** to open and complete the **New Reviewer** dialog box to create a registered reviewer. Specify the first and last name of the reviewer as well as the e-mail address and then click **Save** to return to the **Manage Reviewers** main screen. If the e-mail address already exists in the system, an error message is displayed indicating that the e-mail address is already registered to another user. The alert also lists the role (Author or Reviewer) associated with the account. Correct the data or cancel and close the **New Reviewer** screen.

4. Click **Close** in the upper right corner to close the **Manage Reviewers** screen.

You have created a new registered reviewer whose name will appear in the address book.

Editing a Reviewer for an Order Set in the Content Manager

Reviewers can be edited by users with Administrator or Environment Manager privileges; however, Authors and Teams cannot be selected for editing in the address book unless the Author or Team does not have a name or e-mail address available. To edit a reviewer, complete the following steps:

1. In **Content Explorer**, select an order set and then click the **Manage** link to open the **Content Manager** screen.

2. If a user does not have correct permission, the **Manage** link will be unavailable. Click the **Manage Reviewers** link at the top of the screen. The **Manage Reviewers** main screen opens and displays an address book of reviewers, authors, teams, and distribution lists for the client environment.

3. Double-click a reviewer from the address book or single-click a reviewer and click **Edit** at the top. The **Edit Reviewer** screen opens.

4. Edit the desired field and click **Save**. Reviewer information is updated and validated according to the following:

   o A reviewer is uniquely identified by the combination of e-mail address and client environment. Therefore, an e-mail address may be associated with only one Reviewer within a given client environment.

   o An AuthorSpace account holder may not be entered into the system as a reviewer, but an AuthorSpace account holder may be included in a Distribution List.

Creating a Distribution List for an Order Set in the Content Manager

Users with appropriate permission can create a distribution list. To create a distribution list, complete the following steps:

1. In **Content Explorer**, select an order set and then click the **Manage** link to open the **Content Manager** screen.

2. If a user does not have correct permission, the Manage link will be unavailable. Click the **Manage Reviewers** link at the top of the screen. The **Manage Reviewers** main screen opens and displays an address book of reviewers, authors, teams, and distribution lists for the client environment.

3. Click the **New Distribution List** button at the top of the screen. The **New Distribution List** screen appears. Complete the requested data and click **Save**.

   o **List Name**: Provide a name for the distribution list.
   o **Create Date**: This date is automatically populated with the current date.
   o **Last Modified Date**: This date is automatically populated with the date on which the distribution list was modified.

The screen shows two list boxes labeled Address Book and Distribution List.

- o The **Address Book** lists the available authors and reviewers for the environment who may be added to a distribution list.
- o The **Distribution List** shows the authors and reviewers who make up the distribution list.

4. To add authors, reviewers, or distribution lists to the Distribution List, select the appropriate check box in the Address Book list box and click the > link.
5. To remove authors, reviewers, or distribution lists from the Distribution List, select the appropriate check box in the **Distribution List** box and click the < link. The names are moved back to the Address Book.

- o To **add** all authors, reviewers, and distribution lists from the Address Book to the Distribution List, click the >> link.
- o To **remove** all authors, reviewers, and distribution lists from the Distribution List, click the << link.

Editing a Distribution List for an Order Set in the Content Manager
Users with appropriate permission can edit a distribution list. To edit an existing distribution list, complete the following steps:

1. In **Content Explorer**, select an order set and then click the **Manage** link to open the **Content Manager** screen.
2. If a user does not have correct permission, the **Manage** link will be unavailable. Click the **Manage Reviewers** link at the top of the screen. The **Manage Reviewers** main screen opens and displays an address book of reviewers, authors, teams, and distribution lists for the client environment. Mouse over a team or distribution list to display a tooltip showing a list of the members whose names and e-mail addresses are missing.

3. Double-click a distribution list from the address book or single-click a distribution list and click the **Edit** button at the top of the screen. The **Edit Distribution List** screen opens.
4. Edit the list and click **Save**. You may revise the list name or add or remove names from the Distribution List.
5. To add authors, reviewers, or distribution lists to the Distribution list, select the appropriate check box in the Address Book list box and click the > link.
6. To remove authors, reviewers, or distribution lists from the Distribution List, select the appropriate check box in the Distribution List and click the < link. The names are moved back to the Address Book.

   o To **add** all authors, reviewers, and distribution lists from the Address Book to the Distribution List, click the >> button.
   o To **remove** all authors, reviewers, and distribution lists from the Distribution List, click the << button.

Deleting a Reviewer or Distribution List for an Order Set in the Content Manager
Users with appropriate permission can delete Reviewers or Distribution lists. To delete a Reviewer or Distribution List, complete the following steps:

1. In the content list, select an order set and then click the **Manage** link to open the **Content Manager** screen.
2. If a user does not have correct permission, the Manage link will be unavailable. Click the **Manage Reviewers** link at the top of the screen. The **Manage Reviewers** main screen opens and displays an address book of reviewers, authors, teams, and distribution lists for the client environment.
3. Select a Reviewer/Distribution List from the list and click the **Delete** link at the top of the screen. When prompted, click **OK** to confirm the deletion.

Changing the Status of an Order Set
Users with appropriate permission can change the status of an order set in the Content Manager by clicking the appropriate link at the top of the Content Manager. The link that is available depends on the status assigned to the order set. The following table shows valid status changes:

Order Sets in this Status…	Can be changed to this status…
Draft	Released or Review
Review	Released or Draft
Released	Retired
Retired	You can create a Draft version of the Retired order set by duplicating it

Marking the Order Set as Linkable Content

Select the **Mark as Linkable Content** check box at the top of the Content Manager to lag the order set as a linkable order set. Once an order set is flagged as a linkable order set, it is available to be added to an order set. **Only released order sets can be marked as linkable content**. See Adding Linkable Content to an Order Set.

Reviewing Order Sets

To review an order set, select any order set with a Review status from the content list, and click the **Review** link to open the Content Reviewer. You can add, edit, review, and print review comments associated with order sets. This section consists of the following information:

- Adding a Review Comment to an Order Set in AuthorSpace
- Editing/Hiding a Review Comment for an Order Set in AuthorSpace
- Printing Review Comments for an Order Set in AuthorSpace
- Viewing Review Comments for an Order Set in AuthorSpace
- Searching an Order Set in the Content Reviewer

Adding a Review Comment to an Order Set in AuthorSpace

A comment refers to any feedback or questions posted to a reviewable order set. A comment may relate to the entire order set or to a single order item within the order set. A comment may have responses added to it by the order set author or reviewers. AuthorSpace users initiating the review may also use the comments functionality to post questions to their reviewers.

Linkable and virtual linkable content inserted into an order set appear collapsed in Review mode. Click **View Linked Content** to expand the content in a separate **Content Viewer** window. Users will have the ability to comment on the linkable or virtual linkable but not on individual items within the linkable. Comments on individual items within the linkable content can be made at the time the linkable content is reviewed.

To add a comment, complete the following steps:

1. In the content list, select an order set with a Review status and click the **Review** link. Use the scroll bars in each pane to view all the information. Click the gray divider line between the panes and drag the line either up or down to resize any of the panes.
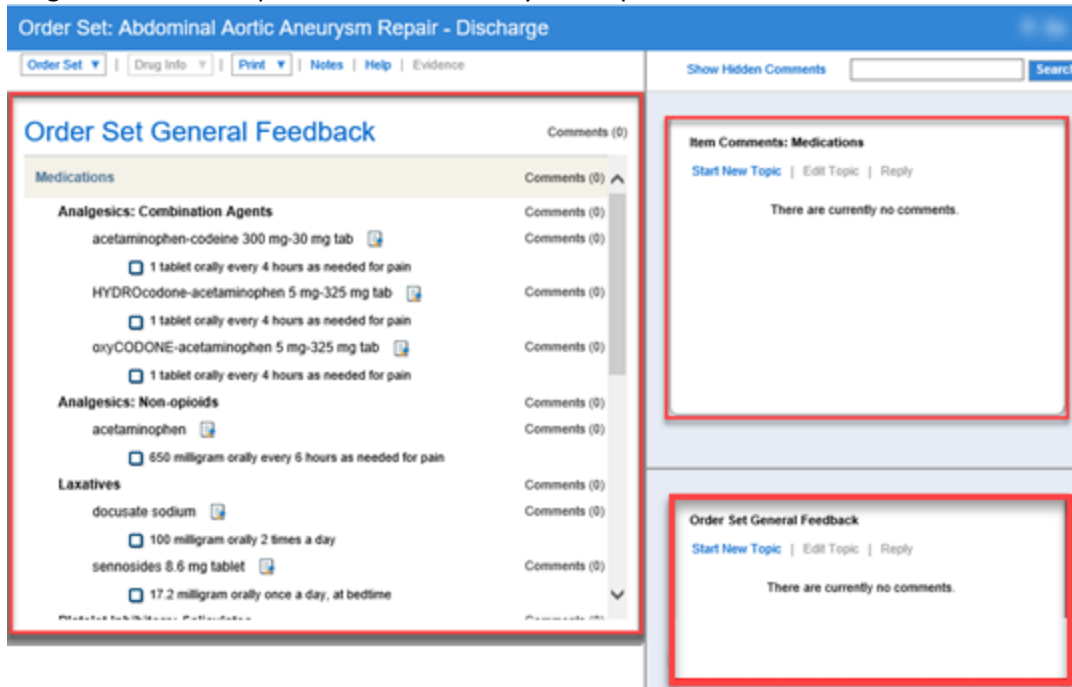
When you click on linkable content or virtual linkable content to comment on it, the top feedback pane refers to Virtual Linkable Comments or Linkable Comments.

2. To post a comment about a single order item, select the order item in the left-hand pane. Click the **Start New Topic** link to open the **New Comment** dialog box. The dialog box identifies the order set and order item that the comment relates to. To post a general comment that applies to the entire order set, click the **Start New Topic** button in the General Feedback pane to open the **New Comment** dialog box.
3. Complete the fields in the **New Comment** dialog box and click **Save**.

   o Enter your comment in the **Comment** box. This is a free text field.
   o (Optional) Select the rating scale for your reviewer to use. You can choose a rating scale that is appropriate for the nature of your review. For example, you can choose a scale that allows the reviewer to rate an order from 1-5, or to specify whether he agrees, disagrees, or has no opinion. Only the author who owns the content can post a new comment with a rating scale.

- Set the status to either Active or Hidden, depending on whether you want your comment displayed.

4. Click the **x** in the upper right-hand corner to close the Content Reviewer.

You can edit/hide a comment. See Editing/Hiding a Review Comment for an Order Set in AuthorSpace.

Editing/Hiding a Review Comment for an Order Set in AuthorSpace

Posted comments may be edited by any user with edit rights to the order set. A reply to a comment may not be edited after it has been posted. Once a reply has been posted, a comment can be hidden but cannot be edited in any other way. When the user hides the comment, the system sets the status to hidden and no longer displays the comment in ViewSpace. To edit or hide a comment, complete the following steps:

1. In the content list, select an order set with a Review status and then click the **Review** link.
2. Select the desired comment in either the Item Comments pane or the General Feedback pane.
3. Click the **Edit Topic** link to open the **Edit Comment** dialog box.
4. Complete the fields as appropriate and click the Save button. If the comment has replies, only the status field may be edited. If the status was set to hidden and **Hide Hidden Comments** is selected, the comment and responses are removed from the Content Reviewer.

Printing Review Comments for an Order Set in AuthorSpace

You may print review comments and later use the printed comments to edit the order set in AuthorSpace. Comments are printed in the order they appear on-screen. To print comments, complete the following steps:

1. In the content list, select an order set with a Review status and then click the **Review** link to open the Content Reviewer.
2. Select **Print > Print Comments** from the menu at the top. The **Print Comments** dialog box opens.
3. Select **Print General Comments**, **Print Item Comments**, or **Export to Excel**.
4. Click **Print**. General comments and order item comments are printed in separate html tables with the following columns:

   - Status Date
   - Status
   - Reviewer Last Name
   - Reviewer First Name

o   Comment Text
o   Rating

Comments in linkable order sets will appear when an order set containing that linkable is printed.

Viewing Review Comments for an Order Set in AuthorSpace
You can see review comments for an order set. All new thread comments appear in chronological order, with the newest comments at the top. Replies to comments will be below the comment that is replied to. To view review comments for an order set, complete the following steps:

1. In the content list, select an order set with a Review status and then click the **Review** link.
2. Click the **Show Hidden Comments** link to display the hidden comments with a gray background. The **Show Hidden Comments** link is changed to **Hide Hidden Comments**.

You can also view **General Review Comments** in the Order Set Reviews section in the Content Manager.

Searching an Order Set in the Content Reviewer
The author or reviewer can perform a Find-in-Page text search within a single order set in the Content Reviewer. The Find-in-Page text search searches the content as well as the review comments. Open the order set in the Content Reviewer and then complete the following step:

1. Enter search text in the text input box at the top right of the **Content Reviewer** screen and click **Search**. Results are highlighted as such:

    o   Search results appear highlighted; the pane automatically scrolls to the first instance of the search result.
    o   If the text is found in the review comments for a content item, the Comments link is highlighted.

Using Advanced Search in the Content Reviewer
Open the order set in the Content Reviewer and then complete the following steps:

1. Select **Order Set > Advanced Search** to open the **Find** dialog box.
2. Complete the dialog box to define your search, and then click the **Find** button:

    o   **Find What box**: Specify the search text in the **Find What** input box.
    o   **Find On Content Object** check box: When selected, content will be searched. This is selected by default.
    o   **Find On Reviews & Feedback** check box: When selected, the review comments will be searched. This is selected by default.
    o   **Match Case** check box: When selected, only results that match the case of the search term will be found. This option is not selected by default.
    o   **Match Whole Word** check box: When selected, results that match the whole search term will be found. This option is not selected by default.

    The search results appear highlighted as such:

    o   The pane automatically scrolls to the first instance of the search result.

    o   If the text is found in the review comments for a content item, the **Comments** link is

highlighted.

Customizing and Editing Order Sets

To customize and edit order sets for your hospital or health system, select an order set from the content list and click the **Edit** link to open the order set in the Content Editor.

Order Sets are assigned version numbers once they are released. A released or retired order set cannot be edited without changing the version number. If you choose a released or retired order set for editing, you will be prompted to create a draft version of the order set, and a new version number will be assigned when that draft is released. See Versioning Order Sets for additional information.

To see a list of shortcut keys for the Content Editor, see Using Shortcut Keys.

This section provides information on performing the following tasks within the Content Editor:

- Navigating the Content Editor
- Moving Items Within an Order Set
- Copying and Pasting Items Within an Order Set
- Cloning Details
- Inserting an Order Set
- Adding Linkable Content to an Order Set
- Adding a Section to an Order Set
- Adding a Bundle to an Order Set
- Adding an Orderable to an Order Set
- Adding a Reminder Item to an Order Set
- Adding a Medication Detail to an Order Set
- Deleting Items from an Order Set
- Modifying Items in an Order Set
- Adding or Editing Performance Measures
- Adding Notes and Build Notes to an Order Set
- Editing Notes and Build Notes
- Viewing Notes and Build Notes in an Order Set
- Deleting Notes and Build Notes from an Order Set
- Adding Tasks to an Order Set
- Viewing Tasks for an Order Set
- Completing Tasks for an Order Set
- Deleting Tasks from an Order Set
- Editing Tasks in an Order Set
- Printing Order Sets

Navigating the Content Editor

From the content list, select the content of interest and click the Edit link to open the Content Editor, shown below:
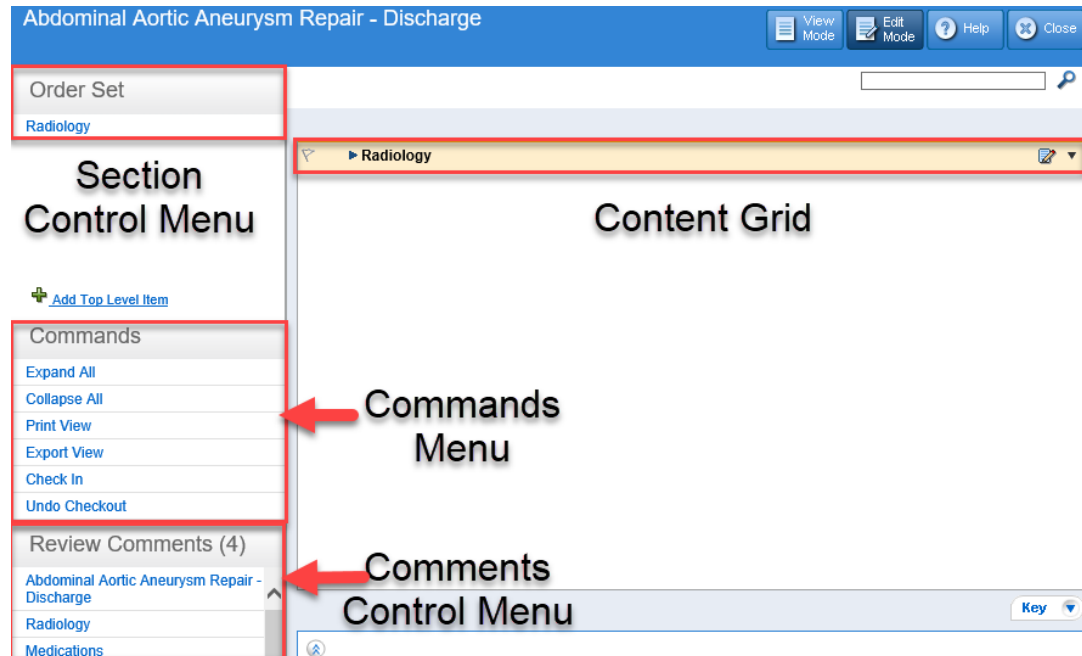
The left pane of the Content Editor displays the following menus:

- **Section Control Menu**: Includes top-level sections of the content. Click any section to bring it into focus in the content grid. You can also delete any of the sections from this menu.
- **Commands Menu**: Displays commands for interacting with the content in the content grid. The **Commands Menu** changes depending on whether you are in View Mode (Content Viewer) or Edit Mode (Content Editor). In general, the commands presented in this menu apply to the content. Instructions for accessing commands from this menu will be written as, for example, "Click **Print View** on the **Commands Menu**."
- **Comments Control Menu**: Shows review comments from ViewSpace. This menu is always available in the Content Editor. By default, this menu is not displayed in the Content Viewer. If you wish to display review comments in the Content Viewer, contact Zynx Health. Click any item in the **Comments Control Menu** to bring the item into focus in the content grid, edit the workspace, and open the comment(s) in a separate window.
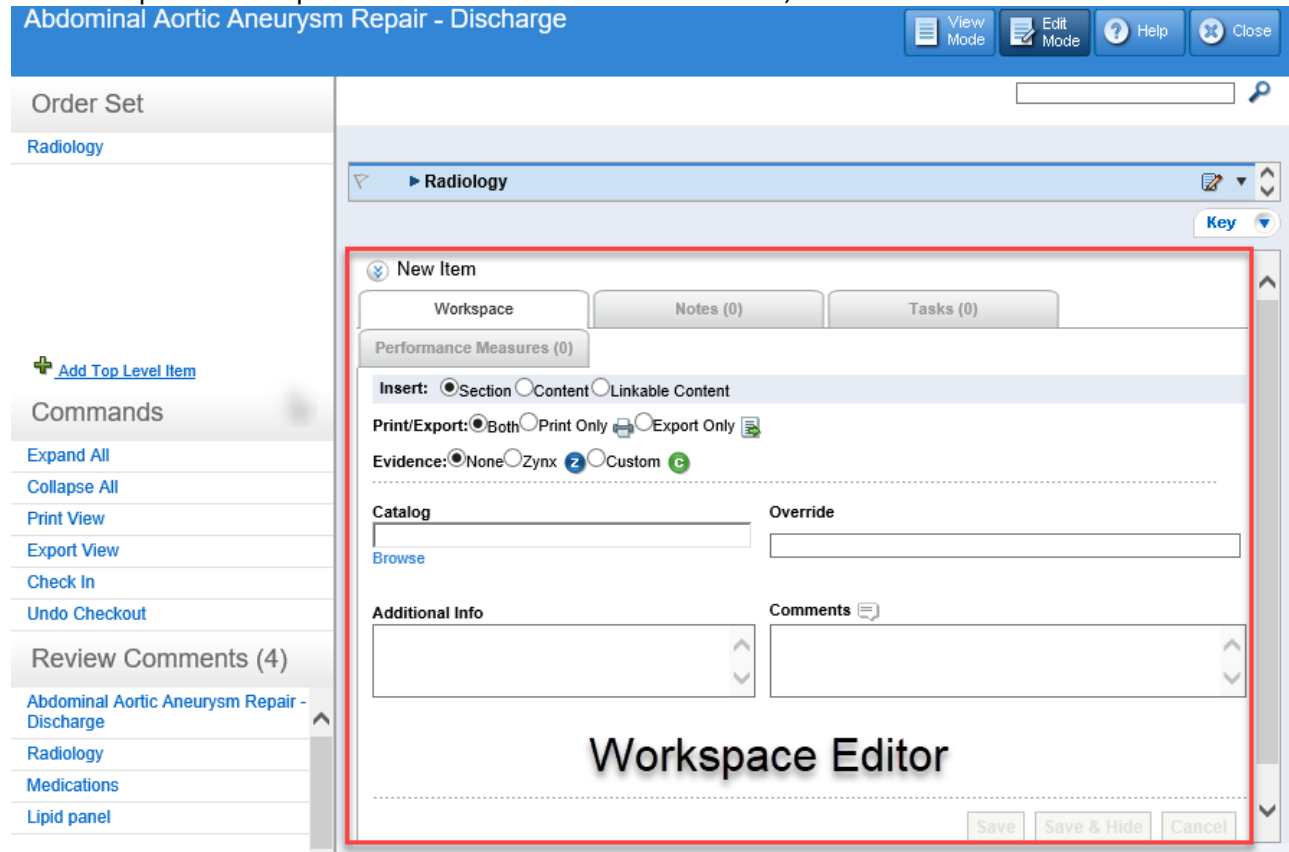
The right pane of the Content Editor displays the content (order set or plan of care) in a content grid. It shows order items for individual Sections, such as Vital Signs, Activity, Nursing Orders, etc. The view is collapsed by default. To expand or collapse the view, do any of the following:

- To fully expand the content and view all available order items, click **Expand All** on the **Commands Menu** on the left side of the screen. To return to the collapsed view, click **Collapse All** on the **Commands Menu**.
- To expand an individual Section (for example, Medications), double-click or press the right arrow key anywhere on the line or click the ▶ icon next to the desired Section. To collapse an individual Section, double-click or press the left arrow key anywhere on the line, or click the   icon.

The following icons appear next to each line item in the content grid and can be used to open the Workspace Editor:

- The **Edit button** ( ): This button is available for each line item in the content grid. Click the **Edit** button to open the Workspace Editor.
- **Down-arrow button** ( ): Click the arrow to the right of the **Edit** button to access a menu of commands to insert, delete, cut, or copy content, or to edit the selected item's workspace. The available menu options are dependent on the item type. Instructions for accessing these menu commands will be written as, for example, "Click the arrow to the right of the **Edit** button and select **Insert**." Select **Insert** or **Edit** to open the Workspace Editor.

The Workspace Editor opens at the bottom of the Content Editor, as shown below.

With the Workspace Editor opened, you can continue to scroll through the content grid. If you make a change in the Workspace Editor without saving it and then try to open another Workspace Editor, you will be prompted to save your changes. The Workspace Editor displays a Workspace, Notes, Tasks, and **Performance Measures** tabs, depending on the item. When inserting a new item, these tabs appear grayed out and are unavailable until edits to the Workspace tab are saved because the display depends on the item type.

- In the content grid, inactive custom catalog terms and Zynx Health catalog terms appear in red with a dashed underline. In the Workspace Editor, inactive catalog terms appear in red in a dropdown list.

To maximize/minimize the Workspace Editor at any time, click the **or** **icons in the upper left**

of the Workspace Editor. See **Content Viewer/Editor Icons** for an explanation of the icons that appear in the Content Editor.

Using Shortcut Keys

Use the following shortcut keys to navigate the Content Editor. A list of these shortcuts is also available by clicking the **Key** button (Key ▼) at the bottom of the content grid. Select an item and then use the shortcut keys to perform any of these functions:

Shortcut Commands	Action Performed
CTRL+ C	Copy item
CTRL + V	Paste item
CTRL+ D	Delete item
CTRL+ I	Insert item/Clone
CTRL+ E	Edit item
Down	Move to the next visible item
Up	Move to previous visible item
Left	Collapse item
Right	Expand item
CTRL + F3	Navigate to next search item

Order Sets in this Status…	Can be changed to this status…
Draft	Released or Review
Review	Released or Draft
Released	Retired
Retired	You can create a Draft version of the Retired order set by duplicating it

Moving Items Within an Order Set

You can move items or Sections within an order set using a drag and drop operation. Follow these guidelines when moving items or Sections within an order set:

- ▪ To move an item or Section to a new location, drop the item or Section immediately above the desired position.

- To move a Section below a Section header so that it appears as a subsection within that Section, hold the shift key while dragging the item to a Section header, release the mouse button, and then release the shift key.

Copying and Pasting Items Within an Order Set

You can copy and paste sections or subsections, order items, drug order details, order item details, or bundles within an order set in the Content Editor, or you can copy items from an order set in the Viewer and then paste them into an order set in the Editor. To copy and paste within the Editor, complete the following steps:

- For the item you wish to copy, click the arrow to the right of the **Edit** button and then click **Copy**, or select the item and press CTRL+C. If your selection has children associated with it, a dialog box appears, asking whether you wish to copy the children as well.
- Click the arrow to the right of the **Edit** button in the row below which you want to paste the copied item and click Paste or select the item below which you want to paste the copied item and press CTRL+V.

To copy items from the Viewer and then paste them into an order set in the Editor, complete the following steps.

1. In the Viewer, select the item you wish to copy and click **Copy** from the **Commands Menu**. If the item has children, a dialog box appears, asking if you wish to copy the children.
2. Open the other order set in the Editor, navigate to the appropriate location, and click the arrow to the right of the **Edit** button and select **Paste** or press CTRL+V. The copied item will be pasted below the item selected.

Inserting an Order Set

You can insert the content of a released order set inside another order set. The inserted content can only be modified within the order set into which it was inserted. When the original order set (i.e., the source order set) is updated, the changes will not be reflected in any of the order sets where the original was inserted. Only released order sets are available to be inserted. To insert an order set, complete the following steps:

1. To insert the order set at the highest level, select **Add Top Level Item**. To insert the order set beneath a section, click the arrow to the right of the **Edit** button and select **Insert** or press CTRL+I.
2. Select **Content** in the Workspace Editor.
3. Click **Browse** to open the **Insert Order Set** dialog box. A tree-view of the order set folders appears on the left side of the dialog box. Click ⊞ to expand a folder; click ⊟ to collapse a folder. Click a folder to view its released order sets on the right side of the dialog box.
4. Navigate to the appropriate order set, select it, and click the OK button
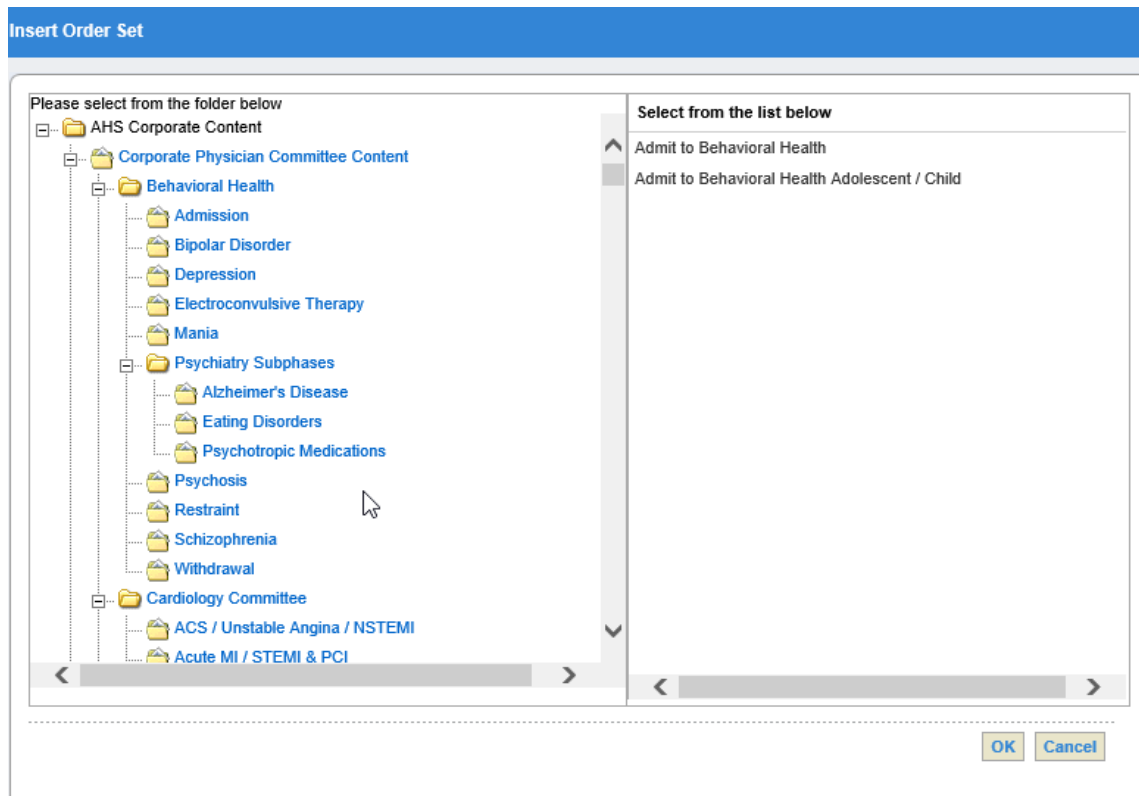
5. Click the **Save** button. (To minimize the Workspace Editor, click the **Save & Hide** button.)

Adding Linkable Content to an Order Set
Linkable content is any released content (order set or plan of care) that has been marked as linkable content in the Manager. (See Marking the Order Set as Linkable Content and Marking the Plan of Care as Linkable Content.)

Linkable content can be added to an order set. Although it cannot be modified within the order set, when the original linkable content is updated, the updates will appear in all the order sets in which the linkable content is housed.

When printed or exported: Linkable content will be fully expanded when printed or exported. All linkable content items will be displayed within the order set. If you insert linkable content as virtual linkable content, just the name or display name of the linkable content appears (as a placeholder) when the order set is printed or exported, instead of displaying the linkable content in its entirety.

▪ If you plan to export your order sets to an EMR system, please check your integration manual for instructions on whether your system can handle linkable or virtual linkable content.

In View and Review mode: Linkable content will appear collapsed with an identifying icon (🔗 for linkable content, and 🔗 for virtual linkable content). Click on the linkable item to open the full linkable content in View mode in another window. To add linkable content, complete the following steps:

1. To insert linkable or virtual linkable content in the Content Editor at the same level as top-level sections, select **Add Top Level Item**. Inserting the content in this manner will add the linkable content to the bottom of the order set by default. You can then drag and drop it to the desired location. To insert linkable content or virtual linkable content within a Section, click the arrow to

the right of the **Edit** button and select **Insert** or press CTRL+I. Select **Linkable Content** from the Workspace Editor to display additional options.

2. Click the **Browse** link to the right of the **Map** field. This action opens the **Insert Linkable Order Set** window so that you can search for linkable content to add. A tree-view structure appears on the left side. Click ⊞ to expand a folder; click ⊟ to collapse a folder. Click a folder to view its contents on the right side. Only linkable or virtual linkable content will be presented.

3. Navigate to the appropriate linkable order set, select it, and click the **OK** button to return to the Workspace Editor.

4. Configure the workspace as necessary:

   o Select the **Virtual Linkable** check box if you wish to display this linkable content as virtual linkable content.
   o (optional) Type a name in the **Display** field for the linkable content. This is the name for the linkable content that will be displayed in the order set. If there is a display name and a linkable content name, only the display name will be used.
   o Click the **View** link to display the expanded linkable order set in the Viewer.
   o Click the **Clear** link to search for different linkable content.

5. Click the **Save** button to submit the change.

Managing Linkable Items in an Order Set

When you release a new version of a linkable item (virtual or nonvirtual), any content in Draft or Review status containing the linkable is automatically updated. However, the linkable will not be updated if it appears in Released content. When you attempt to release linkable content that is contained within a Released order set, the **Linked Content** dialog box appears (shown below), with options for updating the Released content.

The **Linked Content** dialog box lists the Released content by type and indicates whether a new version of the content exists in Draft/Review status. Use this information to determine how to proceed.

- If a new version of the content does not exist in Draft/Review status, select the **Automatically Apply Change** option or the **Apply and Edit Change** option from the dialog box. You can either leave the new content in Draft status or release it immediately, depending on where that content is in your review/approval process.
- If a newer version of the content exists in Draft/Review status, select the **Disregard Change** option from the dialog box. Any content in Draft/Review status will automatically be updated when you release the new linkable content.
- If you find that you need to do further research prior to making your selections and releasing the linkable, click on the **Run Report** button to generate an Excel spreadsheet populated with the information from the dialog box.

To make your selections, click the radio button in the desired column for the appropriate content. If you click **Select all below**, all radio buttons in that column will be selected.

If you click the **Cancel** button or close the dialog box by clicking the **x** in the upper right-hand corner of the dialog box, the dialog box will close, and the linkable content will not be released.

Adding a Section to an Order Set

A Section is a grouping used to organize items in an order set. A Section may appear as the highest level in the order set hierarchy, or within another Section. To add a new section, complete the following steps:

1. To add a Section at the highest level within an order set, select **Add Top Level Item**. This method adds a new Section at the bottom of the order set by default. You can then drag the Section to the desired location at any time. To add a Section within another Section, click the arrow to the right of the **Edit** button and select **Insert** or press CTRL+I.
2. Select **Section** from the Workspace Editor.
3. From the **Print/Export** options, you may select **Print Only** or **Export Only** (the default is **Both**). In Print View, items marked as Export Only will not be displayed. In Export View, items marked as Print Only will not be displayed.

4. From the **Evidence** options, you may select one of the following options:

   o **None**: This is the default setting.
   o **Zynx**: If you select this option, the **Choose Evidence** dialog box will open, allowing you to construct the path for the evidence by selecting, in order, the product, module, and evidence you want to link to.
   o **Custom**: If you select Custom, type the URL in the box.

5. Populate one of the following fields to name the Section:

   o **Catalog**: Click the **Browse** button to open the AuthorSpace Catalog to search the Custom catalog, Zynx catalog, or the Zynx + Custom catalog. The term you select from the catalog will populate the **Catalog field**. This is the name of the Section that will appear in the order set.
   o To clear the **Catalog** field, click the **Clear** link.

- o **Override**: If you wish to change the name of the section to something other than what appears in the **Catalog** field (without changing meaning), type free text in the **Override** text box. This is the name that will be reflected in the order set.

  Text in the **Override** field is free text and is not recommended for order set integration. In general, you should always refer to your integration manual for instructions on how to optimally build for integration.

6. The **Additional Info** field is free text; type the detail that will be appended to the name (catalog term or override) in the displayed order set.
7. Optional: The **Comment** text box can be used to add free text comments. If an item has comments, the ⬚ icon will appear next to the item in the Viewer and Editor. Users can hover over the icon to display the comments.
8. Click the **Save** button. (To minimize the Workspace Editor, click the **Save & Hide** button.)

To add a performance measure to the Section, select the **Performance Measures** tab from the Workspace Editor to view a list of available performance measures. Select the desired performance measure(s) from the list and then click the **Save** or **Save & Hide** button to close the window.
Click the **Reset** button at any time to clear any selected items.

- o The **Performance Measures** icon (🏅) will appear next to the Section in the order set.

Adding a Bundle to an Order Set
A Bundle is a group of order items that are usually ordered or administered together. There are two types of bundles: group and selection. A group Bundle is a group of items that must be ordered together, while a selection Bundle is a Bundle in which one or more of the items in the group are optional.

Bundles are not recommended for order set integration. In general, you should always refer to your integration manual for instructions on how to optimally build for integration.

To add bundles, complete the following steps:

1. From a Section or subsection, click the arrow to the right of the **Edit** button and select **Insert** to open the Workspace Editor (or select the Section or subsection of interest and press CTRL+I).
2. From the Insert options, select **Bundle**.
3. From the **Pre-Select** options, select any of the following options:

   - o **Optional**: If you select this option, the item will not be preselected in the customized order set. Its check box will be unchecked. The item can be manually selected in the order set.
   - o **Default**: If you select this option, the item will be preselected in the customized order set. Its check box will appear with a check mark in it.
   - o **Required**: If you select this option, the item will appear as a required item in the customized order set.

4. From the **Evidence** options, select one of the following options:

   - o **None**: This is the default setting.
   - o **Zynx**: If you select this option, the **Choose Evidence** dialog box will open, allowing you to

construct the path for the evidence by selecting, in order, the product, module, and evidence you want to link to.
   o **Custom**: If you select Custom, type the URL in the box.

5. From the **Print/Export** options, you may select **Print Only** or **Export Only** (the default is **Both**). In Print View, items marked as Export Only will not be displayed. In Export View, items marked as Print Only will not be displayed.
6. In the **Bundle Name** field, type the name of the Bundle.
7. Choose either Group Bundle or Selection Bundle from the **Bundle Type** drop-down list. For group Bundles, the Bundle name appears in the Content Editor with a check box, indicating that all the items in the Bundle are ordered together. For selection Bundles, each item within the bundle appears in the Content Editor with its own check box because each item can be ordered separately.
8. In the **Additional Info** box, add free text to provide details about the Bundle.
9. Optional: The **Comment** text box can be used to add free text comments. If an item has comments, the ▤ icon will appear next to the item in the Viewer and Editor. Users can hover over the icon to display the comments. Keep in mind that comments may appear on the paper order set, depending on the format.
10. Click the **Save** button. (To minimize the Workspace Editor, click the **Save & Hide** button.)

You can add Orderable, Medication, or Reminder items to a Bundle. See Adding an Orderable to an Order Set; Adding a Reminder Item to an Order Set; or Adding a Medication a Medication Detail to an Order Set.

A Bundle is designated by either a right-pointing arrow ▶ or a downward pointing arrow ▶ to the right of the item. These arrows indicate whether the Bundle is collapsed or expanded. (You can also double-click to collapse or expand the Bundle.)

Adding an Orderable to an Order Set
To add an orderable, complete the following steps:

1. From a Section, subsection, or Bundle in the Content Editor, click the arrow to the right of the **Edit** button and select **Insert** or press CTRL+I. In the Workspace Editor, select **Non-med order or Med order** from the Insert options.
2. From the Pre-Select options, select one of the following:

   o **Optional**: If you select this option, the item will not be preselected in the customized order set. Its check box will be unchecked. The item can be manually selected in the order set.
   o **Default**: If you select this option, the item will be preselected in the customized order set. Its check box will appear with a check mark in it.
   o **Required**: If you select this option, the item will appear as a required item in the customized order set.

3. From the **Evidence** options, select one of the following:

   o **None**: This is the default setting.
   o **Zynx**: If you select this option, the **Choose Evidence** dialog box will open, allowing you to construct the path for the evidence by selecting, in order, the product, module, and evidence you want to link to.
   o **Custom**: If you select Custom, type the URL in the box.

4. From the **Print/Export** options, you may select **Print Only** or **Export Only** (the default is **Both**). In Print View, items marked as Export Only will not be displayed. In Export View, items marked as Print Only will not be displayed.

5. Populate one of the following fields to name the Orderable:

   o **Catalog**: Click the **Browse** button to open the AuthorSpace Catalog to search the Custom catalog, Zynx catalog, or the Zynx + Custom catalog. The term you select from the catalog will populate the **Catalog** field. This is the name of the Orderable that will appear in the order set.
   o To clear the **Catalog** field, click the **Clear** link.
   o **Override**: If you wish to change the name of the section to something other than what appears in the **Catalog** field (without changing meaning), type free text in the **Override** text box. This is the name that will be reflected in the order set.

Text in the **Override** field is free text and is not recommended for order set integration. In general, you should always refer to your integration manual for instructions on how to optimally build for integration.

6. The **Additional Info** field is free text; type the detail that will be appended to the name (catalog term or override) in the displayed order set.
7. Optional: The **Comment** text box can be used to add free text comments. If an item has comments, the ☰ icon will appear next to the item in the Viewer and Editor. Users can hover over the icon to display the comments.
8. Click the **Save** button. (To minimize the Workspace Editor, click the **Save & Hide** button.)

To add a performance measure to the orderable, select the **Performance Measures** tab from the Workspace Editor to view a list of available performance measures. Select the desired performance measure(s) from the list and then click the **Save** or **Save & Hide** button to close the window.

Click the **Reset** button at any time to clear any selected items.

The **Performance Measures** icon (👥) will appear next to the orderable in the order set.

Searching the AuthorSpace Catalog

You can populate the **Catalog** field in a workspace with a term from the Zynx catalog, Custom catalog, or Zynx + Custom catalog. First, select **Add Top Level item** and select **Section**. The **Browse** link next to the **Catalog** field to open the AuthorSpace Catalog dialog. Complete the following steps to search for a term in the catalog:

1. From the **Catalog** drop-down, select whether you want to search the Zynx catalog, Custom catalog, or Zynx + Custom catalog.
2. From the **Term Type** drop-down, select the type.
3. Enter the text to search for in the **Term Name** field and click the **Search** button.

   o The system searches for each word/letter in the **Term Name** field.
   o If you do not specify a term type, type at least 2 characters in the **Term Name** field.
   o If you specify a term type without typing any characters in the **Term Name** field, clicking the **Search** button returns all items of that term type from the specified catalog.

4. Select the item you wish to use and click the **OK** button. The item you selected will populate the **Catalog** field in the workspace.

Adding a Reminder Item to an Order Set

To add a Reminder, complete the following steps:

1. From a Section, subsection, or Bundle in the Content Editor, click the arrow to the right of the **Edit** button and select Insert, or press CTRL+I. In the Workspace Editor, select **Reminder** from the Insert options.
2. From the **Print/Export** options, you may select **Print Only** or **Export Only** (the default is **Both**). In Print View, items marked as Export Only will not be displayed. In Export View, items marked as Print Only will not be displayed.
3. From the **Evidence** options, select one of the following:

   o **None**: This is the default setting.
   o **Zynx**: If you select this option, the **Choose Evidence** dialog box will open, allowing you to construct the path for the evidence by selecting, in order, the product, module, and evidence you want to link to.
   o **Custom**: If you select Custom, type the URL in the box.

4. The **Text** box is a free text field; type the Reminder text. The text will appear in the order set exactly as typed.
5. Optional: The Comment text box can be used to add free text comments. If an item has comments, the 🗩 will appear next to the item in the Viewer and Editor. Users can hover over the icon to display the comments.
6. Click the **Save** button. (To minimize the Workspace Editor, click the **Save & Hide** button.)

To add a performance measure to the reminder, select the **Performance Measures** tab from the Workspace Editor to view a list of available performance measures. Select the desired performance measure(s) from the list and then click the **Save** or **Save & Hide** button to close the window.
Click the **Reset** button at any time to clear any selected items.

   o The **Performance Measures** icon (🏅) will appear next to the Reminder in the order set.

Adding a Medication Detail to an Order Set
To add a Medication, complete the following steps:

1. From the Medications section in the Content Editor, click the arrow to the right of the **Edit** button and select Insert, or press CTRL+I. In the Workspace Editor, select **Med Order** from the Insert options.
2. From the Pre-Select options, select one of the following:

   o **Optional**: If you select this option, the item will not be preselected in the customized order set. Its check box will be unchecked. The item can be manually selected in the order set.
   o **Default**: If you select this option, the item will be preselected in the customized order set. Its check box will appear with a check mark in it.
   o **Required**: If you select this option, the item will appear as a required item in the customized order set.

3. From the **Evidence** options, select one of the following:

   o **None**: This is the default setting.
   o **Zynx**: If you select this option, the **Choose Evidence** dialog box will open, allowing you to construct the path for the evidence by selecting, in order, the product, module, and evidence

you want to link to.
- o **Custom**: If you select Custom, type the URL in the box.

4. From the **Print/Export** options, you may select **Print Only** or **Export Only** (the default is **Both**). In Print View, items marked as Export Only will not be displayed. In Export View, items marked as Print Only will not be displayed.

5. Populate one of the following fields to name the Orderable:

- o **Catalog**: Click the **Browse** button to open the AuthorSpace Catalog to search the Custom catalog, Zynx catalog, or the Zynx + Custom catalog. The term you select from the catalog will populate the **Catalog** field. This is the name of the Orderable that will appear in the order set.
- o To clear the **Catalog** field, click the **Clear** link.
- o **Override**: If you wish to change the name of the section to something other than what appears in the **Catalog** field (without changing meaning), type free text in the **Override** text box. This is the name that will be reflected in the order set.

Text in the **Override** field is free text and is not recommended for order set integration. In general, you should always refer to your integration manual for instructions on how to optimally build for integration.

6. The **Additional Info** field is free text; type the detail that will be appended to the name (catalog term or override) in the displayed order set.
7. Optional: The **Comments** text box can be used to add free text comments. If an item has comments, the   icon will appear next to the item in the Viewer and Editor. Users can hover over the icon to display the comments.
8. Click the **Save** button. (To minimize the Workspace Editor, click the **Save & Hide** button.)

To add a performance measure to the Medication, select the **Performance Measures** tab from the Workspace Editor to view a list of available performance measures. Select the desired performance measure(s) from the list and then click the **Save** or **Save & Hide** button to close the window.
Click the **Reset** button at any time to clear any selected items.

The **Performance Measures** icon (🎖️) will appear next to the Medication in the order set.

Deleting Items from an Order Set
To remove sections or subsections, order items, details, or bundles from an order set, complete the following steps:

1. In the Content Editor, click the arrow to the right of the **Edit** button and select **Delete** for the item you wish to delete, or select the item of interest and press CTRL+D.
2. To restore the deleted item, click **Undo Delete** from the **Commands Menu**.

Sections and subsections have parent/child relationships. If you select a Section or subsection to delete, that entire Section, including children contained within it, will be deleted. If you select a Non-med order or Med order, the order details will be deleted as well.

You can also delete Sections from the **Section Control Menu**. Hover over the Section you wish to delete and then click (❌).

You can flag items for deletion without removing them from view right away. Click the **Flag** icon (🚩) to flag an item and any of its children. When you are ready to delete flagged items, select the **Delete Flagged**

button at the bottom of the content grid.

To unflag an item, click the previously selected **Flag** icon ( ) next to the item. Unflag all flagged items by clicking on the **Unflag All** button at the bottom of the content grid.

Modifying Items in an Order Set
To modify order items or Sections, complete the following steps:

1. For the item or Section, either click the **Edit** button or click the arrow to the right of the **Edit** button and select **Edit**. The appropriate workspace will open with the current information already filled in.
2. Click in any field to modify it.
3. Click the **Save** button. (To minimize the Workspace Editor, click the **Save & Hide** button.)

See Adding a Section to an Order Set, Adding a Bundle to an Order Set, Adding an Orderable to an Order Set, Adding a Reminder Item to an Order Set, and Adding a Medication Detail to an Order Set for information on each type of workspace.

Adding or Editing Performance Measures
You can add performance measures to a Section or orderable, or you can edit currently existing performance measures. To add or edit performance measures, select a Section or orderable and complete the following steps:

1. For the item or Section, either click the **Edit** button or click the arrow to the right of the **Edit** button and select **Edit**. Then select the **Performance Measures** tab from the Workspace Editor to view a list of available performance measures.
2. Select the desired performance measure(s) from the list.
3. Click the **Save** button. (To minimize the Workspace Editor, click the **Save & Hide** button.)

The **Performance Measures** icon ( ) will appear next to the item in the Editor.

Adding Notes and Build Notes to an Order Set
You can add Notes or Build Notes to items (but not to details) within an order set. Build Notes are for internal use and pertain to the integration of the order set into your hospital's information system. To add Notes or Build Notes to an item, complete the following steps:

1. For an item, click the **Edit** button, click the arrow to the right of the **Edit** button and select **Edit**, or press CTRL+E to open the Workspace Editor.
2. Select the **Notes** tab in the Workspace Editor.
3. Click the **New** button.
4. Select **Note** or **Build Note** from the **Type** options.
5. Type the Note in the **Note** box (note editor).
6. Click the **Save** link. (To minimize the Workspace Editor, click the **Save & Hide** link.)

The icon will appear next to the item to indicate that a Note is available for display.

Notes can be deleted and edited. When you export content, you can choose to display the Build Notes in the export files. See Exporting Order Sets.

Editing Notes and Build Notes
To edit existing Notes or Build Notes for an order item or Section, complete the following steps:

1. For an item or Section, click the **Edit** button or click the arrow to the right of the **Edit** button and then select **Edit** to open the Workspace Editor.
2. Select the **Notes** tab in the Workspace Editor.
3. If the note is not displayed, select the appropriate type from the **Show** options.
4. Select the **Note** or **Build Note** and click the **Edit** button.
5. Edit the Note in the Note box (note editor).
6. Click the **Save** link. (To minimize the Workspace Editor, click the **Save & Hide** link.)

Viewing Notes and Build Notes in an Order Set

The 📒 icon appears next to items to indicate that a Note is available for display. In the Editor, open the Workspace Editor for the item, select the Notes tab, and then select the type of notes you wish to display (Notes, Build Notes, or All). In the Viewer, click the 📒 icon to display the information in a new window. By default, the **Notes** tab opens with all Notes and Build Notes displayed. To view only Notes, select the **Notes** option. Or to view only Build Notes, select the **Build Notes** option.

Deleting Notes and Build Notes from an Order Set

The 📒 icon appears next to items to indicate that a Note is available for display. To delete Notes or Build Notes from an item, complete the following steps:

1. For an item, click the **Edit** button, click the arrow to the right of the **Edit** button and select **Edit**, or press CTRL+E to open the Workspace Editor.
2. Select the Note to delete.
3. Click the **Delete** button. Click **Yes** to confirm when prompted.

Adding Tasks to an Order Set

You can add Tasks on items (but not item details) within an order set and assign them to other users to complete. To assign a task to a person, that person must have a valid e-mail address in AuthorSpace. To add Tasks to an item, complete the following steps:

1. For an item, click the **Edit** button, click the arrow to the right of the **Edit** button and select **Edit**, or press CTRL+E to open the Workspace Editor.
2. In the Workspace Editor, select the Tasks tab.
3. Click the **New** button.
4. Type the Task in the **Subject** box.
5. To assign the Task to the appropriate user, select a name from the **To** drop-down list at the bottom of the screen. You can assign multiple users to a task.
6. Click the **Save** link. (To minimize the Workspace Editor, click the **Save & Hide** link.)

The 📝 icon will appear next to the appropriate items, indicating that there are associated Tasks.

Viewing Tasks for an Order Set

When the 📝 icon appears next to items, it indicates that there are associated Tasks. To view Tasks for an item, complete the following steps:

1. For an item, click the **Edit** button, click the arrow to the right of the **Edit** button and select **Edit**, or press CTRL+E to open the Workspace Editor.
2. In the Workspace Editor, select the **Tasks** tab. Tasks appear on the left side of the tab.

Completing Tasks for an Order Set

When the icon appears next to items, it indicates that there are associated Tasks. To mark a Task as complete, perform the following steps:

1. For an item, click the **Edit** button, click the arrow to the right of the **Edit** button and select **Edit**, or press CTRL+E to open the Workspace Editor.
2. In the Workspace Editor, select the **Tasks** tab.
3. Select the task you would like to complete, click Edit, and change the Status in the drop-down list to **Complete**.
4. Click **Save**. The Task will be marked as complete.

Deleting Tasks from an Order Set

When the icon appears next to items, it indicates that there are associated Tasks. To delete a Task, perform the following steps:

1. For an item, click the **Edit** button, click the arrow to the right of the **Edit** button and select **Edit**, or press CTRL+E to open the Workspace Editor.
2. In the Workspace Editor, select the **Tasks** tab.
3. Select the Task to delete.
4. Click the **Delete** button.

Editing Tasks in an Order Set

When the icon appears next to items, it indicates that there are associated Tasks. To edit a Task, perform the following steps:

1. For an item, click the **Edit** button or press CTRL+E to open the Workspace Editor.
2. In the Workspace Editor, select the **Tasks** tab.
3. Select a Task and click the **Edit** button. Make the necessary edits and then click the **Save** link.

Printing Order Sets

To select a print format for an order set, complete the following steps:

1. To open the **Print** dialog box, do one of the following:

   o Select an order set from the content list and click the **Print** link.
   o In the Content Editor, click **Print View** from the **Commands Menu**. Then click **Print** from the **Commands Menu**.
   o In the Content Viewer, click **Print** from the **Commands Menu**.

2. Select the format for saving and printing your file and click the Go button. The following formats are available:

   o **Review Report V.1, Text**: Lists order set header information and all the reviews for the order set in a text file. Provides a way to see all the reviews for an order set without opening the Content Manager and scrolling through all the order set review notes. Can be opened in WordPad or Notepad.
   o **Standard HTML V.1, HTML**: Saves the order set as an HTML page that can be opened by a Web

browser. Order items have functional check boxes, so you can set default items by selecting or deselecting these check boxes. You can click Evidence links to access Evidence pages that open in a Web browser. You can also see which items have a performance measure associated with them. Item details are displayed on the same line as the order to which they apply.

- o **Standard HTML V.2, HTML**: Saves the order set as an HTML page that can be opened by a Web browser. Order items have nonfunctional grey check boxes. You can click Evidence links to access Evidence pages that open in a Web browser. You can also see which items have a performance measure associated with them. Item details are displayed on the same line as the order to which they apply

- o **Standard HTML V.3, HTML**: Saves the order set as an HTML page that can be opened by a Web browser. Order items have nonfunctional blue check boxes. You can click Evidence links to access Evidence pages that open in a Web browser. You can also see which items have a performance measure associated with them. Item details are displayed below the order to which they apply. The Standard HTML V.3 format is very similar to the Standard HTML V.1 format. The difference is that Standard HTML V.3 prints each order sentence on its own line, so it will look the same as it does in AuthorSpace.

- o **Standard RTF V.1, RTF**: Saves the order set as a rich text format (RTF) file that can be opened in Word or an RTF editor; drug order details appear on the same line as the medication.

- o **Standard RTF (Edit View) V.2, RTF**: Saves the order set as a rich text format (RTF) file that can be opened in Word or an RTF editor; drug order details appear on a separate line from the medication.

- o **Standard Text V.1, Text**: Saves the order set to a text file that can be opened in WordPad or Notepad.

- o **Standard XLS V.1, XLS**: Saves the order set in a spreadsheet that can be opened in Excel. Any internal notes or tasks associated with an order set item or Section are also saved to the spreadsheet.

Note: Only order sets with a print template applied can be previewed in an editable Preview Window.

You can save the file to print later, open and print the order set, or cancel the action. If you have trouble printing in the format you selected, you may have to indicate in your browser settings that Zynx.com is a trusted site. See the Adding Zynx.com to Trusted Site List section in Optimal Settings for Internet Explorer for information on how to add Zynx.com as a trusted site.

Duplicating Order Sets

You can duplicate any existing Zynx default order sets or customized order sets. See Versioning Order Sets. To duplicate an order set, complete the following steps:

1. Select an order set from the content list and click the **Duplicate** link. The **Duplicate** dialog box opens.
2. Type a name for the order set in the **Content Title** text box. "Copy of" and the name of the order set that you are copying appears by default.
3. From the **Select Module** drop-down list, select a module.
4. In the **destination folder** area, navigate to and select the folder where you want to place the duplicate copy of the order set, on the left.
5. Optional: Select the **Open in editor after duplicating** check box to open the duplicated order set in the Content Editor after you create it.
6. Click the **Duplicate** button to close the dialog box.

Exporting Order Sets

You can build custom order sets and export them in formats that can be downloaded to other systems. To select the export format for an order set, complete the following steps:

1. To open the **Export** dialog box, select an order set from the content list and click the **Export** link.
2. Choose the appropriate XML export format. The format choices that are available are configured in the Environment Manager's Integration Tab.
3. Click the **Go** button.

You can save the file to export later, open and export the order set, or cancel the action.

Build Report Button

Click the **Build Report** button in the **Export** dialog box to create a report that contains relevant details about the build. The report is created in a format that assists users who are responsible for integrating the order set into your hospital's information platform.

Deleting Order Sets

To delete an order set, complete the following step:

1. Select an order set from the content list and click **Delete**. An alert box will appear, asking you to verify that you want to delete the order set.

Only administrators can delete order sets for their environment.

Versioning Order Sets

Released order sets have version numbers. Version numbers are assigned in the following manner:

- If you create a new order set and then release it, that released order set will be assigned as version 1.
- If you select a released/retired order set to **edit**, a draft of that order set is created. Once you release that draft, the version number increases by one. The line of versioning continues because a revised draft of the order set has been released.
- If you create a **duplicate** of a released/retired order set, a new instance of the order set is created. Once you release that draft, it is released as version 1. The line of versioning starts over because a new instance of the order set has been released

Working with Plans of Care in ZynxCare

ZynxCare offers the most advanced evidence-based clinical decision support designed exclusively for nurses and the interdisciplinary care team. The knowledge contained in ZynxCare provides the basis for assessing, planning, and evaluating the care of patients with the most common problems that members of the interdisciplinary care team manage. Each ZynxCare standard plan of care template is linked to concise summaries of the peer-reviewed literature developed by Zynx nurses and allied health professionals.

With AuthorSpace, clients can access Zynx standard plans of care as well as create and customize plans of care for their own hospital or health system. Plans of care are available via the **Content Explorer** menu on the AuthorSpace main screen. See Content Explorer for additional information.

Zynx Standard Plans of Care Templates

Zynx standard plans of care provide the basis for assessing, planning, and evaluating the care of patients with the most common problems managed by the interdisciplinary care team. Each plan of care template

offered by Zynx addresses a specific patient problem. Plans of care include a Goal section (containing Expected Outcomes) and an Intervention section. The Intervention section contains subsections (which include Reminders, Activities, and Activity Details).

Clients can view, duplicate, print, or export these templates. Zynx standard plans of care templates reside in the Zynx folder in the Content Tree. When you select a folder, the contents of the folder appear in the content list on the right side of the screen. Select a plan of care in the content list and then click any of the following links below the Content Title to perform these tasks:

- Duplicate: Create a copy of the selected plan of care.
- Plan of Care Content Title: Open the Content Viewer to view the selected plan of care.
- Print: Save and print the selected plan of care in a text format.
- Export: Export the selected plan of care in XML and to create a report with relevant details about the build. See the Integration Tab for information on configuring XML export formats.

Users cannot edit or manage Zynx plans of care.

Customized Plans of Care

With AuthorSpace, clients can create customized plans of care by adding new plans, copying existing plans of care, and/or editing plans of care by adding, deleting, or editing Sections or order items.

When a plan of care is selected for editing, the plan of care is checked out to the user making the edits. No one else can see the changes until the plan of care is checked back in. In addition, no one else can edit a checked-out plan of care. A lock icon next to a plan of care in the content list indicates it is checked out for editing. When the user has finished editing the plan of care, the user checks the plan of care back in. At that point, the plan of care can be released to the environment. Released plans of care are assigned version numbers.

Customized plans of care reside in the Our Content folder in the Content Tree. When you select a folder, the contents of the folder appear in the content list on the right side of the screen. Select a plan of care in the content list and then click any of the following links below the Content Title to perform these tasks:

- Duplicate: Create a copy of the plan of care. The duplicate plan of care opens in the content grid.
- Edit: Open the Content Editor where you can customize the selected plan of care. A lock icon next to a plan of care in the content list indicates it is checked out for editing. To display who the plan of care is checked out to, hover your mouse over the lock icon. Other users will not see the changes until the plan of care is checked back in.
- Plan of Care Content Title: Open the Content Viewer to view the selected plan of care.
- Manage: Open the Content Manager to manage information about the selected plan of care. In the Content Manager, you can edit the header, release the plan of care, make the plan of care reviewable, and manage/set the reviewers of the plan of care. You are also able to mark the plan of care as linkable content (once it has been released) and publish the plan of care to ViewSpace. The Content Manager also displays information such as the review status, comments, and update history
- Review: Leave review comments for any content in Review status. When you click the **Review** button, the plan of care opens the reviewer pane for adding comments.
- **Check In**: Check in the selected plan of care with your changes applied.
- **Undo**: Check in the selected plan of care without applying any changes. If you have made changes to the plan of care and then click this link, all your changes will be lost.
- Print: Save and print the selected plan of care.

- Export: Print the selected order set in XML to create a report with relevant details about the build. See the Integration Tab for information on configuring XML export formats.
- Delete: Delete the selected plan of care.

The buttons that are available depend on the assigned user permission levels.

Adding New Plans of Care

You can create new plans of care by adding an empty plan of care or by duplicating an existing plan of care and then customizing it the way you want. To add a new plan of care to any module, complete the following steps:

1. At any location in the Content Tree, click the **New Content** link at the top of the content list to open the **New Content** dialog box.
2. In the **Content Title** text box, type the name of the new plan of care.
3. In the **Content Type** box, select Plan of Care.
4. Optional: From the **Please select a module** drop-down list, make a selection.
5. In the **destination folder area**, select the folder where you want to save the plan of care, on the left.
6. Optional: Select the **Open in editor after duplicating** check box to open the duplicated order set in the Content Editor after you create it.
7. Click **Create** to create the plan of care.

See Customizing and Editing Plans of Care. To add a new plan of care by duplicating an existing plan of care, see Duplicating Plans of Care.

Viewing Plans of Care in the Content Viewer

To view plans of care for your hospital or health system, select the plan of care from the content list and click the **Content Title** to open the Plan of Care in the Content Viewer.

For more information, see Using the Content Viewer and Content Viewer/Editor Icons.

Managing a Plan of Care with the Content Manager

To manage a plan of care, select a checked-in plan of care from the content list and click **Manage** to open the Content Manager. The Content Manager shows the following information:

- Links at the top of the screen enable users with appropriate permissions to change the status of the plan of care (depending on the current status, you may see links for Release, Retire, Revert to Draft, or Make Reviewable), or request a review of the order set and manage the reviewers.
- Check boxes at the top of the screen enable users to mark the plan of care as a linkable plan of care, or to publish the plan of care to ViewSpace so that it is accessible to Zynx Health Reference Site users. Plans of care published to ViewSpace are noted by the 💬 icon in the content list (see Content Explorer).
- The header information at the top of the **Content Manager** shows details about the plan of care, such as expiration date, venue, assigned team, etc. To edit any of the header information, click **Edit Header** at the top of the **Content Manager** screen. See Editing Plans of Care Header Information.
- The Review Status section shows a list of review requests. The request date, the name of the reviewer, the status of the review, and the review date are displayed.
- The Plan of Care Reviews section displays the review date, the reviewer, and the general review

comments.

- The Plan of Care History section shows major changes made to the plan of care, the user who made the change, and the date and time the change was made. The most recent changes are listed first.

Perform the following tasks with the Content Manager:

- Editing Plans of Care Header Information
- Initiating/Requesting a Review for a Plan of Care in the Content Manager
- Checking the Status of a Review for a Plan of Care in the Content Manager
- Managing Reviewers for a Plan of Care in the Content Manager
- Changing the Status of Plans of Care
- Marking the Plan of Care as Linkable Content

Editing Plans of Care Header Information

The top of the **Content Manager** screen shows header information for the plan of care. Only administrators or Environment Managers can make edits in the Edit Header screen. To edit any of the header information, complete the following steps:

1. In the Content Manager, click the **Edit Header** link to open the **Edit Header** screen.
2. Edit any of the following fields/areas:

   o **Rename**: This field allows you to rename the plan of care. Type a new name for the plan of care in the field.

   o **Expiration Date:** Click the calendar icon and select the appropriate date or type a date in the field using any of the following 10-character formats: MM/DD/YYYY, MM-DD-YYYY, or MM.DD.YYYY. This is the date the plan of care expires.

   o **External ID**: Type a new external ID for the plan of care. The external ID is optional, depending on your environment. This ID is output in an export file.

   o **Comments**: Type new comments or edit existing comments for the plan of care as necessary. Comments are unique to the environment.

   o **Edit Module**: Click in the **Change Module To** drop-down list and select from the list to change the module that the plan of care applies to.

   o **Edit Institution**: Select an institution to associate to the plan of care from the **Change Institution To** drop-down list.

   o **Edit Venue & Event**: Click in the **Change Venue To** drop-down list and select from the list to change the clinical location for the plan of care. Click in the **Change Event To** drop-down list and select from the list.

   o **Edit Team/Edit Owner**: Click in the **Change Team To** drop-down list and select from the list to change the team assigned to the plan of care. Click in the **Change Owner To** drop-down list and select from the list to change the owner of the plan of care.

The status of the plan of care determines which fields can be edited. For a Draft plan of care, you can edit all the fields. However, for a Released plan of care, you can only edit the expiration date, comments, team, and owner fields. The **Change Module To**, **Change Venue To**, and **Change Event To** fields are not available for editing.

3. Click the **Save** button.

Initiating/Requesting a Review for a Plan of Care in the Content Manager

You can set up a plan of care so that it may be reviewed by other users in the environment. You can send a request via e-mail to select users asking them to review your plan of care. To initiate this review, you must change the status of the plan of care to Review and then publish the plan of care to ViewSpace so that it is accessible to Zynx Health Reference Site users. To initiate the review of a plan of care, complete the following steps:

1. In the Content Manager, click the **Make Reviewable** link. This changes the status of the plan of care to Review. Once the plan of care has this status, comments/feedback from reviewers may be added, pertaining to the entire plan of care or to a specific order item within the plan of care. To add comments, see Adding a Review Comment to a Plan of Care in AuthorSpace.
2. Select the **Publish to ViewSpace** check box. This publishes the plan of care to ViewSpace so that it is accessible to Zynx Health Reference Site users.
3. To request a review, click the **Request Review** link at the top of the screen to open the **Request Review** dialog box. Complete the fields in the dialog box.

   o Specify the reviewer. Click **To** and select one or more reviewers from the system address book or click **New Reviewer** to create a new reviewer in the **New Reviewer** dialog box. See New Reviewer Dialog Box.
   o Compose a message to the reviewers in the **Message** text box.

   Click **Send** to send the request via e-mail to the specified reviewer(s). The e-mail includes a link to the plan of care. The e-mail request also lists all individuals to whom a review request was sent, and the e-mail address of the user who initiated the review request.

To check the status of the review, refer to the Review Status section of the Content Manager screen. See Checking the Status of a Review for a Plan of Care in the Content Manager.

Select E-mail Screen
Search for a reviewer from the system address book. Reviewers, distribution lists, teams, and authors are displayed in an alphabetized list.

Complete the fields at the top of the **Select E-mail** screen, specify include criteria, and click the **Perform Search** button.

New Reviewer Dialog Box
To add a new reviewer to the address book for an environment, fill out the **New Reviewer** dialog box. Specify the first and last name of the reviewer as well as the user's e-mail address and then click **Save**.

If the name and e-mail address already exist in the system, a message appears indicating this.

Checking the Status of a Review for a Plan of Care in the Content Manager
You can check the status of a review in the **Content Manager** screen. The review status is only tracked for users logged in to ViewSpace as registered reviewers. In the content list, select the plan of care being reviewed and then click the **Manage** link to open the **Content Manager** screen. Scroll down to the Review Status section near the bottom of the screen to view the request date, the name of the reviewer, the status of the review, and the review date.

ViewSpace Notifications
When you initiate a review, you are automatically signed up to receive ViewSpace Notifications. ViewSpace

Notifications arrive via a daily digest e-mail delivered between 3:30 and 5:30 AM PST, and include any comments or replies that were made within the previous 24 hours on content that you sent for review. Reviews can be generated in 3 ways:

- Request a review through the Content Manager.
- Activate content with a review step through Workflow Management.
- Add a reviewer through the Track Progress page in Workflow Management by editing the People.

E-mails are sent only if a comment is added to the content you sent for review. If no comments or replies have been added since the last notification, a new e-mail will not be sent. You will be subscribed to ViewSpace Notifications for as long as the content remains in Review status. Once the status changes to Draft or Released, you automatically stop receiving ViewSpace Notifications for that order set or plan of care.

A sample e-mail notification appears below:

- **Link to Content in ViewSpace**: Access the content in ViewSpace. This will provide the additional context needed to understand the comments. If you are using a text-only e-mail client, and the ViewSpace link does not work, copy and paste the URL into a Web browser.
- **Unsubscribe**: Unsubscribe from any notifications regarding this plan of care. To re-subscribe,

contact Zynx Product Support.

- **Global Unsubscribe**: Unsubscribe from all ViewSpace Notifications. To re-subscribe, contact Zynx Product Support.
- **Submit feedback regarding ViewSpace Notifications**: Report defects, suggest changes, and provide other comments related to this enhancement directly to Zynx Product Support.

Managing Reviewers for a Plan of Care in the Content Manager
Users with appropriate permission can create or edit a registered reviewer or a distribution list.

- "Author" refers to an individual who is an AuthorSpace account holder (AuthorSpace user).
- "Reviewer" refers to an individual who is not an AuthorSpace account holder but who is invited to provide feedback on an order set or plan of care.
- A distribution list is a named collection of reviewers that can be used to facilitate sending a review request to a group of people. It is like an e-mail mailing list and is global to a client environment. It is composed of a group of registered reviewers and/or authors.

Creating a Reviewer in the Content Manager
Users with appropriate permission can create a reviewer. To create a reviewer, complete the following steps:

1. In the content list, select a plan of care and then click the **Manage** link to open the **Content Manager** screen.
2. If a user does not have correct permission, the **Manage** link will be unavailable. Click the **Manage Reviewers** link at the top of the screen. The **Manage Reviewers** main screen opens and displays an address book of reviewers, authors, teams, and distribution lists for the client environment.
3. Click the **New Reviewer** link to open the **New Reviewer** dialog box to create a registered reviewer. Specify the first and last name of the reviewer as well as the e-mail address and then click **Save** to return to the **Manage Reviewers** main screen. If the e-mail address already exists in the system, an error message is displayed indicating that the e-mail address is already registered to another user. The alert also lists the role (Author or Reviewer) associated with the account. Correct the data or cancel and close the **New Reviewer** screen.
4. Click the **Close** link in the upper right corner to close the **Manage Reviewers** screen.

You have created a new registered reviewer whose name will appear in the address book.

Editing a Reviewer for a Plan of Care in the Content Manager
Reviewers can be edited by users with either Administrator or Environment Manager privileges; however, Authors and Teams cannot be selected for editing in the address book unless the Author or Team does not have a name or e-mail address available. To edit a reviewer, complete the following steps:

1. In the content list, select a plan of care and then click the **Manage** link to open the **Content Manager** screen.
2. If a user does not have correct permission, the **Manage** link will be unavailable. Click the **Manage Reviewers** link at the top of the screen. The **Manage Reviewers** main screen opens and displays an address book of reviewers, authors, teams, and distribution lists for the client environment. Mouse over a team or distribution list to display a tooltip showing a list of the members whose names and e-mail addresses are missing.
3. Double-click a reviewer from the address book, or single-click a reviewer and click the **Edit** link at the top. The **Edit Reviewer** screen opens.
4. Edit the desired field and click the **Save** link. Reviewer information is updated and validated

according to the following:

- o A reviewer is uniquely identified by the combination of e-mail address and client environment. Therefore, an e-mail address may be associated with only one Reviewer within a given client environment.
- o An AuthorSpace account holder may not be entered into the system as a reviewer, but an AuthorSpace account holder may be included in a Distribution List.

Creating a Distribution List for a Plan of Care in the Content Manager

Users with either Administrator or Environment Manager privileges can create a distribution list. To create a distribution list, complete the following steps:

1. In the content list, select a plan of care and then click the **Manage** link to open the **Content Manager** screen.
2. If a user does not have correct permission, the **Manage** link will be unavailable. Click the **Manage Reviewers** link at the top of the screen. The **Manage Reviewers** main screen opens and displays an address book of reviewers, authors, teams, and distribution lists for the client environment.
3. Click the **New Distribution List** link at the top of the screen. The **New Distribution List** screen appears. Complete the requested data and click **Save**.

   - o **List Name**: Provide a name for the distribution list
   - o **Create Date**: This date is automatically populated with the current date.
   - o **Last Modified Date**: This date is automatically populated with the date on which the distribution list was last modified.

   The screen shows 2 list boxes labeled Address Book and Distribution List. (See screenshot at end of section)

   - o The **Address Book** lists the available authors and reviewers for the environment who may be added to a distribution list.
   - o The **Distribution List** shows the authors and reviewers who make up the distribution list.

4. To add authors, reviewers, or distribution lists to the Distribution List, select the appropriate check box in the Address Book list box and click the > link.
5. To remove authors, reviewers, or distribution lists from the Distribution List, select the appropriate check box in the **Distribution List** box and click the < link. The names are moved back to the Address Book.

   - o To add all authors, reviewers, and distribution lists from the Address Book to the Distribution List, click the >> link.
   - o To remove all authors, reviewers, and distribution lists from the Distribution List, click the << link.

Editing a Distribution List for a Plan of Care in the Content Manager
Users with either Administrator or Environment Manager privileges can edit a distribution list. To edit an existing distribution list, complete the following steps:

1. In the content list, select a plan of care and then click the **Manage** link to open the **Content Manager** screen.
2. If a user does not have correct permission, the **Manage** link will be unavailable. Click the **Manage Reviewers** link at the top of the screen. The **Manage Reviewers** main screen opens and displays an address book of reviewers, authors, teams, and distribution lists for the client environment.

3. Double-click a distribution list from the address book or single-click a distribution list and click the **Edit** link at the top of the screen. The **Edit Distribution List** screen opens.
4. Edit the list and click **Save**. You may revise the list name or add or remove names from the Distribution List.
5. To add authors, reviewers, or distribution lists to the Distribution list, select the appropriate check box in the Address Book list box and click the > link.
6. To remove authors, reviewers, or distribution lists from the Distribution List, select the appropriate check box in the Distribution List and click the < link. The names are moved back to the address book.

   o To add all authors, reviewers, and distribution lists from the address book to the Distribution List, click the >> link.
   o To remove all authors, reviewers, and distribution lists from the Distribution List, click the << link.

Deleting a Reviewer or Distribution List for a Plan of Care in the Content Manager

Users with either Administrator or Environment Manager privileges can delete Reviewers or Distribution lists. To delete a Reviewer or Distribution List, complete the following steps:

1. In the content list, select a plan of care and then click the **Manage** link to open the **Content Manager** screen.
2. If a user does not have correct permission, the **Manage** link will be unavailable. Click the **Manage Reviewers** link at the top of the screen. The **Manage Reviewers** main screen opens and displays an address book of reviewers, authors, teams, and distribution lists for the client environment. Mouse over a team or distribution list to display a tooltip showing a list of the members whose names and e-mail addresses are missing.
3. Select a Reviewer/Distribution List from the list and click the **Delete** link at the top of the screen. When prompted, click **Yes** to confirm the deletion.

Changing the Status of Plans of Care

Users with either Administrator or Environment Manager privileges can change the status of plans of care in the Content Manager by clicking the appropriate link at the top of the Content Manager. The link that is available depends on the status assigned to the plan of care. The following table shows valid status changes:

Plans of care with this Status…	Can be changed to this status…
Draft	Released or Review
Review	Released or Draft
Released	Retired
Retired	You can create a Draft version of the Retired plan of care by duplicating it

Marking the Plan of Care as Linkable Content

Select the **Mark as Linkable Content** check box at the top of the Content Manager to flag the plan of care as a linkable plan of care. Once a plan of care is flagged as linkable content, it is available to be added to another order set or to another plan of care. See Adding Linkable Content to an Order Set and Adding Linkable Content to a Plan of Care.

Reviewing Plans of Care

To review a plan of care, select any plan of care with a Review status from the content list and click **Review** to open the Content Reviewer. You can add, edit, review, and print review comments associated with plans of care. This section consists of the following information:

- Adding a Review Comment to a Plan of Care in AuthorSpace
- Editing/Hiding a Review Comment for a Plan of Care in AuthorSpace
- Printing Review Comments for a Plan of Care in AuthorSpace
- Viewing Review Comments for a Plan of Care in AuthorSpace
- Searching a Plan of Care in the Content Reviewer

Adding a Review Comment to a Plan of Care in AuthorSpace

A comment refers to any feedback or questions posted to a reviewable plan of care. A comment may relate to the entire plan of care or to a single item within the plan of care. A comment may have responses added to it by the plan of care author or reviewers. AuthorSpace users initiating the review may also use the comments functionality to post questions to their reviewers.

Linkable content appears collapsed in Review mode. Click **View Linked Content** to expand the content in a separate **Content Viewer** window. Users will have the ability to comment on the linkable content as a whole, but not on individual items. Comments on individual items within the linkable content can be made at the time the linkable content is reviewed. To add a comment, complete the following steps:

1. In the content list, select a plan of care with a Review status and then click the **Review** link. The Content Reviewer opens and is divided into 3 panes. Use the scroll bars in each pane to view all the information. Click the gray divider line between the panes and drag the line either up or down to resize any of the panes.

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When you click on linkable content to comment on it, the top feedback pane is called the Linkable Comments pane, instead of Item Comments.

2. To post a comment about a single order item, select the order item in the left-hand pane. Click the **Start New Topic** link in the Item Comments pane to open the **New Comment** dialog box. The dialog box identifies the plan of care and order item that the comment relates to. To post a general comment that applies to the entire plan of care, click the **Start New Topic** link in the General Feedback pane to open the **New Comment** dialog box.

3. Complete the fields in the **New Comments** dialog box and click **Save**.

    o   Enter your comment in the **Comment** box. This is a free text field.
    o   (Optional) Select the rating scale for your reviewer to use. You can choose a rating scale that is appropriate for the nature of your review. For example, you can choose a scale that allows the reviewer to rate an order from 1-5, or to specify whether he agrees, disagrees, or has no opinion. Only the owning author can post a new comment with a rating scale. (This functionality is only available from the Content Reviewer in AuthorSpace. It is not available in ViewSpace.)
    o   Set the status to either Active or Hidden, depending on whether you want your comment displayed. (This functionality is only available from the Content Reviewer in AuthorSpace. It is not available in ViewSpace.)

4. Click the **x** in the upper right-hand corner to close the Content Reviewer.

You can edit/hide a comment from the Content Reviewer in AuthorSpace. (This functionality is not available in ViewSpace.) See Initiating/Requesting a Review for a Plan of Care in the Content Manager.

Editing/Hiding a Review Comment for a Plan of Care in AuthorSpace
Posted comments may be edited by any user with edit rights to the plan of care if no replies are posted to the comment in ViewSpace. A reply to a comment may not be edited after it has been posted.

Once a reply has been posted, a comment can be hidden but cannot be edited in any other way. When the author hides the comment, the system sets the status to hidden and no longer displays the comment in ViewSpace. To edit or hide a comment, complete the following steps:

1. In the content list, select a plan of care with a Review status and then click the **Review** link. The Content Reviewer opens and is divided into 3 panes. Use the scroll bars in each pane to view all the information. Click the gray divider line between the panes and drag the line either up or down to resize any of the panes.

2. Select the desired comment in either the Item Comments pane or the General Feedback pane.
3. Click the **Edit Topic** link to open the **Edit Comment** dialog box.
4. Complete the fields as appropriate and click the **Save** button. If the comment has no replies posted, all fields may be edited. However, if the comment does have replies, only the status field may be edited. If the status was set to hidden and **Hide Hidden Comments** is selected, the comment and responses are removed from the Content Reviewer but not deleted from the database.

Printing Review Comments for a Plan of Care in AuthorSpace

You may print review comments and later use the printed comments to edit the plan of care in AuthorSpace. Comments are printed in the order they appear on-screen. To print comments, complete the following steps:

1. In the content list, select a plan of care with a Review status and then click the **Review** link to open the Content Reviewer.
2. Select **Print > Print Comments** from the menu at the top of the screen. The **Print Comments** dialog box opens.
3. Select **Print General Comments**, **Print Item Comments**, or **Export to Excel**.
4. Click the **Print** button. General Comments and order item comments are printed in separate tables with the following columns:

   o Status Date

- o   Status
- o   Reviewer Last Name
- o   Reviewer First Name
- o   Comment Text
- o   Rating

Viewing Review Comments for a Plan of Care in AuthorSpace
You can see review comments for a plan of care. All new thread comments appear in chronological order, with the newest comments at the top. Replies to comments will be below the comment that is replied to. To view review comments for a plan of care, complete the following steps:

1.   In the content list, select a plan of care with a Review status and then click the **Review** link. The Content Reviewer opens and is divided into 3 panes. Use scroll bars in each pane to view all the information. Click the gray divider line between the panes and drag the line either up or down to resize any of the panes.
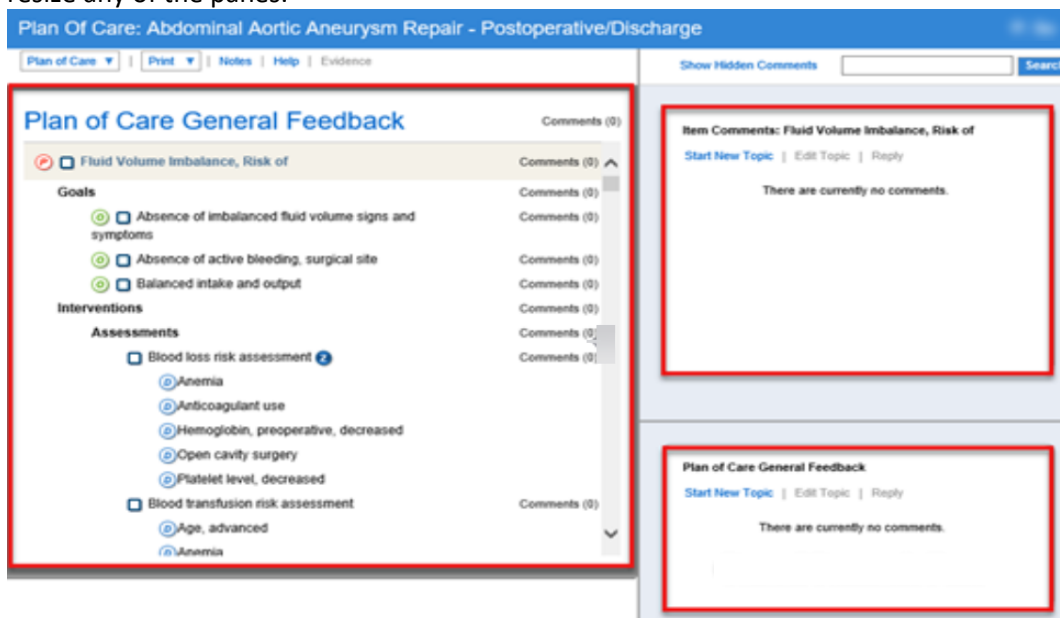
Note: By default, comments with a hidden status are hidden, and the **Show/Hide Hidden Comments** changes to **Show Hidden Comments**.
2.   Click the **Show Hidden Comments** link to display the hidden comments. The **Show Hidden Comments** link is changed to **Hide Hidden Comments**.

You can also view general review comments in the Plan of Care Reviews section in the Content Manager.

Searching a Plan of Care in the Content Reviewer
The author or reviewer can perform a Find-in-Page text search within a single plan of care in the Content Reviewer. The Find-in-Page text search searches the content as well as the review comments. Open the plan of care in the Content Reviewer and then complete the following step:

1. Enter search text in the text input box at the top right of the **Content Reviewer** screen and click **Search**. Results are highlighted as such:

   o Search results appear highlighted; the pane automatically scrolls to display the first instance of the search result.
   o If the text is found in the review comments for a content item, the **Comments** link is highlighted.

Using Advanced Search in the Content Reviewer

Open the plan of care in the Content Reviewer and then complete the following steps:

1. Select **Plan of Care > Advanced Search** to open the **Find** dialog box.
2. Complete the dialog box to define your search, and then click the **Find** button:

   o **Find What** box: Specify the search text in the **Find What** input box.
   o **Find on Content Object** check box: When selected, content will be searched. This is selected by default.
   o **Find on Reviews & Feedback** check box: When selected, the review comments will be searched. This is selected by default.
   o **Match case** check box: When selected, only results that match the case of the search term will be found. This option is not selected by default.
   o **Match whole word** check box: When selected, results that match the whole search term will be found. This option is not selected by default.

   The search results appear highlighted similarly to the basic search in Content Reviewer.

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Customizing and Editing Plans of Care

Plans of care address patient problems. Plans of care include a Goals section (containing Expected Outcomes) and an Interventions section. The Interventions section contains subsections (which include Reminders, Activities, and Activity Details).

To edit and customize plans of care for your hospital or health system, select the plan of care from the content list and click the **Edit** link to open the Plan of Care in the Content Editor.

- See Navigating the Content Editor for information on the Content Editor layout.
- See Using Shortcut Keys to see a list of shortcut keys for the Content Editor.
- See Content Viewer/Editor Icons for an explanation of the icons that appear in the Content Editor.

Plans of care are assigned version numbers. A released or retired plan of care cannot be edited without changing the version number. If you choose a released or retired plan of care for editing, you will be prompted to create a draft version of the plan of care, and a new version number will be assigned when that draft is released. See Versioning Plans of Care for additional information.

Perform the following tasks within the Content Editor:

- Moving Items Within a Plan of Care
- Copying and Pasting Items Within a Plan of Care
- Inserting Plans of Care
- Adding Linkable Content to a Plan of Care
- Adding a Problem to a Plan of Care
- Adding a Section to a Plan of Care
- Adding an Activity to a Plan of Care
- Adding an Outcome to a Plan of Care
- Adding a Reminder to a Plan of Care
- Adding an Activity Detail to a Plan of Care
- Removing Items from a Plan of Care
- Flagging Items in a Plan of Care
- Modifying Items in a Plan of Care
- Adding Notes and Build Notes to a Plan of Care
- Editing Notes and Build Notes
- Viewing Notes and Build Notes in a Plan of Care
- Deleting Notes and Build Notes from a Plan of Care
- Adding Tasks to a Plan of Care
- Viewing Tasks for a Plan of Care
- Completing Tasks for a Plan of Care
- Deleting Tasks from a Plan of Care
- Editing Tasks in a Plan of Care

Moving Items Within a Plan of Care

Use the drag and drop operation to move items or Problems within a plan of care. Follow these guidelines when using the drag-and-drop operation:

- When dragging a Problem onto another Problem, the default behavior is to sort the dragged Problem at the same level as the target Problem.
- To move a Section item so that it appears as a subsection under another Section item, hold the Shift key while dragging and dropping onto the target Section.
- You cannot drag and drop a Problem into a subsection of another Problem.

Copying and Pasting Items Within a Plan of Care

You can copy and paste items in the Editor or you can copy items from the Content Viewer and then paste them into a plan of care in the Editor. To copy and paste within the Editor, complete the following steps:

1. In the Editor, click the arrow to the right of the **Edit** button on the line you wish to copy and select **Copy** or press CTRL+C. If your selection has children associated with it, a dialog box appears, asking whether you wish to copy the children as well.
2. Click where you want to paste the Section or item.
3. Click the arrow to the right of the **Edit** button and select **Paste** or press CTRL+P. The items will be pasted at the specified location. If you did not specify a location, the item will be pasted at the bottom of the plan of care.

To copy items from the Content Viewer and paste them into a plan of care in the Editor, complete the following steps.

1. In the Content Viewer, select the item you wish to copy and then click **Copy** from the **Commands Menu**. If the item has children, a dialog box appears, asking if you wish to copy the children.
2. Open another plan of care in the Editor, navigate to the appropriate location, and click the arrow to the right of the **Edit** button and select **Paste**.

Inserting Plans of Care

You can insert customized released plans of care into an existing plan of care. Zynx default plans of care cannot be inserted into an existing plan of care. To insert a plan of care, complete the following steps:

1. To insert the plan of care as a top-level item, select **Add Top Level Item**.
2. Select **Content** in the Workspace Editor. Click the **Browse** link to open the **Insert Plan of Care** dialog box. A tree-view of folders containing customized released content appears on the left side of the dialog box.
3. Navigate the tree-view to find the plan of care that you wish to insert. In the tree-view, click ⊞ to expand a folder; click ⊟ to collapse a folder. Click a folder to view its plans of care on the right side of the dialog box.
4. Select a plan of care and click the **OK** button.

Adding Linkable Content to a Plan of Care
You can add linkable content at the bottom of the plan of care.

Linkable content is any released content (order set or plan of care) that has been marked as linkable content in the Manager. (See Marking the Order Set as Linkable Content and Marking the Plan of Care as Linkable Content.)

Linkable content can be added to any plan of care. Although it cannot be modified within the plan of care, when the original linkable content is updated, the updates will appear in all the plans of care in which the linkable content is housed.

- **When printed or exported**: Linkable content will be fully expanded when printed or exported. All linkable content items will be displayed within the plan of care. If you insert linkable content as virtual linkable content, just the display name of the linkable content appears (as a placeholder) when the plan of care is printed or exported, instead of displaying the linkable content in its entirety.

  Note: If you plan to export your plan of care to an EHR system, please check your integration manual for instructions on whether your system can handle linkable or virtual linkable content.

- **In View and Review mode**: Linkable content will appear collapsed with an identifying icon (🔗 for linkable content, and 🔗 for virtual linkable content). Click on the linkable item to open the full linkable content in View mode in another window.

To add linkable content, complete the following steps:

1. Select **Add Top Level Item**.
2. Select **Linkable Content** in the Workspace Editor.
3. Select the **Virtual Linkable** check box if you wish to display this linkable content as virtual linkable content.
4. Click **Browse** next to the **Map** field to open the **Insert Linkable Plan of Care** window. A tree-view of the content folders appears on the left side.
5. Navigate to the appropriate linkable content in the tree-view. In the tree-view, click ⊞ to expand a folder; click ⊟ to collapse a folder. Click a folder to view its contents on the right side.
6. Select the linkable content and click the **OK** button. The selected name appears in the **Map** field.

   o (optional) Type a name in the **Display** field for the linkable content. This is the name for the linkable content that will be displayed in the order set. If there is a display name and a linkable content name, only the display name will be used.
   o Click the **View** link to display the expanded linkable content in the Viewer.
   o Click the **Clear** link to search for different linkable content.

7. Optional: The **Comments** text box can be used to add free text comments. If an item has comments, the 💬 icon will appear next to the item in the Viewer and Editor. Users can hover over the icon to display the comments.
8. Click the **Save** button to submit the change.

Managing Linkable Items in a Plan of Care

When you release a new version of a linkable item (virtual or nonvirtual), any content in Draft or Review status containing the linkable is automatically updated. However, the linkable will not be updated if it appears in Released content. When you attempt to release linkable content that is contained within a Released order set, the **Linked Content** dialog box appears (shown below), with options for updating the Released content.

The **Linked Content** dialog box lists the Released content by type and indicates whether a new version of the content exists in Draft/Review status. Use this information to determine how to proceed.

- If a new version of the content does not exist in Draft/Review status, select the **Automatically Apply Change** option or the **Apply and Edit Change** option from the dialog box. You can either leave the new content in Draft status or release it immediately, depending on where that content is in your review/approval process.
- If a newer version of the content exists in Draft/Review status, select the **Disregard Change** option from the dialog box. Any content in Draft/Review status will automatically be updated when you release the new linkable content.
- If you find that you need to do further research prior to making your selections and releasing the linkable, click on the **Run Report** button to generate an Excel spreadsheet populated with the information from the dialog box.

To make your selections, click the radio button in the desired column for the appropriate content. If you click **Select all below**, all radio buttons in that column will be selected.

If you click the **Cancel** button or close the dialog box by clicking the **x** in the upper right-hand corner of the dialog box, the dialog box will close, and the linkable content will not be released.

Adding a Problem to a Plan of Care

Plans of care consist of Problems or linkable content at the highest hierarchical level. Content within the Problems are organized by Sections, Reminders, Expected Outcomes, Activities, and Activity Details. To add a new Problem, complete the following steps:

1. Select **Add Top Level Item**.
2. Select **Problem** in the Workspace Editor.
3. From the **Print/Export** options, you may select **Print Only** or **Export Only** (the default is **Both**). In Print View, items marked as Export Only will not be displayed. In Export View, items marked as Print Only will not be displayed.
4. From the **Pre-Select** options, select any of the following options:

   o **Optional**: If you select this option, the item will not be preselected in the customized plan of care. Its check box will be unchecked. The item can be manually selected in the plan of care.
   o **Default**: If you select this option, the item will be preselected in the customized plan of care. Its check box will appear with a check mark in it.
   o **Required**: If you select this option, the item will appear as a required item in the customized plan of care.

5. From the **Evidence** options, you may select one of the following options:

   o **None**: This is the default setting.
   o **Zynx**: If you select this option, the **Choose Evidence** dialog box will open, allowing you to construct the path for the evidence by selecting the product, module, and evidence you want to link to.
   o **Custom**: If you select Custom, type the URL in the box.

6. Populate one of the following fields to name the Section:

   o **Catalog**: Click the **Browse** button to open the AuthorSpace Catalog to search the Custom catalog, Zynx catalog, or the Zynx + Custom catalog. The term you select from the catalog will populate the **Catalog field**. This is the name of the Problem Section that will appear in the plan of care.
   o To clear the **Catalog** field, click the **Clear** link.
   o **Override**: If you wish to change the name of the Problem Section to something other than what appears in the **Catalog** field (without changing meaning), type free text in the **Override** text box. This is the name that will be reflected in the plan of care.

Text in the **Override** field is free text and is not recommended for plan of care integration. In general, you should always refer to your integration manual for instructions on how to optimally build for integration.

7. The **Additional Info** field is free text; type the detail that will be appended to the name (catalog term or override) in the displayed plan of care.
8. Optional: The **Comment** text box can be used to add free text comments. If an item has comments, the ⊟ icon will appear next to the item in the Viewer and Editor. Users can hover over the icon to display the comments.
9. Click the **Save** button. (To minimize the Workspace Editor, click the **Save & Hide** button.)

The new Problem appears at the bottom of the plan of care by default. You can then drag and drop it to the

desired location.

For the Problem Section, click the arrow to the right of the **Edit** button and select **Insert** (or press CTRL+I) to add any of the following items:

- Section. See Adding a Section to a Plan of Care.
- Reminder. See Adding a Reminder to a Plan of Care.
- Outcome. See Adding an Outcome to a Plan of Care.
- Activity. See Adding an Activity to a Plan of Care.

To add an Activity Detail to an Activity, click the arrow to the right of the **Edit** button and then select **Insert** or press CTRL+I. See Adding an Activity Detail to a Plan of Care.

Assigning or Removing Performance Measures for a Plan of Care in the Content Editor
You can assign or remove a performance measure from an item by editing the item and completing the following steps:

1. Select the **Performance Measures** tab from the Workspace Editor to view a list of performance measures.
2. Select the performance measure(s) from the list that you wish to assign. Or de-select the performance measure(s) that you wish to remove from the item.
3. Click the **Save** button. (To minimize the Workspace Editor, click the **Save & Hide** button.)

   o Click the **Reset** button at any time to clear any selected items.
   o The **Performance Measures** icon (🎖) will appear next to the item in the Editor that has been assigned a performance measure.

Adding a Section to a Plan of Care
You can add a new Section to an existing Section or Problem. To add a new Section, complete the following steps:

1. For an existing Section or Problem, click the arrow to the right of the **Edit** button and select Insert, or press CTRL+I.
2. Select **Section** from the Workspace Editor.
3. From the **Print/Export** options, you may select **Print Only** or **Export Only** (the default is **Both**). In Print View, items marked as Export Only will not be displayed. In Export View, items marked as Print Only will not be displayed.
4. From the **Evidence** options, you may select one of the following options:

   o **None**: This is the default setting.
   o **Zynx**: If you select this option, the **Choose Evidence** dialog box will open, allowing you to construct the path for the evidence by selecting the product, module, and evidence you want to link to.
   o **Custom:** If you select Custom, type the URL in the box that appears.

5. Populate one of the following fields to name the Section:

   o **Catalog**: Click the **Browse** button to open the AuthorSpace Catalog to search the Custom catalog, Zynx catalog, or the Zynx + Custom catalog. The term you select from the catalog will populate the **Catalog field**. This is the name of the Section that will appear in the plan of care.
   o To clear the **Catalog** field, click the **Clear** link.
   o **Override**: If you wish to change the name of the section to something other than what appears in the **Catalog** field (without changing meaning), type free text in the **Override** text box. This is the name that will be reflected in the plan of care.

Text in the **Override** field is free text and is not recommended for plan of care integration. In general, you should always refer to your integration manual for instructions on how to optimally build for integration.

6. The **Additional Info** field is free text; type the detail that will be appended to the name (catalog term or override) in the displayed plan of care.
7. Optional: The **Comment** text box can be used to add free text comments. If an item has comments, the ▤ icon will appear next to the item in the Viewer and Editor. Users can hover over the icon to display the comments.
8. Click the **Save** button. (To minimize the Workspace Editor, click the **Save & Hide** button.)

You can add the following items within a Section by clicking the arrow to the right of the **Edit** button and then clicking **Insert**:

   ▪ Section. See Adding a Section to a Plan of Care.
   ▪ Reminder. See Adding a Reminder to a Plan of Care.
   ▪ Activity. See Adding an Activity to a Plan of Care.
   ▪ Outcome. See Adding an Outcome to a Plan of Care.

Adding an Activity to a Plan of Care
You can add an Activity to a Problem, Section, or Expected Outcome. To add an Activity, complete the following steps:

1. From an item in the plan of care, click the arrow to the right of the **Edit** button and select Insert, or press CTRL+I.
2. Select **Activity** in the Workspace Editor.
3. From the **Print/Export** options, you may select **Print Only** or **Export Only** (the default is **Both**). In Print View, items marked as Export Only will not be displayed. In Export View, items marked as Print Only will not be displayed.
4. From the **Pre-Select** options, select any of the following options:

   o **Optional**: If you select this option, the item will not be preselected in the customized plan of care. Its check box will be unchecked. The item can be manually selected in the plan of care.
   o **Default**: If you select this option, the item will be preselected in the customized plan of care. Its check box will appear with a check mark in it.
   o **Required**: If you select this option, the item will appear as a required item in the customized plan of care.

5. From the **Evidence** options, you may select one of the following options:

    o   **None**: This is the default setting.
    o   **Zynx**: If you select this option, the **Choose Evidence** dialog box will open, allowing you to construct the path for the evidence by selecting the product, module, and evidence you want to link to.
    o   **Custom**: If you select Custom, type the URL in the box.

6. Populate one of the following fields to name the Section:

    o   **Catalog**: Click the **Browse** button to open the AuthorSpace Catalog to search the Custom catalog, Zynx catalog, or the Zynx + Custom catalog. The term you select from the catalog will populate the **Catalog field**. This is the name of the Problem Section that will appear in the plan of care.
    o   To clear the **Catalog** field, click the **Clear** link.
    o   **Override**: If you wish to change the name of the Problem Section to something other than what appears in the **Catalog** field (without changing meaning), type free text in the **Override** text box. This is the name that will be reflected in the plan of care.

Text in the **Override** field is free text and is not recommended for plan of care integration. In general, you should always refer to your integration manual for instructions on how to optimally build for integration.

7. The **Additional Info** field is free text; type the detail that will be appended to the name (catalog term or override) in the displayed plan of care.
8. Optional: The **Comment** text box can be used to add free text comments. If an item has comments, the 🗩 icon will appear next to the item in the Viewer and Editor. Users can hover over the icon to display the comments.
9. Click the **Save** button. (To minimize the Workspace Editor, click the **Save & Hide** button.)

To add a performance measure to the Activity, select the **Performance Measures** tab from the Workspace Editor to view a list of available performance measures. Select the desired performance measure(s) from the list and then click the **Save** or **Save & Hide** button to close the window.
Click the **Reset** button at any time to clear any selected items.
The **Performance Measures** icon (🏅) will appear next to the Activity in the plan of care.

You can add the following items for an Activity by clicking the arrow to the right of the **Edit** button and then clicking **Insert**, or pressing CTRL+I:

▪   Activity Detail. See Adding an Activity Detail to a Plan of Care.
▪   Outcome. See Adding an Outcome to a Plan of Care.
▪   Reminder. See Adding a Reminder to a Plan of Care.

Adding an Outcome to a Plan of Care

You can add an Outcome to a Goal. To add an Outcome, complete the following steps:

1. From a Goal in the plan of care, click the arrow to the right of the **Edit** button and select Insert, or press CTRL+I.
2. Select **Outcome** in the Workspace Editor.
3. From the **Print/Export** options, you may select **Print Only** or **Export Only** (the default is **Both**). In Print View, items marked as Export Only will not be displayed. In Export View, items marked as Print Only will not be displayed.
4. From the **Pre-Select** options, select any of the following options:

   o **Optional**: If you select this option, the item will not be preselected in the customized plan of care. Its check box will be unchecked. The item can be manually selected in the plan of care.
   o **Default**: If you select this option, the item will be preselected in the customized plan of care. Its check box will appear with a check mark in it.
   o **Required**: If you select this option, the item will appear as a required item in the customized plan of care.

5. From the **Evidence** options, you may select one of the following options:

   o **None**: This is the default setting.
   o **Zynx**: If you select this option, the **Choose Evidence** dialog box will open, allowing you to construct the path for the evidence by selecting the product, module, and evidence you want to link to.
   o **Custom**: If you select Custom, type the URL in the box.

6. Populate one of the following fields to name the Section:

   o **Catalog**: Click the **Browse** button to open the AuthorSpace Catalog to search the Custom catalog, Zynx catalog, or the Zynx + Custom catalog. The term you select from the catalog will populate the **Catalog field**. This is the name of the Problem Section that will appear in the plan of care.
   o To clear the **Catalog** field, click the **Clear** link.
   o **Override**: If you wish to change the name of the Problem Section to something other than what appears in the **Catalog** field (without changing meaning), type free text in the **Override** text box. This is the name that will be reflected in the plan of care.

Text in the **Override** field is free text and is not recommended for plan of care integration. In general, you should always refer to your integration manual for instructions on how to optimally build for integration.

7. The **Additional Info** field is free text; type the detail that will be appended to the name (catalog term or override) in the displayed plan of care.
8. Optional: The **Comment** text box can be used to add free text comments. If an item has comments, the 🗩 icon will appear next to the item in the Viewer and Editor. Users can hover over the icon to display the comments.
9. Click the **Save** button. (To minimize the Workspace Editor, click the **Save & Hide** button.)

To add a performance measure to the Outcome, select the **Performance Measures** tab from the Workspace Editor to view a list of available performance measures. Select the desired performance measure(s) from the list and then click the **Save** or **Save & Hide** button to close the window.

Click the **Reset** button at any time to clear any selected items.
The **Performance Measures** icon (🏅) will appear next to the Outcome in the order set.

You can add the following items to an Outcome by clicking the arrow to the right of the **Edit** button and then clicking **Inse**rt:

- Activity. See Adding an Activity to a Plan of Care.
- Reminder. See Adding a Reminder to a Plan of Care.

Adding a Reminder to a Plan of Care
You can add Reminders to Problems, Sections, Goals, Outcomes, and Activities. To add a Reminder, complete the following steps:

1. From an item in the Content Editor, click the arrow to the right of the **Edit** button and select **Insert**, or press CTRL+I.
2. Select **Reminder** in the Workspace Editor.
3. From the **Print/Export** options, you may select **Print Only** or **Export Only** (the default is **Both**). In Print View, items marked as Export Only will not be displayed. In Export View, items marked as Print Only will not be displayed.
4. From the **Evidence** options, you may select one of the following options:

   o **None**: This is the default setting.
   o **Zynx**: If you select this option, the **Choose Evidence** dialog box will open, allowing you to construct the path for the evidence by selecting the product, module, and evidence you want to link to.
   o **Custom**: If you select Custom, type the URL in the box.

5. The **Text** box is free text; type the text you want displayed in the plan of care.
6. Optional: The **Comment** text box can be used to add free text comments. If an item has comments, the 💬 icon will appear next to the item in the Viewer and Editor. Users can hover over the icon to display the comments.
7. Click the **Save** button. (To minimize the Workspace Editor, click the **Save & Hide** button.)

To add a performance measure to the reminder, select the **Performance Measures** tab from the Workspace Editor to view a list of available performance measures. Select the desired performancemeasure(s) from the list and then click the **Save** or **Save & Hide** button to close the window. Click the **Reset** button at any time to clear any selected items.
The **Performance** Measures icon (🏅) will appear next to the Reminder in the plan of care.

Adding an Activity Detail to a Plan of Care
You can add an Activity Detail to an Activity. To add an Activity Detail, complete the following steps:

1. From an Activity, click the arrow to the right of the **Edit** button and then click **Insert** to open the Workspace Editor, or press CTRL+I.
2. Select Activity Detail in the Workspace Editor.
3. From the **Print/Export** options, you may select **Print Only** or **Export Only** (the default is **Both**). In Print View, items marked as Export Only will not be displayed. In Export View, items marked as Print Only will not be displayed.

4. From the **Pre-Select** options, select any of the following options:

   o **Optional**: If you select this option, the item will not be preselected in the customized plan of care. Its check box will be unchecked. The item can be manually selected in the plan of care.
   o **Default**: If you select this option, the item will be preselected in the customized plan of care. Its check box will appear with a check mark in it.
   o **Required**: If you select this option, the item will appear as a required item in the customized plan of care.

5. From the **Evidence** options, you may select one of the following options:

   o **None**: This is the default setting
   o **Zynx**: If you select this option, the **Choose Evidence** dialog box will open, allowing you to construct the path for the evidence by selecting the product, module, and evidence you want to link to.
   o **Custom**: If you select Custom, type the URL in the box.

6. Populate one of the following fields to name the Section:

   o **Catalog**: Click the **Browse** button to open the AuthorSpace Catalog to search the Custom catalog, Zynx catalog, or the Zynx + Custom catalog. The term you select from the catalog will populate the **Catalog field**. This is the name of the Problem Section that will appear in the plan of care. To clear the **Catalog** field, click the **Clear** link.
   o **Override**: If you wish to change the name of the Problem Section to something other than what appears in the **Catalog** field (without changing meaning), type free text in the **Override** text box. This is the name that will be reflected in the plan of care.

Text in the **Override** field is free text and is not recommended for plan of care integration. In general, you should always refer to your integration manual for instructions on how to optimally build for integration.

7. The **Additional Info** field is free text; type the detail that will be appended to the name (catalog term or override) in the displayed plan of care.
8. Optional: The **Comment** text box can be used to add free text comments. If an item has comments, the ▤ icon will appear next to the item in the Viewer and Editor. Users can hover over the icon to display the comments.
9. Click the **Save** button. (To minimize the Workspace Editor, click the **Save & Hide** button.)

Removing Items from a Plan of Care
To remove items from a plan of care, complete the following steps:

1. For the item you wish to delete, click the arrow to the right of the **Edit** button and select **Delete**, or select the item and press CTRL+D.
2. To restore the deleted item, click **Undo** Delete from the **Commands Menu**.

There is no limit to the number of actions you can undo prior to checking the order set in. If you try to delete items marked with the **Performance Measures** icon, a message box appears indicating that you are about to delete Performance Measure items and asks whether you want to proceed with the delete.
If you delete the section level (parent), all items within that section (children) are deleted as well.

You can also delete sections from the **Section Control Menu**. Hover over the section you wish to delete and

then click the ![x] . You can also flag items for deletion. See Flagging Items in a Plan of Care.

Flagging Items in a Plan of Care
You can flag items for deletion without removing them from view right away. Click the **Flag** icon (![flag])
to flag an item and any of its children. When you are ready to delete flagged items, select the **Delete
Flagged** button at the bottom of the screen.

To unflag an item, click the previously selected **Flag** icon (![flag]) next to the item. Unflag all flagged items by
clicking on the **Unflag All** button at the bottom of the screen.

Modifying Items in a Plan of Care
To modify items in plan of care, complete the following steps:

1. For an item, click the **Edit** button, click the arrow to the right of the **Edit** button and select **Edit**, or
   press CTRL+E to open the Workspace Editor.
2. Click in any field to modify it.
3. Click the **Save** button. (To close the Workspace Editor, click the **Save & Hide** button.)

To change a catalog item, click the **Browse Catalog** link.

See Adding a Problem to a Plan of Care; Adding a Section to a Plan of Care; Adding an Activity to a Plan of
Care; Adding an Outcome to a Plan of Care; Adding an Activity Detail to a Plan of Care; Adding a Reminder
to a Plan of Care for information on each workspace description.

Adding Notes and Build Notes to a Plan of Care
You can add Notes or Build Notes to items (but not to details) within a plan of care. Build Notes are for
internal use and pertain to the integration of the plan of care into your hospital's information system. To
add Notes or Build Notes to an item, complete the following steps:

1. For an item, click the **Edit** button, click the arrow to the right of the **Edit** button and select **Edit**, or
   press CTRL+E to open the Workspace Editor.
2. Select the **Notes** tab in the Workspace Editor.
3. Click the **New** button.
4. Select **Notes** or **Build Notes** from the Type options.
5. Type the Note in the **Note** box (note editor).
6. Click the **Save** link. (To minimize the Workspace Editor, click the **Save & Hide** link.)

The ![note icon] icon will appear next to the item to indicate that a Note is available for display.

Notes can be edited and deleted. When you export content, you can choose to display the Build Notes in
the export file. See Exporting Plans of Care.

Editing Notes and Build Notes
To edit existing Notes or Build Notes for an order item or Section, complete the following step:

1. For an item or Section, click the **Edit** button, click the arrow to the right of the **Edit** button and
   select **Edit**, or press CTRL+E to open the Workspace Editor.
2. Select the **Notes** tab in the Workspace Editor.
3. If the note is not displayed, select the appropriate type from the Show options.
4. Select the **Note** or **Build Note** and click the **Edit** button.

5. Edit the Note in the **Note** box (note editor).
6. Click the **Save** link. (To minimize the Workspace Editor, click the **Save & Hide** link.)

Viewing Notes and Build Notes in a Plan of Care

The 📒 icon appears next to items to indicate that a **Note** is available for display. In the Editor, open the Workspace Editor for the item, select the **Notes** tab, and then select the type of notes you wish to display (Notes, Build Notes, or Both). In the Viewer, click the 📒 icon to display the information in a new window.

By default, the **Notes** tab opens with all Notes and Build Notes displayed. To view only Notes, select the **Notes** option. To view only build Notes, select the **Build Notes** option.

Deleting Notes and Build Notes from a Plan of Care

The 📒 icon appears next to items to indicate that a **Note** is available for display. To delete Notes or Build Notes from an item, complete the following steps:

1. For an item, click the **Edit** button, click the arrow to the right of the **Edit** button and select **Edit**, or press CTRL+E to open the Workspace Editor.
2. In the Workspace Editor, select the **Notes** tab.
3. Select the **Note** to delete.
4. Click the **Delete** button. Click **Yes** to confirm when prompted.

Adding Tasks to a Plan of Care

You can add Tasks to items (but not item details) within a plan of care and assign them to other users to complete. To assign a task to a person, that person must have a valid e-mail address in AuthorSpace. To add Tasks to an item, complete the following steps:

1. For an item, click the **Edit** button, click the arrow to the right of the **Edit** button and select **Edit**, or press CTRL+E to open the Workspace Editor.
2. In the Workspace Editor, select the **Tasks** tab.
3. Click the **New** button.
4. Type the task in the **Subject** box.
5. To assign the **Task** to the appropriate user, select a name from the **To** drop-down list at the bottom of the screen. You can assign multiple users to the same task.
6. Click the **Save** link. (To minimize the Workspace Editor, click the **Save & Hide** link.)

The 📝 icon will appear next to the appropriate items, indicating that there are associated Tasks.

Viewing Tasks for a Plan of Care

To view **Tasks** 📝 for an item, complete the following steps:

1. For an item, click the **Edit** button, click the arrow to the right of the **Edit** button and select **Edit**, or press CTRL+E to open the Workspace Editor.
2. In the Workspace Editor, select the Tasks Tab. Tasks appear on the left side of the tab.

Completing Tasks for a Plan of Care

To mark a **Task** 📝 as complete, perform the following steps:

1. For an item, click the **Edit** button, click the arrow to the right of the **Edit** button and select **Edit**, or press CTRL+E to open the Workspace Editor.
2. In the Workspace Editor, select the Tasks tab.
3. Select the task you would like to complete, click **Edit**, and change the Status in the drop-down list

to **Complete**.
4. Click the **Save** link. The Task will be marked as complete. (To minimize the Workspace Editor, click the **Save and Hide** link.)

The [icon] icon will appear next to items or Sections, indicating that outstanding Tasks have been completed and Notes are still attached.

Deleting Tasks from a Plan of Care
To delete a Task [icon] perform the following steps:

1. For an item, click the **Edit** button, click the arrow to the right of the **Edit** button and select **Edit**, or press CTRL+E to open the Workspace Editor.
2. In the Workspace Editor, select the **Tasks** tab.
3. Select the **Task** to delete.
4. Click the **Delete** button.

Editing Tasks in a Plan of Care
To edit a Task [icon] perform the following steps:

1. For an item, click the **Edit** button, click the arrow to the right of the **Edit** button and select **Edit**, or press CTRL+E to open the Workspace Editor.
2. In the Workspace Editor, select the **Tasks** tab.
3. Select a **Task** and click the **Edit** button. Make the necessary edits and then click the **Save** link. (To minimize the Workspace Editor, click the **Save & Hide** link.)

Duplicating Plans of Care

You can duplicate any existing plan of care. To duplicate a plan of care, complete the following steps:

1. Select a plan of care from the content list and click the **Duplicate** link. The **Duplicate** dialog box displays.
2. Type a name for the plan of care in the **Content Name** text box. "Copy of" and the name of the plan of care that you are copying appears by default.
3. From the **Select Module** drop-down list, select a module.
4. In the **destination folder** area, navigate to and select the folder where you want to place the duplicate copy of the plan of care, on the left.
5. Optional: Select the **Open in editor after duplicating** check box to open the duplicated plan of care in the Editor after you create it.
6. Click the **Duplicate** button to close the dialog box.

Printing Plans of Care

You can print a plan of care from either the Editor, Viewer, or content list.

- From an open plan of care displayed in the Editor, click **Print View** from the **Commands Menu**. This will take you to the view mode, where you can print.
- From an open plan of care displayed in the Viewer, click **Print** from the **Commands Menu**.
- From the content list, select the plan of care and click the **Print** link to open the **Print** dialog box.

In the **Print** dialog box, select a print format for a plan of care:

1. Select one of the following formats for saving and printing your file in either PDF, RTF, or HTML:

- o **Review Report**: Lists plan of care header information and all the reviews for the order set in a text file. Provides a way to see all the reviews for an order set without opening the Content Manager and scrolling through all the order set review notes. Can be opened in WordPad or Notepad.
- o **Checklist**: Prints just the activity details that support the following Activities: assessments, communication, patient education, treatment and procedures, and evaluations. Used as an education checklist, patient teaching tool, staff teaching tool, patient instructions, or to standardize care.
- o **Plan of Care**: Prints the plan of care with the following items: Problems, Expected Outcomes, Activities (which includes assessments, communication, diagnostics, medications, education, treatments and procedures, and evaluation), Reminders, and may include activity details. Used as a blueprint to direct patient care for the interdisciplinary team.
- o **Task List**: Prints a task list with categories or Sections (which include assessments or diagnostics) and Activities or Tasks (which includes pulmonary assessment or information about when to call the provider). Used as a task list, care pathway, or to standardize care for the interdisciplinary team.

You can also choose the **Standard XLS V.1, XLS** format. This format saves the plan of care in a spreadsheet that can be opened in Excel. Any internal notes or tasks associated with an item or Section are also saved to the spreadsheet.

2. If you selected Checklist, Plan of Care, or XLS in step 1, the **Print Details** check box appears. Select this option if you wish to include activity details in the format you selected.
3. Click the **Go** button. You can save the file to print later, open and print it, or cancel the action.

If you have trouble printing the plan of care in the format you selected, you may have to indicate in your browser settings that Zynx.com is a trusted site. See the Adding Zynx.com to Trusted Site List section in Optimal Settings for Internet Explorer for information on how to add Zynx.com as a trusted site.

Exporting Plans of Care

Users can build custom plans of care and export them in formats that can be downloaded to other systems. Only users with export permission can export plans of care. To select the export format, complete the following steps:

1. To open the **Export** dialog box, select a plan of care from the content list and click the **Export** link.
2. Choose the XML export format. The format choices that are available are configured in the Environment Manager's Integration Tab.
3. Click the **Go** button. You can save the file to export later, open and export it, or cancel the action.

Build Report Button

Click the **Build Report** button in the **Export** dialog box to create a report that contains relevant details about the build. The report is created in a format that assists users who are responsible for integrating the order set into your hospital's information platform.

Deleting Plans of Care

Only administrators can delete a plan of care. If you are not an administrator, you will not see the **Delete** link in the content list. To delete a plan of care, complete the following step:

- ▪ Select a plan of care from the content list and click the **Delete** link. An alert box appears, asking you

to verify that you want to delete the plan of care.

Versioning Plans of Care

Released plans of care have version numbers. Version numbers are assigned in the following manner:

- If you create a new plan of care and then release it, that released plan of care will be assigned as version 1.
- If you select a released/retired plan of care to edit, a draft of that plan of care is created. Once you release that draft, the version number increases by one. The line of versioning continues because a revised draft of the plan of care has been released.
- If you create a duplicate of a released/retired plan of care, a new instance of the plan of care is created for. Once you release that draft, it is released as version 1. The line of versioning starts over because a new instance of the plan of care has been released.

Working with Vocabularies

The Zynx content is expressed in an internal vocabulary that is developed and maintained by Zynx personnel. The collection of this internal vocabulary is referred to as the Zynx Catalog.

Since hospitals and vendors often develop and maintain their own external vocabulary, they need a way to link their external vocabularies to the equivalent Zynx term so that they can create custom content using their vocabulary. The **Vocabularies** link provides this functionality. You can add or import your external vocabulary and then link the Zynx Catalog term to the equivalent term in the external vocabulary. The screens that users can view and navigate depend on assigned user permissions.

Vocabulary Manager Home Screen

Click **Control Panel** on the AuthorSpace main screen and then click **Vocabularies** to open the **Vocabulary Manager** Home screen.

The **Vocabulary Manager Home** screen lists information about the external vocabularies that are available for the environment. For information on adding vocabularies, see Adding Local Vocabularies. The **Vocabulary Manager Home** screen provides the following information:

- **Vocabulary Name**: The name of the external vocabulary, such as SNOMED.
- **Type**: The type of external vocabulary, such as standard vocabulary, vendor, or local vocabulary.
- **Term Types**: The types of vocabulary terms provided by the external vocabulary.

From the **Vocabulary Manager Home** screen, you can perform the following functions:

- **Add Local Vocab/Add Vendor Vocab**: Click these links to add new external vocabularies.
- **Manage Aliases**: The manage alias functionality allows you to use existing local vocabularies to override Zynx terms in content that appears in AuthorSpace as well as in content that is printed/exported. See Managing Aliases.
- **View external vocabulary details**: Click any available Vocabulary Name that is shown as a hyperlink to go to the Vocabulary Details screen to view details for that vocabulary as well as access additional functionality. For information on adding an external vocabulary so that it is available from the **Vocabulary Manager Home** screen, see Adding Local Vocabularies.

Adding Local Vocabularies

To add local vocabularies, complete the following steps:

1. From the **Vocabulary Manager Home** screen, click the **Add Local Vocab** link to open the **Add Local Vocabulary** screen.
2. Type the vocabulary name in the **Vocabulary Name** text box.
3. If the vocabulary has its own external ID, select the **Has IDs** check box. If vocabulary does not have external IDs, clear the **Has IDs** check box. The **Has IDs** check box is enabled by default.
4. In the **Description** text box, type a description of the vocabulary name.
5. In the **Environment Specific Notes** box, add notes that are specific to using the vocabulary within your environment.
6. In the **General Notes** box, add any applicable notes.
7. Click the **Save** button to add your vocabulary to the **Vocabulary Manager Home** screen. The new vocabulary will also be available for export when you configure exports with the Environment Manager's Integration Tab.

After you add a vocabulary, you can add or import vocabulary terms for the external vocabulary. See Adding Vocabulary Terms or Importing Terms.

Adding/Removing Vendor Vocabularies

Vendor vocabularies must be imported into the Zynx database before they can be added or modified. To start the import process, submit a copy of the vocabulary to be added or modified to your client manager. To add/remove vendor vocabularies, complete the following steps:

1. From the **Vocabulary Manager** Home screen, click the **Add Vendor Vocab** link to open the **Add Vendor Vocabulary** screen. The screen shows 2 list boxes labeled **Available Vendor Vocabularies** and **Added Vendor Vocabularies**.

    o   The **Available Vendor Vocabularies** list box shows all available vocabularies.
    o   The **Added Vendor Vocabularies** list box shows the vocabularies that have been added to the environment.

2. Populate the **Added Vendor Vocabularies** list box with the vocabularies your environment will use.

    o   To add a vocabulary to the environment, select a name in the **Available Vendor Vocabularies** list box and click the **Add** link.

3. To remove a vocabulary from the environment, select a name in the **Added Vendor Vocabularies** list box and click the **Remove** link. The name appears in the **Available Vendor Vocabularies** list box.

Managing Aliases

For external vocabulary terms that have been previously linked to Zynx terms, you can choose to display the description of the external vocabulary term instead of the actual Zynx term description wherever that Zynx term appears in AuthorSpace. This functionality is known as creating an alias for Zynx terms.

Click the **Manage Aliases** link to open the **Manage Aliases - Select Vocabularies to "Alias"** screen, where you specify existing vocabularies as aliases. To specify aliases, complete the following steps:

1. Populate the **Alias Vocabularies** list box with the external vocabularies you wish to use.

    o   To add vocabularies to the **Alias Vocabularies** list box, click one or more vocabularies from the **Environment Vocabularies** list box and then click the **Add** link.
    o   To remove vocabularies from the **Alias Vocabularies** list box, click one or more vocabularies from the **Alias Vocabularies** list box and click the **Remove** link.

2. Click the **Next** button to open the **Manage Aliases - Order Vocabularies** screen. The **Order Vocabularies** screen displays the list of vocabularies from the **Alias Vocabularies** list box. If the same Zynx term is mapped in more than one vocabulary in this list, you must establish the order in which the vocabularies will be used. Click a vocabulary and then click the up or down arrow button to the right of the list to move it up or down in the list as desired.
3. Click the **Finish** button.

The next time you view or edit content containing an alias, you will see that the alias has replaced the Zynx description.

Viewing Vocabulary Details

Use the **Vocabulary Details** screen to retrieve a list of terms for a selected local vocabulary. You can view the Term ID, Description, Term Type, and Status for each retrieved vocabulary term, if linked. The PIVOT ID is available for view after clicking on **Edit** for the vocabulary term. To retrieve a list of vocabulary terms, complete the following steps:

1. From the **Vocabulary Manager Home** screen, click any hyperlinked local vocabulary to go to the **Vocabulary Details** screen for the selected vocabulary. Vendor vocabularies may appear on the **Vocabulary Manager Home** screen as well, but they do not appear hyperlinked. Only local vocabularies appear hyperlinked and can be selected. The terms for the selected vocabulary appear in the Vocabulary Items section at the bottom of the screen.
2. To search for a specific term in the search area at the top, type the description of the vocabulary term in the **Name** field. Type the full name or one or several characters in the description.
3. Select the vocabulary type, such as Medications, Diet, or Laboratory, from the **Type** drop-down list.
4. Select the status from the **Status** drop-down list. Status shows whether the term is active or hidden.
5. Indicate whether you want to retrieve terms that have been linked to Zynx terms.

   o Select the **Unlinked Only** check box to retrieve vocabulary terms that have not been linked to Zynx vocabulary terms.
   o Clear the **Unlinked Only** check box to retrieve both linked and unlinked terms. In the filter result list, the presence of a PIVOT ID indicates that the term has been linked to a Zynx vocabulary term.

6. Click the **Search** button. The filtered list appears in the Vocabulary Items section. The description, term type, and status are displayed for each term. If the vocabulary was imported with its own external ID, the term ID is also displayed. The term ID is unique to the vocabulary term and can be a negative number.

In the Vocabulary Items area, click the ▶ to display the associated Catalog Term ID and description. Only external vocabulary terms linked to Zynx Catalog or Custom Catalog terms have Catalog Term IDs. Catalog Term IDs are assigned automatically by the system when you link external vocabulary terms to Catalog terms in the **Link Catalog Terms** screen. If a vocabulary term is linked to more than one Catalog term, multiple Catalog Term IDs will be displayed.

The Term Count at the bottom of the screen displays the total number of filter results. Use the **First Page**, **Previous Page**, **Next Page**, and **Last Page** links to navigate the list.

See the following sections for information on other tasks that can be performed from the **Vocabulary Details** screen:

- Managing Vocabularies
- Adding Vocabulary Terms
- Importing Terms
- Linking Catalog Terms
- Modifying Vocabulary Terms
- Generating a Vocabulary Report

Managing Vocabularies

Only local vocabularies can be managed. You can update existing external vocabularies. To modify the name, description, or notes for a vocabulary, complete the following steps:

1. From the **Vocabulary Manager Home** screen, click any hyperlinked Vocabulary Name to go to the **Vocabulary Details** screen for the selected vocabulary.
2. Click the **Manage Vocab** link on the **Vocabulary Details** screen to open the **Manage Local Vocabulary** screen.
3. Modify the vocabulary name in the **Vocabulary Name** text box.
4. If the vocabulary was imported with its own external IDs, select the **Has IDs** check box. If vocabulary was not imported with external IDs, clear the **Has IDs** check box. The **Has IDs** check box is enabled by default.
5. In the **Description** text box, type a description of the vocabulary name.
6. In the **Environment Specific Notes** box, add or modify notes that are specific to using the vocabulary within your environment.
7. In the **General Notes** box, add or modify any applicable notes.
8. Click the **Save** button to modify your vocabulary.

Adding Vocabulary Terms

To add a vocabulary term, complete the following steps:

1. From the **Vocabulary Manager** Home screen, click any hyperlinked Vocabulary Name to go to the **Vocabulary Details** screen for the selected vocabulary.
2. On the **Vocabulary Details** screen, click the **Add Term** link.
3. Type the identifier in the **Term ID** text box.
4. Type the description text for the identifier in the **Description** text box.
5. Select the vocabulary type from the **Term Type** drop-down list.
6. Select the status from the **Status** drop-down list.
7. Click the **Save** button. If the term was added successfully, the term will appear in the **Vocabulary Items** list on the **Vocabulary Details** screen.

Click the **Edit** link to the right of the term in the **Vocabulary Items** list on the **Vocabulary Details** screen to open the **Update Vocabulary Term** screen. See Modifying Vocabulary Terms.

Importing Terms

Use the **Vocabulary Import** screen to import a vocabulary from either a delimited or fixed input file. To import an external vocabulary, complete the following steps:

1. From the **Vocabulary Manager Home** screen, click any hyperlinked Vocabulary Name to go to the **Vocabulary Details** screen for the selected vocabulary.
2. Click the **Import Terms** link on the **Vocabulary Details** screen to open the **Vocabulary Terms Import** screen.
3. In the File Format area, choose whether the input file is **Delimited**, or **Fixed**. If you select **Delimited**, provide the following information:

   o **Delimiter**: Choose whether the delimiter is a **Tab**, **Space**, or **Other**. If you select **Other**, specify the delimiter. Other can be the pipe character (|), a comma, or a semi-colon. Fields that use delimiters or text qualifiers as text must be enclosed in text qualifiers so that those characters will be imported as text.
   o **Text Qualifier**: If the term description being imported is designated by a double quotation mark or single quotation mark in the import file, type the appropriate character here so that the qualifier character is not imported as part of the term description. Leave this text box blank if the import file does not contain qualifiers.
   o **Term External ID Field #:** Type a numeric value to designate the column in the import file that contains the IDs to use. If you are importing from an Excel spreadsheet and columns are assigned A, B, C, and so on, type the numeric value equivalent in the **ID Field #.** This text box only appears if you selected the Has IDs check box in the Add Local Vocabularies screen. If the input file does not contain IDs, the system will generate its own IDs.
   o **Term Name Field #**: Type a numeric value to designate the column in the import file that contains the description. If you are importing from an Excel spreadsheet and columns are assigned A, B, C, and so on, type the numeric value equivalent in the **Description Field #.**
   o **Select Term Type**: This field only appears if you do not select the **Input file contains multiple types** check box. Select the type from the drop-down list.
   o **Term Type Field #:** This field only appears if you select the **Import Data contains Term Types** check box. Type a numeric value to designate which column in the import file to use. If you are importing from an Excel spreadsheet and columns are assigned A, B, C, and so on, type the numeric value equivalent in the **Type Field #.**

   If you select **Fixed**, provide the following information:

   o **Term ID Starting Position**: Type a numeric value to designate the starting position of the ID column in the import file. If you are importing from an Excel spreadsheet and columns are assigned A, B, C, and so on, type the numeric value equivalent in the **Term ID Starting Position**. This text box only appears if you selected the **Has IDs** check box in the Add Local Vocabularies screen

- o **Term ID Width**: Type a numeric value to designate the width of the ID column in the import file. This text box only appears if you selected the **Has IDs** check box in the **Add Local Vocabularies** screen.
- o **Name Starting Position**: Type a numeric value to designate the starting position of the Description column in the import file. If you are importing from an Excel spreadsheet and columns are assigned A, B, C, and so on, type the numeric value equivalent in the **Name Starting Position**.
- o **Name Width**: Type a numeric value to designate the width of the Description column in the import file.
- o **Select Term Type**: This field only appears if you do not select the **Input file contains multiple types** check box. Select the type from the drop-down list.
- o **Term Type Starting Position**: This field only appears if you select the **Import Data contains Term Types** check box. Type a numeric value to designate the starting position of the Type column in the import file. If you are importing from an Excel spreadsheet and columns are assigned A, B, C, and so on, type the numeric value equivalent in the **Term Type Starting Position.**
- o **Term Type Width**: This field only appears if you select Import Data contains Term Types check box. Type a numeric value to designate the width of the Type column in the import file.

4. Indicate the vocabulary type that the input file contains.

- o To import multiple vocabulary types, select the **Import Data contains Term Types** check box. If you are importing external vocabulary term types, you can associate external vocabulary term types with Zynx standard term types in the Term Type Mapping screen.
- o To import one vocabulary term type, select the vocabulary term type from the **Select Term Type** drop-down list.

5. Click the **Browse** link to navigate to the file to import.
6. Click the **Import** button. A dialog box appears indicating the number of records read from the input file, the number of rows added and updated, and the number of errors. If any errors are indicated, click the **Errors** button to see a log of each error. The list of errors can be viewed until you import another file.

Word files saved in Rich Text Format (RTF) may contain special, non-keyboard characters. Open these types of files in Notepad before importing any vocabularies to make sure there are no special characters in the file; otherwise, you will receive an XML import error message.

After you import the vocabulary, the **Vocabulary Details** screen is populated with the vocabulary items from the file.

Linking Catalog Terms

After a local vocabulary is imported, use the **Link Catalog** Terms screen to link the vocabulary terms to catalog terms (Zynx terms or custom terms). Only local vocabularies can be linked to catalog terms. Vendor vocabularies cannot be linked to Zynx terms. The following is true for export files:

- One vocabulary term can be linked to multiple catalog terms.
- One catalog term can be linked to only one vocabulary term.

From the **Vocabulary Details** screen, you can link several vocabulary terms at a time by using the **Link Catalog Terms** link, or you can link one term at time by using the **Map** link. See Linking Several Vocabulary Terms at a Time and Linking One Vocabulary Term at a Time.

Linking Several Vocabulary Terms at a Time
To link vocabulary terms to catalog terms, complete the following steps:

1. From the **Vocabulary Manager Home** screen, click any hyperlinked local vocabulary to go to the **Vocabulary Details** screen for the selected vocabulary.
2. Click the **Link Catalog Terms** link on the **Vocabulary Details** screen to open the **Link Catalog Terms** screen. The top part of the screen enables you to search for Zynx, Custom, or Zynx + Custom terms.
3. Populate any of the following fields by selecting the appropriate values from these drop-down lists: Catalog, Content, Category, Type, Term Type, or Status.
4. Type the term in the **Term Name** field. Use of wildcard characters is not supported. To perform a search, you must either select a Term Type or type at least 2 characters.
5. Click the **Search** button. The system returns catalog terms using the criteria that you specify. The results list shows the term, PIVOT ID, primary term type, catalog, linked term, Term ID, and status. By default, 50 terms appear per page. Use vertical scroll bars to view all terms if they are not visible on the list. Use the page links below the results list to display additional results.
6. In the Vocabulary Term(s) area, select the term type from the **Type** drop-down list.
7. Select the term's status from the **Status** drop-down list.
8. Type any text or characters that are part of the term name in the **Search** box.
9. Select the **Unlinked Only** check box to retrieve terms that are not linked to Zynx terms. If this check box is not selected, you will retrieve terms that are both linked and unlinked.
10. Click the **Search** button. The results list shows the description, term ID, type, and status. Use the **First Page**, **Previous Page**, **Next Page**, and **Last Page** links to view the results. Use vertical scroll bars to view all terms if they are not visible on the list.
11. To link the vocabulary terms to the catalog term, click the vocabulary term, click the catalog term, and then click **Link**.

    o One vocabulary term can be linked to multiple catalog terms, so repeat this step if necessary
    o One catalog term can be linked to one vocabulary term. If a catalog term is already linked to a vocabulary term, you will receive a message to this effect.

To unlink an item, select both terms and click **Unlink** in the upper right side of the screen.

Linking One Vocabulary Term at a Time

To link just one vocabulary term at a time, click the **Map** link next to a term in the **Vocabulary Items** list on the **Vocabulary Details** screen. The **Link Catalog Terms** screen opens with the selected term identified in the top portion of the screen. If the vocabulary term is linked, the term to which it is linked appears in the **Linked Catalog Term(s)** box. Complete the following steps:

1. In the Catalog Term(s) to Link area at the bottom of the screen, populate any of the following fields by selecting the appropriate values from these drop-down lists: Catalog, Content, Category, Type, Term Type, or Status. You can search for Zynx, Custom, or Zynx + Custom terms.
2. Type the term in the **Term Name** field. Use of wildcard characters is not supported. To perform a search, you must either select a Term Type or type at least 2 characters.
3. Click the **Search** button. The system returns catalog terms using the criteria that you specify. The results list shows the term, PIVOT ID, primary term type, linked term, Term ID, and status. By default, 50 terms appear per page. Use the vertical scroll bar to view all terms if they are not visible on the list. Use the page links below the results list to display additional results.
4. Click the catalog term to which you wish to link and then click **Link**.

To unlink an item, select both terms and click **Unlink**.

Modifying Vocabulary Terms

To modify a vocabulary term, complete the following steps:

1. From the **Vocabulary Manager Home** screen, click any hyperlinked vocabulary to go to the **Vocabulary Details** screen for the selected vocabulary.
2. On the **Vocabulary Details** screen, select a term from the Vocabulary Items list and click the **Edit** link to open the **Update Vocabulary Term** screen.
3. If the vocabulary term was imported with its own external ID, a **Term ID** text box is present. Enter the term's external ID in the Term ID text box.

This text box only appears if you imported the vocabulary with its own external ID by selecting the **Has IDs** check box in the **Add Vocabularies** screen. See Adding Local Vocabularies.

4. Type the description text for the identifier in the **Description** text box.
5. Select the vocabulary type from the **Term Type** drop-down list.
6. Select the status from the **Status** drop-down list.
7. If the vocabulary term is linked to a Zynx term, any linked terms appear in the Linked Zynx Term(s) area. View or add link notes in the Link Note(s) area at the bottom of the screen.
8. Click the **Save** button. If the term was added successfully, the term will appear in the **Vocabulary Items** list on the **Vocabulary Details** screen.

When you select a term to modify from the **Vocabulary Details** screen, the fields on the **Modify Term** screen are automatically populated with the appropriate information. Change any of the details (Description, Term Type, Status) except the Term ID, and then click the **Save** button. You can also delete a vocabulary term by clicking **Delete**.

Generating a Vocabulary Report

You can generate a report that shows how the terms in your local vocabulary are linked to terms in the Zynx catalog. To generate this report, complete the following steps:

1. From the **Vocabulary Manager Home** screen, click any hyperlinked local Vocabulary Names to go to the **Vocabulary Details** screen. To retrieve a list of vocabulary terms and associated details in the bottom half of the screen, see Viewing Vocabulary Details.
2. To generate a report displaying details about the vocabulary items that appear in the bottom half of the screen, click the **Report** button. A dialog box appears asking whether you want to open or save the file.
3. To open the report, click the **Open** button. Otherwise click the **Save** button to save it and open it later.

The report opens as an Excel spreadsheet, displaying details such as the external vocabulary term, term type, external ID, and status. If the external vocabulary term is linked to a Zynx term, the Zynx description, pivot ID, and status are also displayed.

Glossary

activity
A specific action that the interdisciplinary care team carries out to address a patient problem. Within a ZynxCare plan of care, each problem is associated with one or more activities that are grouped under the intervention section. Activities are organized into the following categories: Assessments, Communication, Education, and Treatments and Procedures.

assessments and diagnostics
Activities within a plan of care that evaluate, assess, and determine patient condition, knowledge, and medication use, as well as patient, caregiver, and family member risk factors, to develop the plan of care.

AuthorSpace
Zynx Health AuthorSpace provides a dynamic authoring environment that enables users to build and export content (such as order sets and plans of care) in formats that can be integrated into various hospital information systems.

base team
A base team is a group of users with access to all content. If appropriate permissions have been set, members within the group can release, modify, export, and view the content. By default, all environment users are assigned to a base team.

blue ribbon
A blue-ribbon icon (🏅) signifies that the associated topic or item addresses a performance measure defined by a national organization (e.g., Centers for Medicare & Medicaid Services, The Joint Commission).

communication
Activities within a plan of care that trigger or enhance interdisciplinary coordination by identifying providers relative to a given patient problem.

community environment
A community supports the sharing of content across accounts by allowing environments to publish and view content in a common area. All content in a community is View Only but may be duplicated to a local environment.

custom catalog
A collection of terms developed for an environment to use when creating content.

custom content
An order set or plan of care that has been modified for a user's hospital or health system. Users can add, delete, or modify sections or items to create custom content.

education
Activities within a plan of care that teach patients, caregivers, and family members, enabling patients to meet expected outcomes and reach optimal health.

environment

A collection of users who share common system preferences, export options, vocabularies, etc., in AuthorSpace.

environment manager

An Environment Manager has full access to all features of AuthorSpace and has access to Home, Environment, and Vocabularies links on the Control Panel. The Environment Manager can change user passwords, access other Environments, create teams and content folders, and manage milestones, the catalog, integrations, and workspaces (if available in the environment). The Environment Manager can also manage local and vendor vocabularies and allow the user to manage aliases. An Environment Manager has View, Modify, Release, and Export permissions by default, and these permissions cannot be disabled.

environment user

An Environment User only has access to the Home link on the Control Panel page. The Home link allows the Environment User to change his or her password or access other Environments. An Environment User can be assigned View, Modify, Release, or Export permissions by an Environment Manager.

event

A piece of meta-information that can be associated with an order set or plan of care. An event refers to an action (e.g., admission or discharge) to which the order set or plan of care applies.

expected outcome

Measurable patient-centered conditions/states, behaviors, or perceptions in response to interdisciplinary interventions. Expected outcomes can be assessed by the interdisciplinary care team at any point in time and are used to indicate whether a goal has been met or progress has been made in resolving a problem. In a plan of care, each problem has at least one expected outcome grouped under the Goal section.

external file

Refers to an outside document that can be uploaded from a hard disk and stored and accessed within AuthorSpace. Outside documents include clinical documents such as clinical protocols, or administrative information such as project plans and contact lists. You can upload files of any type and store them along with order sets and/or plans of care. These documents can be removed or updated as needed. AuthorSpace does not support printing or exporting of external files regardless of security permissions.

external ID

The alphanumeric code associated with external vocabulary terms or workspace fields. The external ID can be a negative number. The external ID is organization-specific and may be used to clinically identify or catalog content. See term ID.

external vocabulary

Collection of data, concepts, and procedures developed by an environment or organization other than Zynx Health. An external vocabulary can be a standard vocabulary, vendor vocabulary, or local vocabulary. External vocabularies can be imported into Zynx AuthorSpace and mapped to equivalent terms in the Zynx PIVOT catalog. Each term in the external vocabulary has a unique external ID. The ID is assigned and maintained internally within the organization.

forecaster
A tool used to calculate the potential benefits of implementing specific evidence-based aspects of care, both in terms of quality of care and cost-effectiveness, and to model out the impact of these improvements on morbidity, mortality, functional status, and cost.

goal
A subject heading that organizes expected outcomes in a plan of care.

intervention
A subject heading used to organize activities in a plan of care.

linkable
Describes content that can be "virtually inserted" into other content. For example, if version 1 of order set A is marked as "linkable," it can be linked into order sets B and C. If order set A is updated to version 2, its changes will be propagated into order sets B and C as well.

medications
In Zynx evidence and order sets, these are drug names that can be expressed as medication names (consisting of the generic active ingredient or brand name alone) or dispensable products (which consist of the active ingredient or brand name in conjunction with the strength and formulation).

modular order set
Modular order sets allow organizations to employ a building block approach to their order sets. More specifically, the modular approach involves the use of 1 or more condition-specific modular order sets in conjunction with a venue-specific admission modular order set. The condition-specific order set consists primarily of medications and diagnostic tests, whereas the admission order set consists of items that would generally be ordered regardless of the patient's specific conditions (e.g., diet, activity).

order detail
Further description or clarification of key concepts for an activity in a plan of care, a medication order item in an order set, or a non-medication order item in an order set.

order set
A group of interventions that are specific to a condition or procedure and pertain to a venue of care. Zynx Health provides default order sets and allows for customization of order sets to meet hospital or health system requirements. Customized order sets ideally should be developed as a result of careful review of evidence and for creating a meaningful change in patient quality of care, and not driven by Information Technology milestones for meeting deadlines for a CPOE roll-out.

performance measure
Performance metrics that measure process, outcome, efficiency, structure, or patient experience of care. Selected performance measures included in Zynx content are 1) used for public reporting or pay for performance programs or 2) useful for quality improvement programs. These performance measures are developed, adopted, and/or endorsed by the following organizations:

- American Association of Cardiovascular and Pulmonary Rehabilitation
- American College of Cardiology/American Heart Association
- Centers for Medicare & Medicaid Services
  The Joint Commission

performance measure library

A list of national performance measures as defined by various national organizations with a performance-improvement focus. The list shows the national organization, performance measure program, disease/procedure, measure type, and measure venue. For each performance measure, a summary of the measure specifications is provided, as well as URLs to supporting documents on the Web.

PIVOT ID

PIVOT stands for Portable Intermediate Vocabulary of Objective Terms. Any term representing a concept in an order set will have a corresponding PIVOT ID in the Zynx catalog. PIVOT IDs can be mapped to their equivalent concepts in external vocabularies.

plan of care

A plan developed with nursing and ancillary health professionals that identifies the treatment needs, goals, and objectives of a participant (i.e., patient, family, caregiver, group) based on clinical assessments. The plan provides strategies for meeting goals and objectives and for evaluating the participant's progress.

problem

A condition experienced by a patient that can be corrected or ameliorated in a clinical care setting. Problems may be acute or chronic in nature or may represent a functional or organizational risk. Problems may be actual or potential and may span one or more episodes of care. ZynxCare provides the basis for assessing, planning, and evaluating the care of patients with the most common problems that members of an interdisciplinary care team manage.

reason

A piece of meta-information that can be associated with an order set or plan of care. Reason refers to the module (e.g., acute myocardial infarction), procedure (e.g., appendectomy), or symptom (e.g., chest pain) to which the order set or plan of care applies.

reminder

Information included in an order set or plan of care that serves as an evidence-based note to the clinician at the point of care. A reminder is included in the order set or plan of care when the clinical evidence satisfies topic inclusion, but it cannot be directly translated into an order item or plan of care activity. Reminder items are created only for topics that are presented in the evidence. For example, a topic regarding the use of a prediction rule to guide triage decisions for patients with community-acquired pneumonia cannot be translated into an order item, but an order set reminder item can serve as a timely evidence-based reminder to the physician at the point of care.

rules

Sample guidelines available in ZynxOrder that show how evidence can be translated into alerts and reminders within electronic medical record systems. Rules are written for various clinical scenarios that may apply to a single venue of care or multiple venues of care.

section

A category used to organize order items in an order set or plan of care. For example, Zynx Health standard order sets use the following sections: Condition, Vital Signs, Activity, Nursing Orders, Patient/Caregiver Education, Respiratory, Diet, IV Fluids, Medications, Blood Bank, Laboratory, Radiology, Diagnostic Tests, Specialty, Consults, and Noncategorized. Sections may contain subsections and sub-subsections. Each plan of care offered by Zynx Health addresses a specific patient problem. Plans of care include a Goal section (containing Expected Outcomes) and an Intervention section. The Intervention section contains subsections (i.e., Reminders, Activities, Checklist Details).

standard vocabulary

Industry-specific terminology for data, concepts, and procedures that can be imported into Zynx AuthorSpace and contains vocabulary terms that can be mapped to equivalent terms in the Zynx PIVOT catalog.

Starter plan of care

A starter plan of care is an abridged version of a standard Zynx plan of care. Because a starter plan of care has had less commonly used items removed while retaining relevant evidence links and national performance measures, it can be used as a quick-start template to guide organizations toward their own rapid customization efforts.

status

Indicates the state of an order set or plan of care (i.e., Draft, Released, Retired, Review):

- **Draft**: The order set or plan of care has not been released and is currently being modified.
- **Released**: The order set or plan of care has been released. A released item is never deleted.
- **Retired**: The order set or plan of care has been superseded or forcibly retired and should not be used.
- **Review**: The order set or plan of care or linkable content is being reviewed. The order set or plan of care or linkable content can still be edited in Review status.

team

A team is a group of users assigned to content. Depending on user permissions, users within the group can release, modify, view, or export the assigned content.

term ID

A field in AuthorSpace that contains the external ID for an external vocabulary term. This field is only displayed if the external vocabulary was imported with external IDs. See external ID.

treatments and procedures

Activities within a plan of care that deliver care, prevent injury, and perform actions that enable patients to meet expected outcomes and reach optimal health.

venue

A piece of meta-information that can be associated with an order set or plan of care. Venue refers to a clinical location (e.g., ICU, Emergency Department) to which the order set or plan of care applies.

ViewSpace

An environment for reviewing and/or commenting on your organization's order sets and/or plans of care.

ZynxCare

ZynxCare offers knowledge for nurses and allied health professionals (e.g., physical therapists, occupational therapists, respiratory therapists, nutritionists, social workers) in the form of evidence-based synopses linked to customizable plans of care. The content contained in ZynxCare provides the basis for assessing, planning, and evaluating the care of patients with the most common problems that members of the interdisciplinary care team manage.

Zynx Catalog

A collection of healthcare concepts that contains terms for use in order sets (e.g., medications, laboratory tests, consults) and plans of care (e.g., expected outcomes, checklist details).

ZynxEvidence

ZynxEvidence is a comprehensive source for evidence-based research, guidelines, and hospital performance measures. It serves as an in-depth reference source for evidence-based quality improvement and can be used to impact the key drivers of clinical outcomes and costs in your organization.

Zynx Forecasting

Zynx forecasting, available in the ZynxEvidence, and ZynxMeasurement products, is a tool to forecast the impact of evidence-based clinical decision support on clinical outcomes, processes of care, and financial results.

Zynx Forecasting: Default Values

Default values are representative patient statistics that can be used as inputs to the forecasting calculators when actual patient statistics are not available, so that approximate potential benefits due to improvements in the processes of care may be calculated. A set of default values is provided in the Forecasting Calculator sections for most forecasters. The default values are also used as representative inputs in the Sample Calculations.

Zynx Forecasting: Definitions section

The Definitions page provides concise definitions of input and output descriptions; of indications for and contraindications to the recommended intervention; of inclusionary and exclusionary criteria; and of other terms presented in the Forecasting Calculator section. Some definitions also appear in pop-up boxes throughout the forecasting modules.

Zynx Forecasting: Forecasting Abstraction Form

The forecasting abstraction form can be printed and used to collect the data needed as inputs for the Forecasting Calculators.

Zynx Forecasting: Forecasting Calculator section

On the Forecasting Calculator page, the user can forecast quality and cost improvements that his or her organization may realize by implementing the Recommendation. These opportunities are translated into tangible endpoints ("outputs") such as potential number of lives saved, hospitalizations prevented, or costs avoided. On the Forecasting Calculator page, the user can enter his or her organization's data and make forecasting calculations. Zynx Health also provides representative default values to use in place of actual statistics when that data is not readily available. The charting feature allows the healthcare organization to track its progress over time. Simply click the Chart button after calculating. Data accumulated in the charting feature can be viewed in a table format or exported onto an Excel spreadsheet.

Zynx Forecasting: Forecasting Methodology section

The Forecasting Methodology section provides a detailed description of the forecaster selection and review process by describing the modelability of studies; topic selection; selection of supporting studies; literature screening, acquisition, and classification; selection of studies for Supplemental Literature sections; how calculations are generated; how contraindications to medications are defined; the editorial process; and quality control.

Zynx Forecasting: Forecasting Results – All Modules section

The Forecasting Results – All Modules section provides a real-time summary of the most recent calculations made (i.e., the most recent outputs generated) in all modules within a product (i.e., ZynxEvidence, ZynxMeasurement).

Zynx Forecasting: Forecasting Summary section

Each module that contains more than one forecaster includes a Forecasting Summary section (folder) summarizing the output definitions and calculated outputs for all forecasters within the module. The Output Definitions page contains all the output definitions used in the module. The Calculations Summary page shows all forecasting data that have been calculated in the entire module and refreshes in real time whenever a new calculation is performed.

Zynx Forecasting: General Information section

Once you select a Forecasting module, the Scope page in the General Information folder opens by default and describes the included and excluded patient populations for the module. In addition to the Scope page, the General Information folder contains the Forecasting Methodology page and may contain a Definition page. The Definition page, when available, provides a definition for each condition/procedure from national/professional organizations and consensus conferences.

Zynx Forecasting: Recommendation section

The Recommendation page contains a fundamental recommendation for each forecaster. The References section on the Recommendation page links to one or more Evidence Tables of the literature used to derive the Recommendation and the parameters upon which the forecasting equations are based. The literature cited on the Recommendation page undergoes a rigorous review by board-certified physicians with expertise in the principles and practices of both evidence-based medicine and critical appraisal of the literature. For a detailed description of the selection and review process, along with its potential limitations, visit the Forecasting Methodology page.

Zynx Forecasting: Limitations section

The Limitations page lists the limitations of the forecasting calculation, as well as any assumptions made to facilitate the development of the equations.

Zynx Forecasting: Sample Calculations section

The Sample Calculations page makes the Forecasting Calculator equations completely transparent by showing how the absolute risk reductions, relative risk reductions, and other statistical values from the literature are used to calculate the clinical and cost-related benefits. Sample Calculations are provided for each forecaster so that users can clearly understand the assumptions used in the Forecasting Calculator section and comprehend the scientific and mathematical underpinnings of the forecaster. Inputs to these sample calculations are the default values, which provide representative patient statistics for a hypothetical hospital. These sample calculations also provide examples of the types of potential benefits that an institution may realize by implementing specific process-improvement interventions.

Zynx Forecasting: Supplemental Literature section

The Supplemental Literature section provides a broader body of evidence for a given topic to augment the Guideline or Cost-Savings Opportunity evidence.

ZynxMeasurement

ZynxMeasurement offers tools to measure the impact of evidence-based clinical decision support on clinical outcomes, processes of care, and financial results.

ZynxOrder

ZynxOrder offers an advanced knowledge-management system for developing and maintaining evidence-based order sets, alerts, and reminders. ZynxOrder empowers organizations to put evidence-based healthcare into practice and, as a result, adhere to national performance measures and measurably improve the quality of patient care.

ZynxRehab

ZynxRehab enables your interdisciplinary teams to put evidence-based healthcare content into practice and, as a result, measurably improve the quality of care and comply with regulatory standards.