I/O Surg

USER MANUAL

Version 1.2

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Changelog

▍Features

Version 1.1

- Reference Notes functionality added; administrative users are now able to write in custom notes per individual codes
- New Notes section created to collect all codes with custom notes in them
- Old References switched to Bulletin Board
- Flag was implemented to indicate codes with status changes
- When searching, partial numbers are treated only as starting digits
- Frequently searched/clicked codes are indexed to appear at the top of search results

Version 1.2

- Keywords available on Codes

Welcome!

Congratulations on your purchase of I/O Surg, a 2-click search engine with built-in procedural codes to allow users to quickly and accurately identify the appropriate CMS [based on addendum E]/CPT[©] inpatient/outpatient status. This solution ensures the appropriate billing code and patient status are correctly communicated throughout the entire system to minimize costly errors in pre-op patient scheduling. This manual will guide you in using the solution to:

- Search CPT codes by number and description
- Determine current and previous CMS status of CPT codes
- Create/manage users for I/O Surg
- Post reference material to a bulletin board
- Add/remove custom notes on code results to inform users

Signing In

To sign in, go to the URL which was given to you as an I/O Surg client. A username and password box should appear (Figure 1). Enter your username and password and click Sign In. By default, you should be taken to the Search Codes screen.

▌EULA

If you have not previously signed in, you will be asked to agree to an End-user License Agreement (Figure 2). If you agree, then you will be signed in. If you cancel, you will b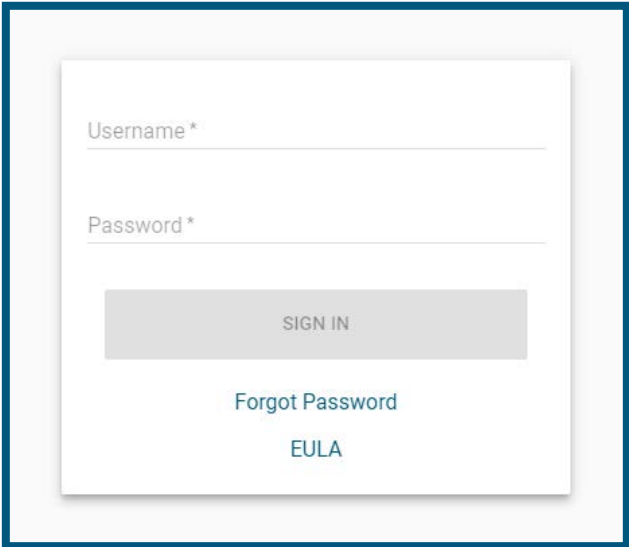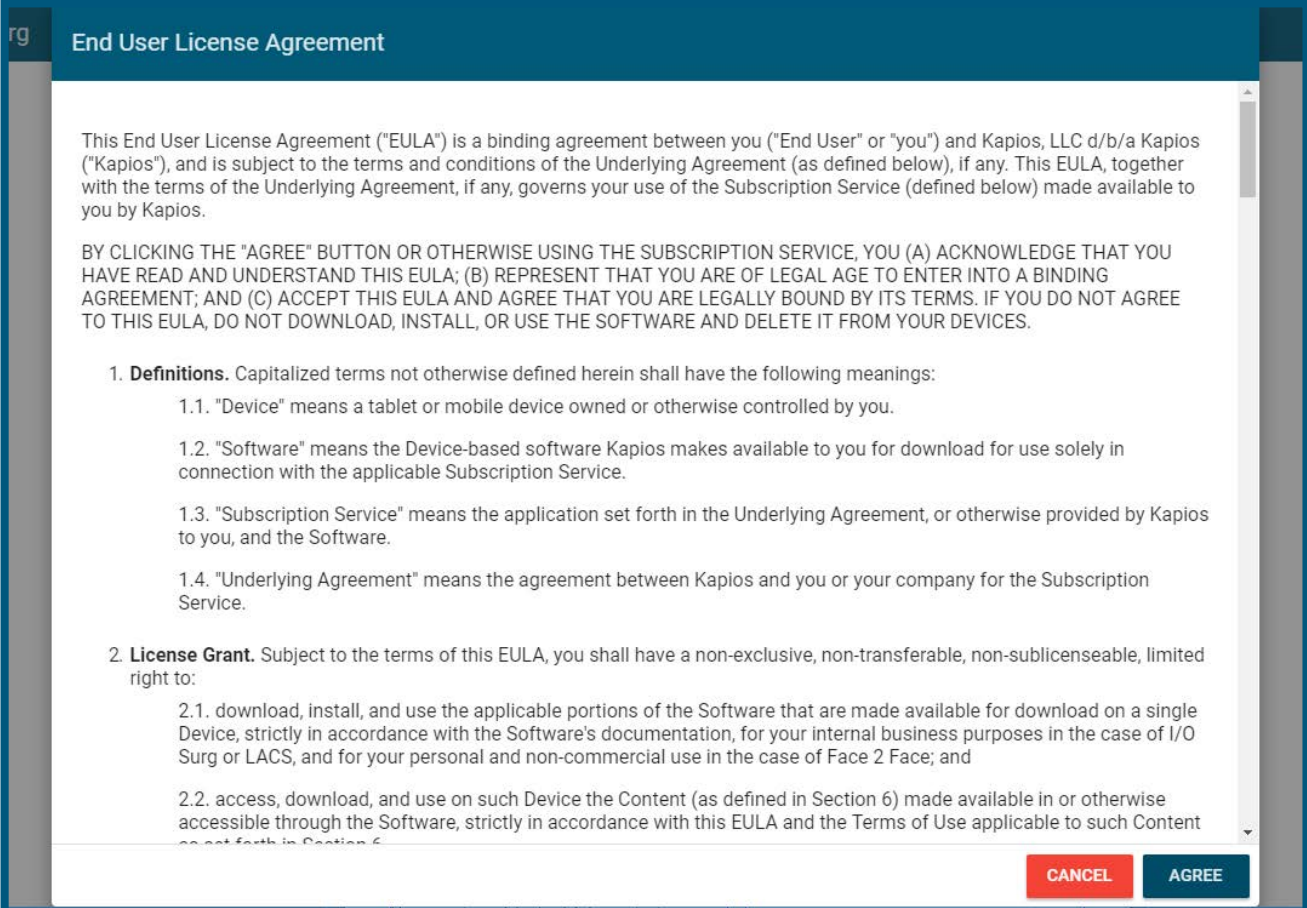e taken back to the previous Sign In screen. You must agree to the End-user License Agreement in order to use the I/O Surg solution.

Figure 1

Figure 2

Lockouts

If you supply the wrong username or password at the Sign In, you will receive an error stating the number of attempts remaining (Figure 3). If a user fails three attempts, that user will be locked out and receive a lockout error on-screen. If that happens, an Administrator must be contacted to unlock the user from the Users section. A locked Administrator account can only be unlocked by the Support Team. See section "Unlock User" for more information.
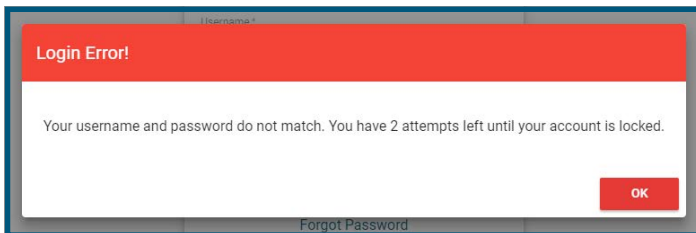
Figure 3

Forgot Password

An active/unlocked user who has forgotten their password can request a password reset by clicking Forgot Password on the Sign In screen. A dialog will open, where the user can provide their username and click Submit (Figure 4). An email will be sent to the address registered to that user (this may take a few minutes). Clicking the link in the email will guide the user to a

page where they can reset their password. A locked user cannot request a password reset.
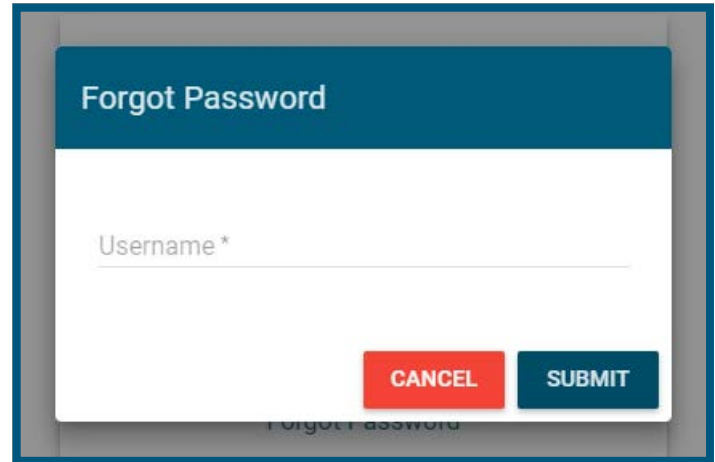
Figure 4

Search Codes

❚ Choosing a Year

By default, I/O Surg presents search results based on the current calendar year. At the top left, a previous year can be chosen (Figure 5), which will result in a warning (Figure 6). When searching in a previous year, search result detail dialogs will also show a special message.

❚ Searching Codes

CPT codes can be searched by number, or by text. Searching by number will show results based upon the code. Searching by text will match results based upon Long Description.

❚ Status

The status of a code (Inpatient/ Outpatient) is shown in grey for 'Outpatient', and blue for 'Inpatient'. If a status has changed from a previous year, a flag will show next to the status, with the opposing color.
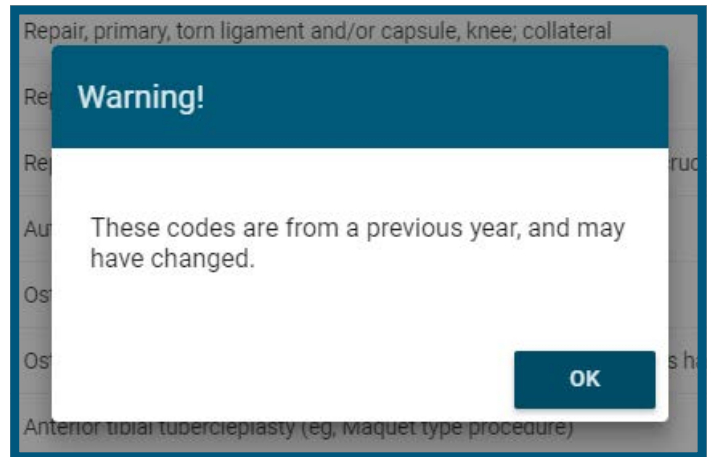
Example: if this year's status for a code is 'Outpatient', but last year it was 'Inpatient', the status will be grey and the flag next to it will be blue (Figure 7).

❚ Favorites

Codes can be saved as favorites by clicking the star next to it. A gold star shows that the code has been saved. An empty star shows that a code has not been saved. Favorites are set per user. Any favorite set

by a user can only be seen by that user. A complete list will be available under 'Favorites' in the menu.

View Details

Clicking or tapping on a code result will show its details in a dialog. The dialog will show, in full, 'Procedure Type', 'Short Description', 'Long Description', and any 'Notes'. If the status has changed from a previous year, a message will show. Likewise, if the user is currently viewing results from a previous year, a warning message will show in the detail dialog (Figure 8).

Add/Edit Notes

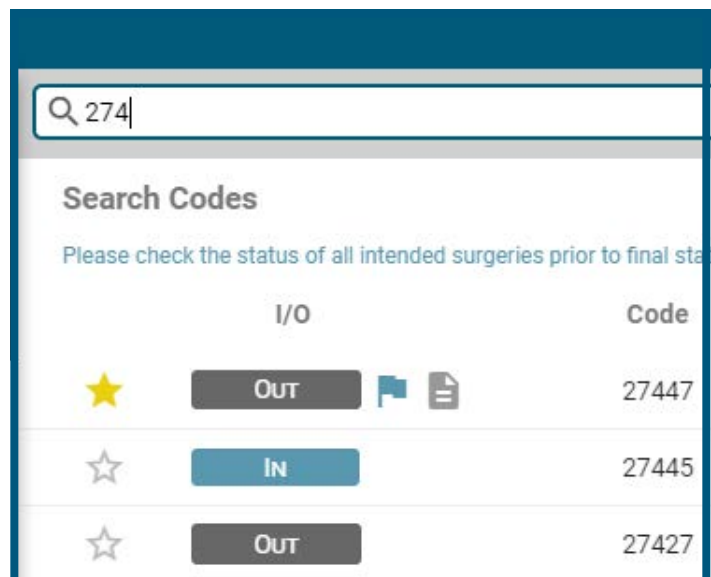Only Administrator-level users can leave notes on a CPT code. Clicking 'Add Notes' on a dialog will make the Notes field available. After typing notes into the field, an Administrator must click the save button to complete the process. Notes saved to a code will be visible to any user, at any level in your healthcare organization.

A note icon displays next to a search result if that result already has a note on it. If notes already exist, they can be edited by an Administrator by re-typing the value in the field. The save button must still be

Code: 27447 ⭐

Procedure Type: Outpatient

Short Description: Total knee arthroplasty

Long Description: Arthroplasty, knee, condyle and plateau; medial AND lateral compartments with or without patella resurfacing (total knee arthroplasty)

Notes:

Hip and knee arthroplasty procedures have been under scrutiny by both Medicare Administrative Contractors and Recovery Audit Contractors. Although the primary concern has been adequate documentation of medical necessity, accurate coding of primary, revision, and conversion arthroplasty procedures is also important. Total knee replacement involves replacing the articular surfaces of the femoral condyles, tibial plateau, and patella. This also includes bicompartmental knee replacement, partial knee replacement, tricompartmental knee replacement, and unicompartmental (hemijoint) knee replacement.

Created by: Phil Sung Admin
Last modified by: IOSurg
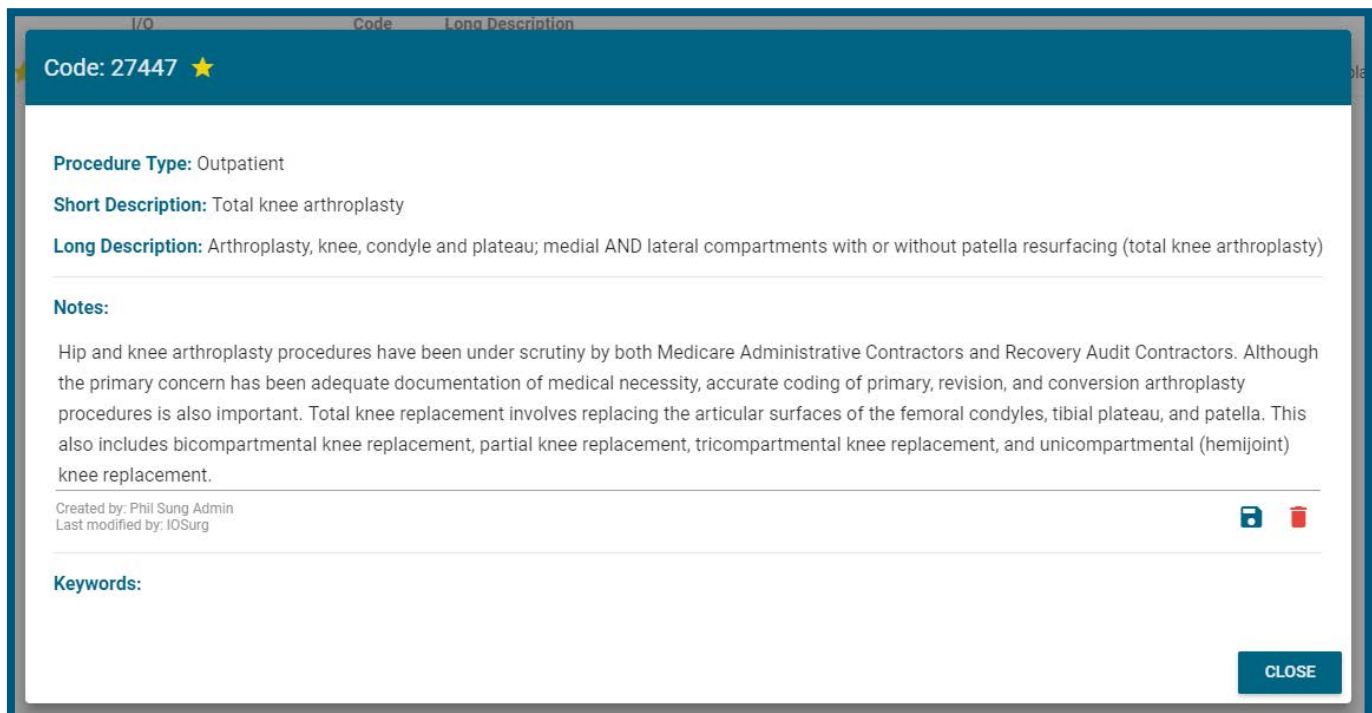
Keywords:

CLOSE

Figure 8

clicked to confirm the edit. To delete notes directly from a dialog, an Administrator can click the delete button.

▌Keywords

Keywords added to a search code enhance the ability to search for that code by text. Only Admin-level users have the ability to edit keywords on a code. All other users will only have read ability.

To add a keyword to a code, open that code's dialog, type a term into the Keywords line and hit Enter on the keyboard (Figure 9a). The new keyword will appear as a tag. Each tag can be removed by clicking the X on that tag. No save step is needed, as the changes are auto-saved.

Figure 9a

▌Filter Notes

A full list of Notes is available to Administrators. This list can be accessed by clicking 'Notes' in the side menu. The list of notes can be filtered by typing keywords into the search box at the top of the 'Notes' page (Figure 9b). Notes can be edited and accessed by clicking, just like in the search results.
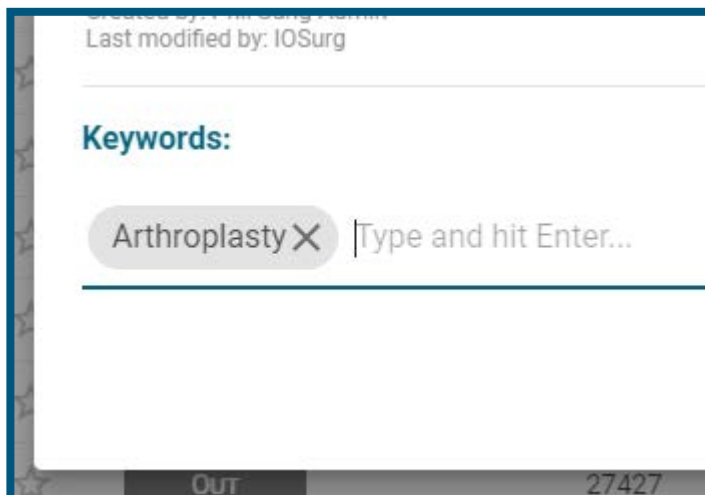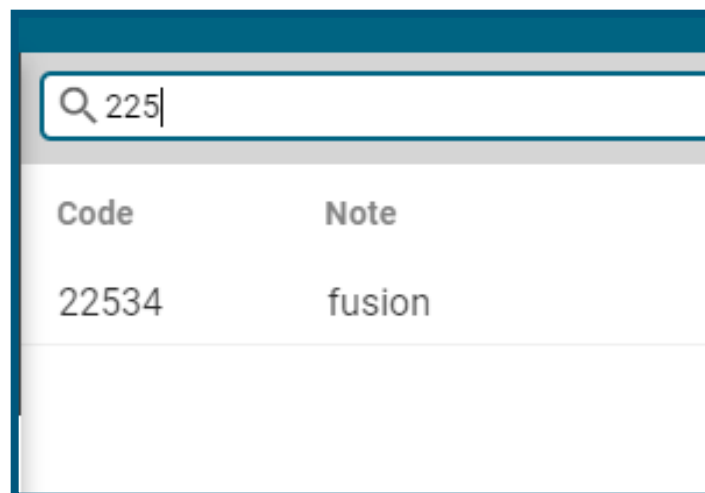

Figure 9b

Bulletin Board

▌View a Post

The bulletin board is used to provide links to web references for the users and can be accessed from the side menu. Each board post will have a title, reference URL and text content. Like notes, the posts can be viewed by anyone, but only Administrators can make and edit posts.

▌Add a Reference

By clicking the grey plus-sign icon at the top-right of the Bulletin Board page, an Administrator can create a new post for the bulletin board. The title, URL and content fields are required for each post (Figure 10). Be sure to use a valid URL format by including **http://** or **https://** protocol. The title will appear at the top of the post, whereas the content will appear as the body. Posts can be marked as News or Resource, allowing for posts to be filtered by each type at the top right of the feed.

Newer posts will appear at the top of the feed. A reference can be viewed by clicking the arrow symbol at the bottom right of each post. The URL will open in a separate window.
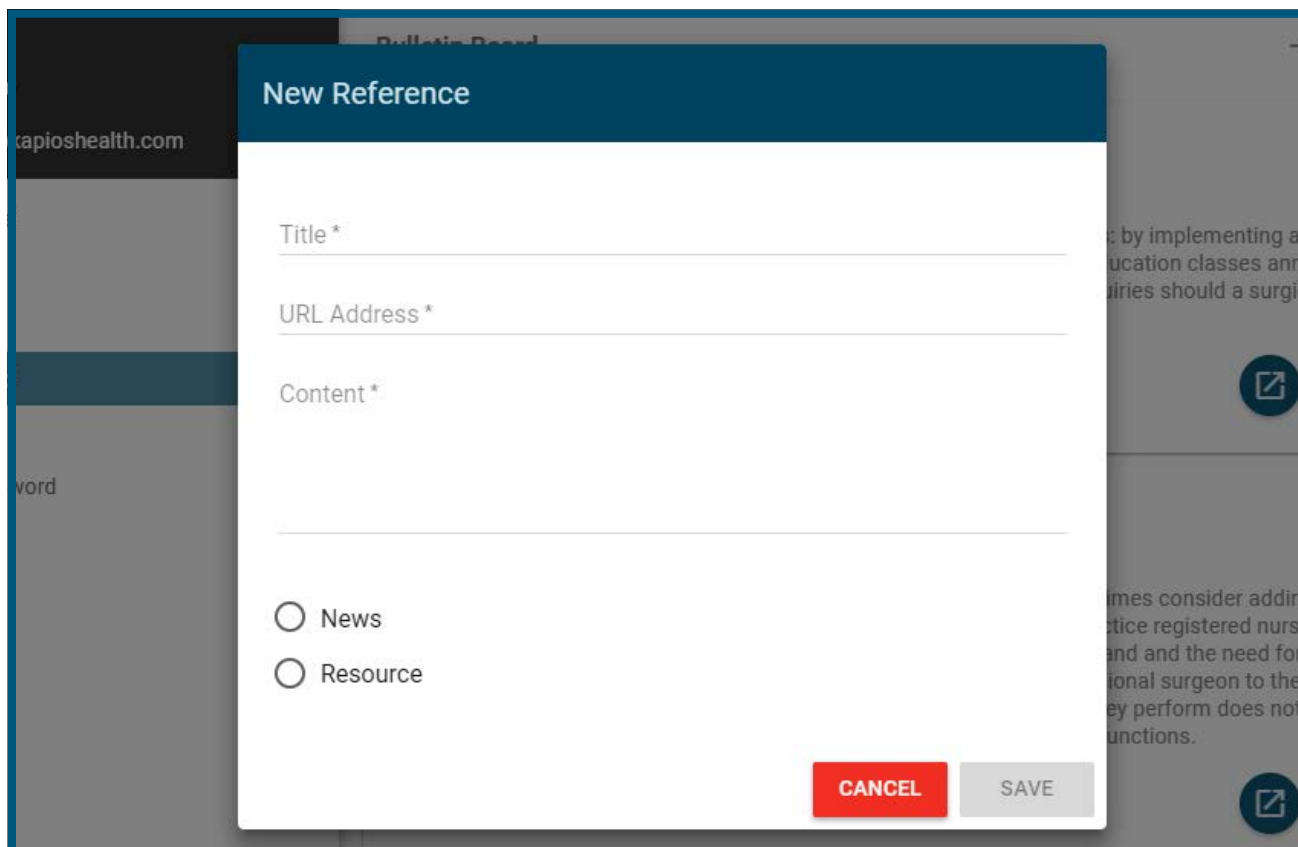

Figure 10

Edit/Delete a Post

An Administrator can edit a post by clicking the pencil icon at the bottom right of that post (Figure 11). After changing the details of the reference, click save to submit the changes. A reference can be deleted by clicking the trashcan icon at the bottom right of that post. A confirmation box will appear and 'Delete' can be chosen from there.
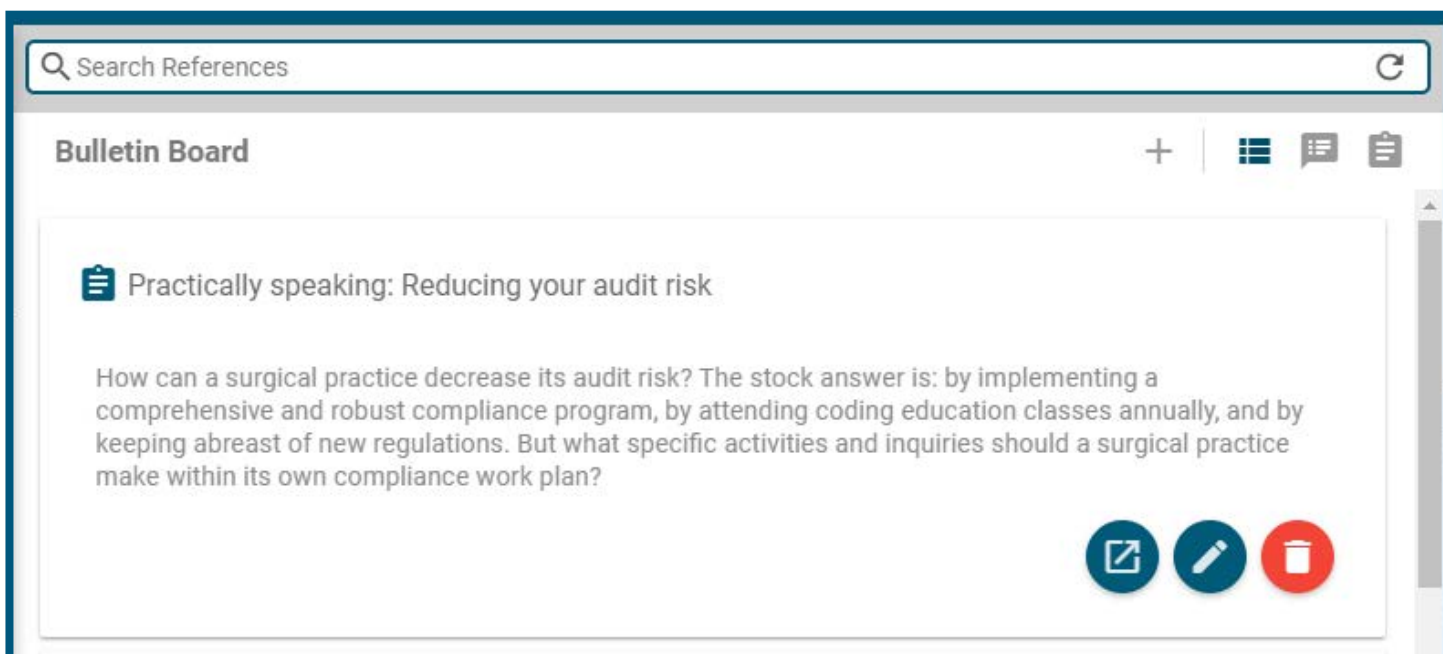

Figure 11

Users

❙ Seats

Only Administrators can see the list of users by accessing the 'Users' choice in the side menu. Each user in the system uses one 'Seat'. The number of used/total seats is available at the top left of the Users screen (Figure 12). The total number of seats can affect the cost of I/O Surg. To request a higher number of total seats, contact the Support Team. While the total number of available seats has not been met, a new user can be added without additional cost.
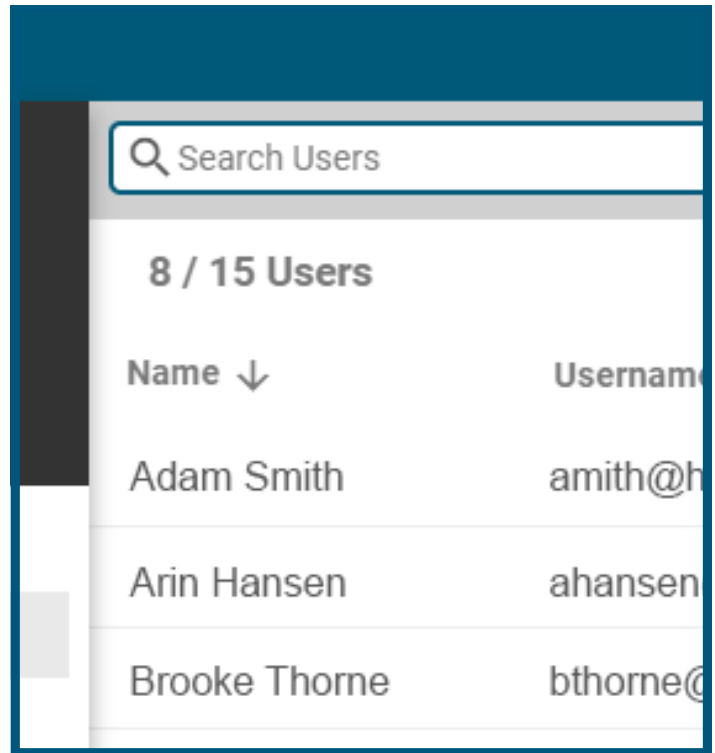

Figure 12

Figure 13

User Levels

Any user created by an Administrator will automatically be a Standard user. Administrators cannot create other Administrators or change the user-level of existing users. To add an Administrator-level user, please contact support.

Add User

Clicking the 'Add User' button will open a new dialog (Figure 13). A new user must have a username, name, email address and password. Any attempt to create a username which already exists will result in an error message after clicking save. The user can also be created in an inactive status and activated later by editing the user.

A new user will receive a welcome email with instructions at the email address specified when they were created.

Edit/Delete User

Click on a user from the list to edit their information. The name and email address can be edited and saved from the resulting dialog. The username cannot be changed.

In order to reset the password as part of the user update, check the box next to 'Password reset'. A pair of password

confirmation boxes will appear. The password in each must match before you will be allowed to save.

To delete a user, click the trashcan icon at the right of that user in the list. A confirmation box will appear. You must click the 'Delete' button on this confirmation box to completely remove the user.

Unlock User

If a user fails to provide correct username and password credentials three times, they will be locked out of the system entirely until an Administrator unlocks their account. A locked user will have a filled lock icon next to their user listing. To unlock the user, click the lock icon and confirm the dialog which pops up (Figure 14). Their number of sign-in attempts will be reset to three. A locked Administrator can only be unlocked by support.
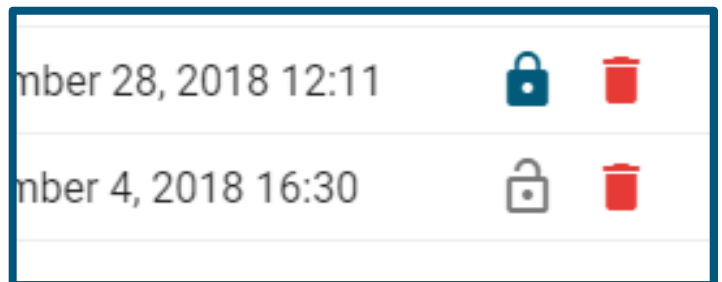

Figure 14

Change Password

After unlocking the user, if it is also necessary to reset their password, this can be done from the Edit User dialog. However, if a user is active, they can change their own password from the 'Change Password' choice in the side menu. A dialog will appear where they can confirm a new password (Figure 15). This side menu option can only be completed while logged in. Remember that 'Forgot Password' is always an option from the Sign-in screen.
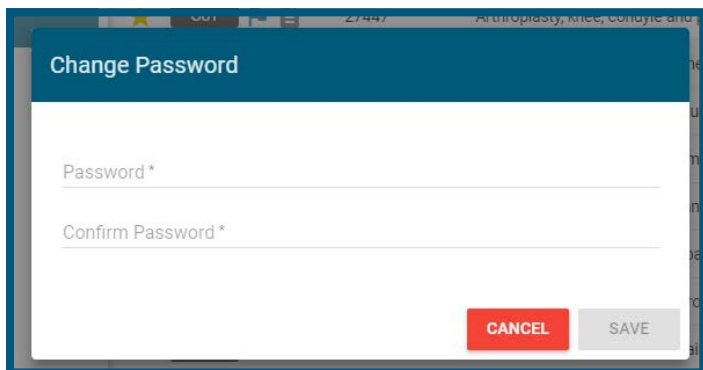

Figure 15

Contact Support

Any operational or administrative issues, including user lock-outs or password resets should be addressed with your direct supervisors.

For any technical issues with I/O Surg, send an email to iosurg.support@kapioshealth.com and don't forget to include:

- Your client name and location
- Your name
- Your title (if applicable)
- Your own contact information
- A detailed description of the issue you are having, with any relevant examples