

**CompliSign**

for

Operator Admin

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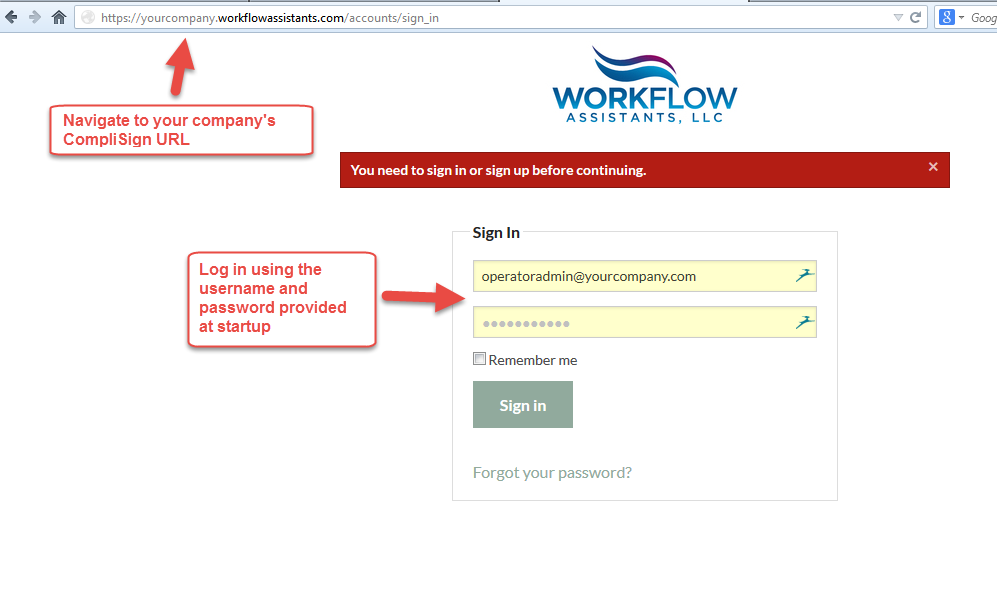
# Operator Admin Functions

CompliSign users with an Operator Admin login have the right to:

* View, edit and add Patients, Technicians, Physicians and Facilities
* View and edit existing orders
* Make new orders and schedule technicians
* View and edit schedule
* View physician letters
* Create and view custom Reports
* View activity

# Logging in

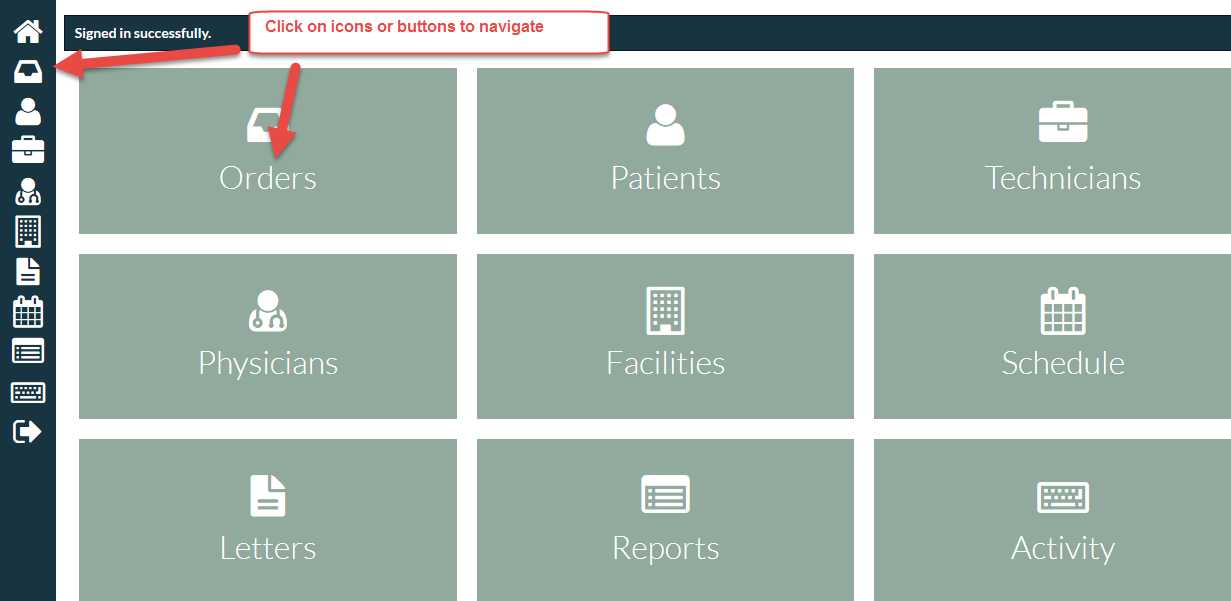
* Navigate to your company’s CompliSign URL
* Enter the username that you received at startup
* Enter the password that you received at startup



# The Operator Admin Dashboard

From this Dashboard, the Operator Admin user can:

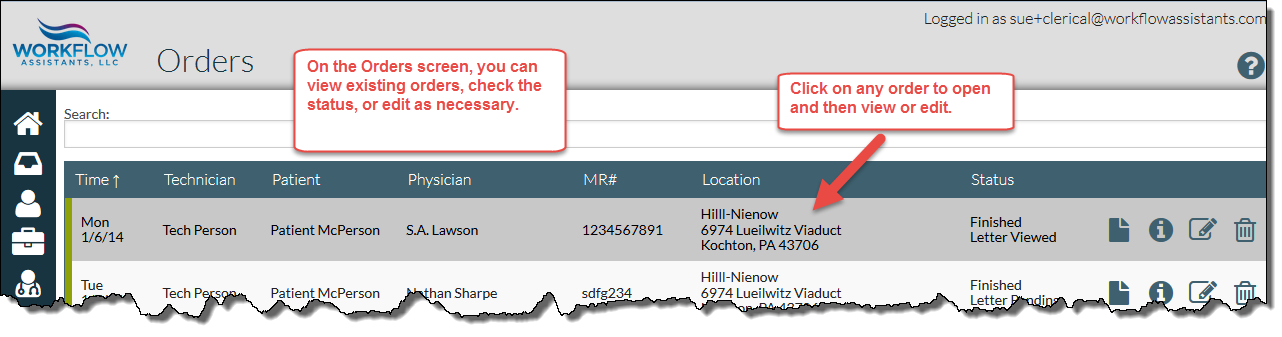
* View, edit and add Patients, Technicians, Physicians and Facilities
* View and edit existing orders
* Make new orders and schedule technicians
* View and edit schedule
* View physician letters
* Create and view custom Reports
* View activity

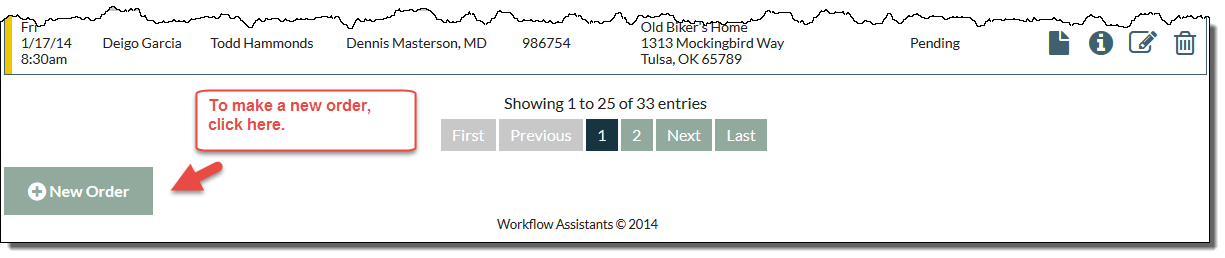


# Orders

On the Orders screen, Operator Admin users can:

* View existing orders
* Check the status of orders
* Edit as necessary
* Make new orders

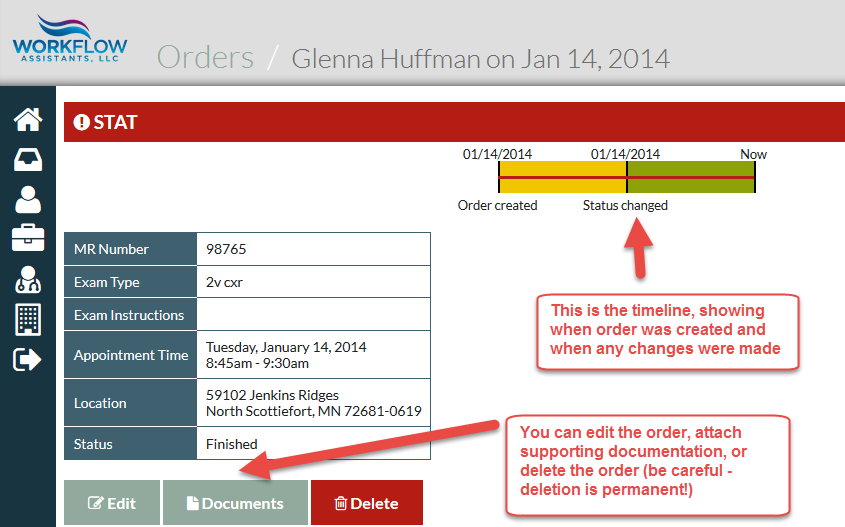




# Viewing and editing an order

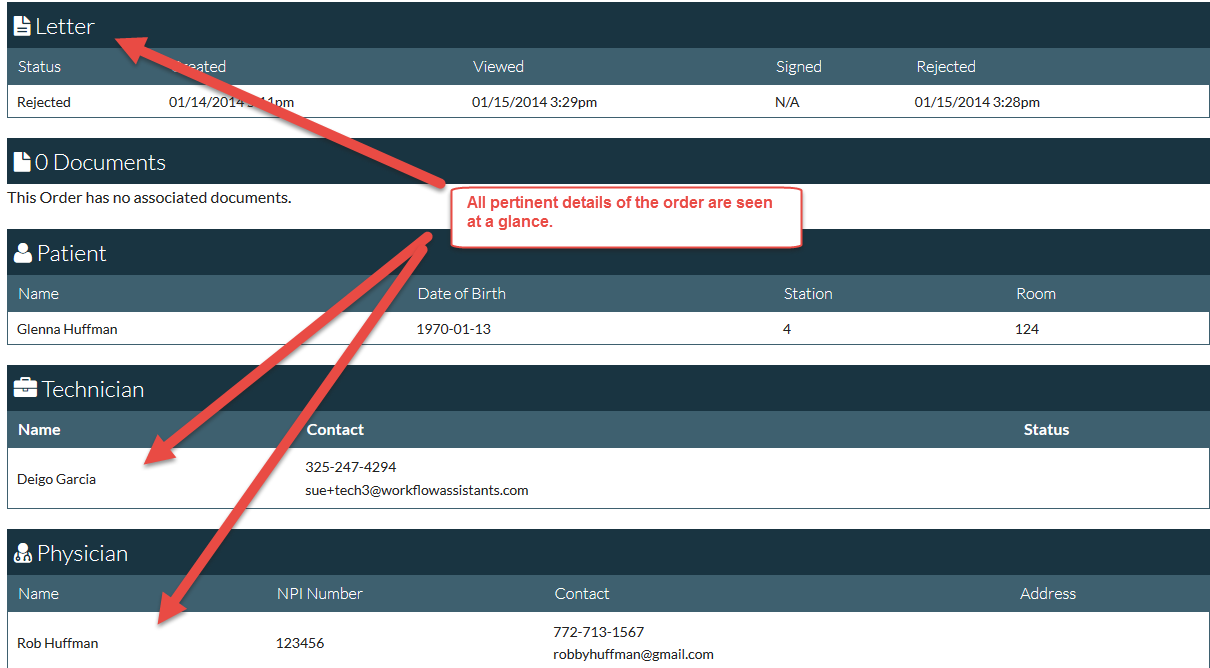
From this screen, the Operator Admin user can:

* Edit order
* Attach supporting documentation
* Delete the order



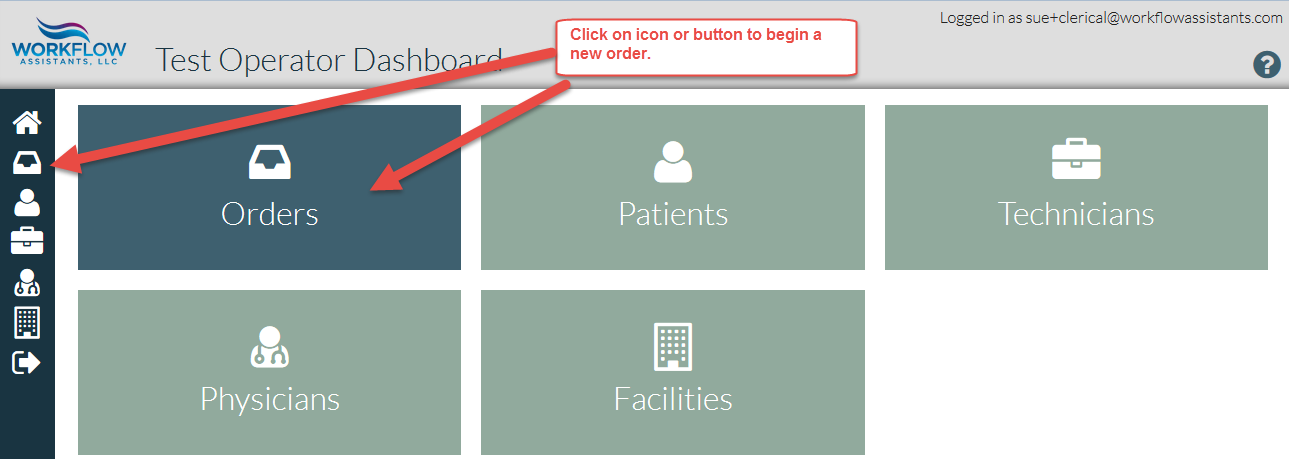
# Order Details

From this screen, the Operator Admin user can see all pertinent order details at a glance.

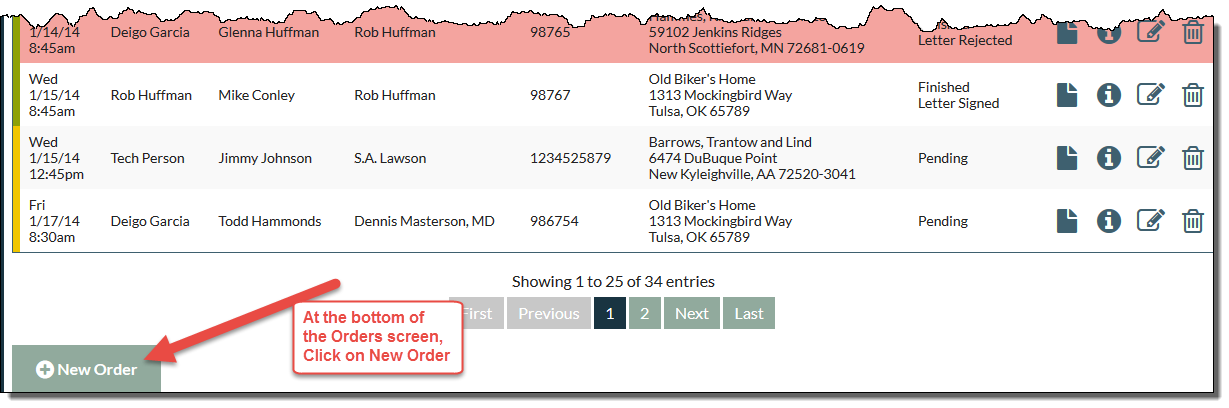


# Making a new order

From the dashboard, click on the Orders button or icon

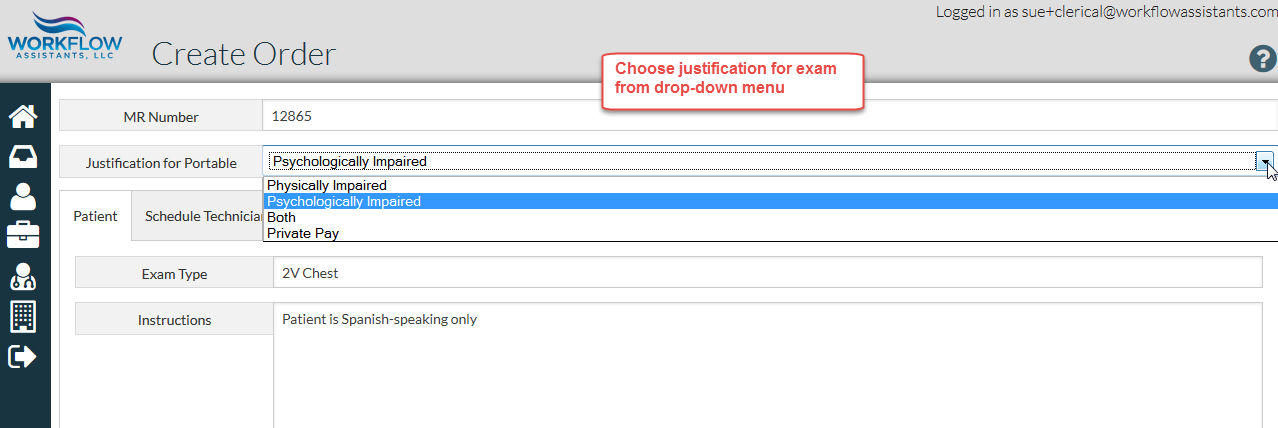


At the bottom of the Orders screen, click on New Order.

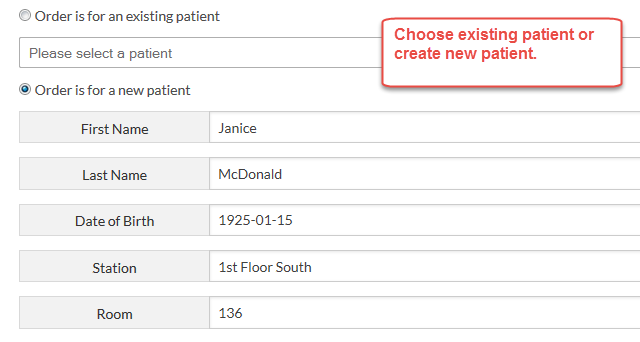


# Adding order information

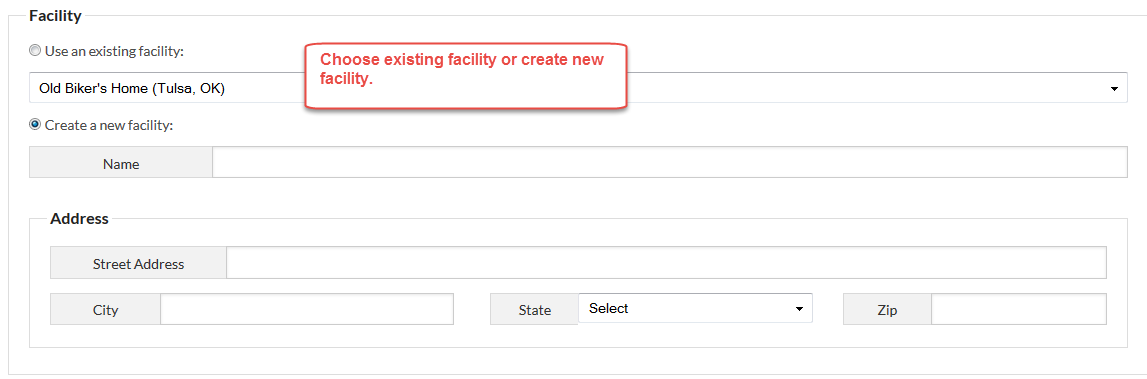
On the Create Order screen, enter patient information on the Patient tab. The justification for a portable exam field is a drop-down menu.



Select existing patient from drop-down menu, or add information for a new patient.

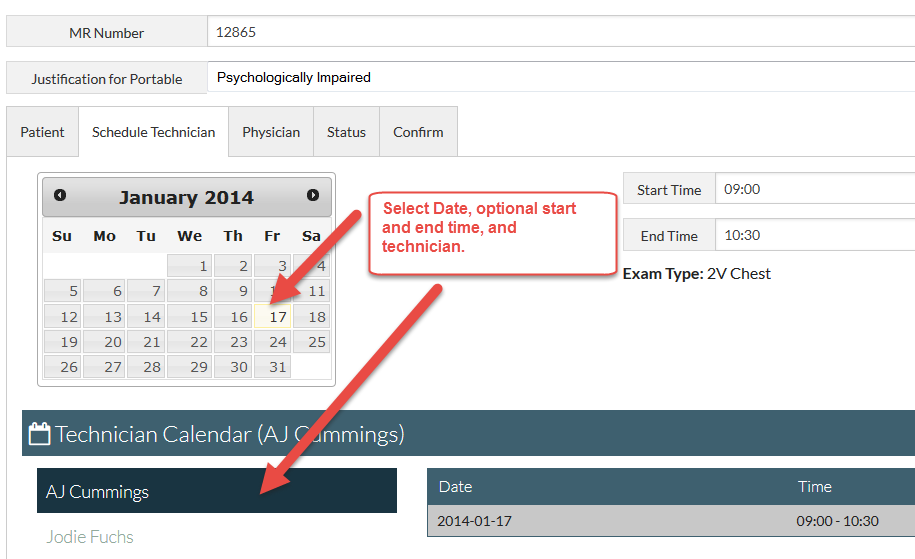


Choose existing facility from drop-down menu or add facility.



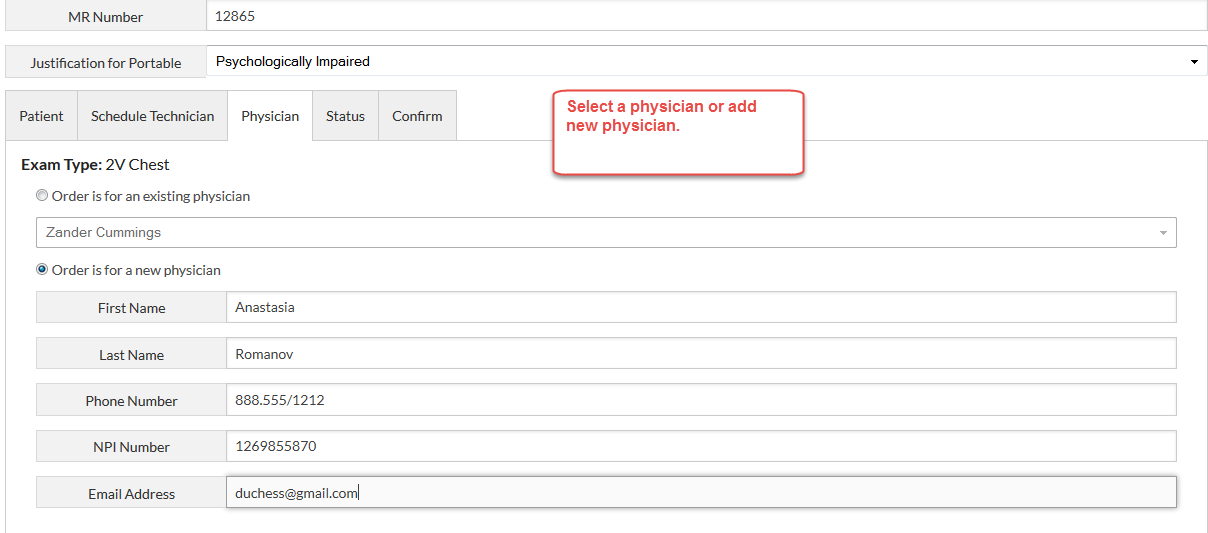
# Schedule exam

On the schedule technician tab, select the date on the calendar, select start time and end time from drop-down menus if applicable, and select technician from list.



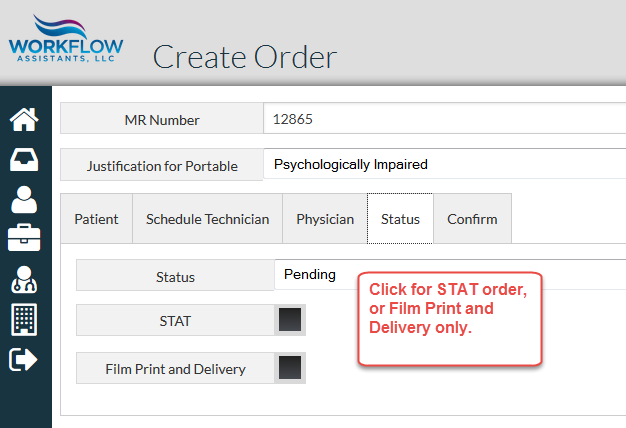
# Assign to physician

On Physician tab, select physician from drop-down menu or enter information for new physician.



# Select Status

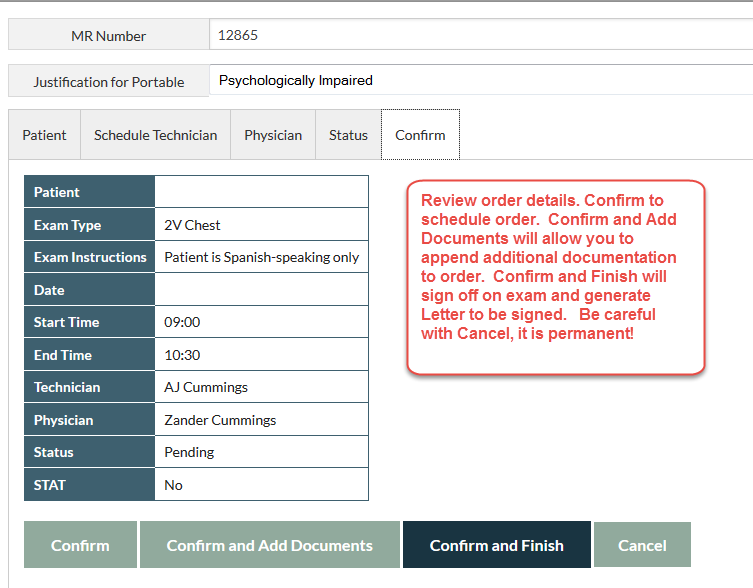
Status for a new order is Pending by default. Click on STAT if applicable. Click on Film Print and Delivery if applicable.



# Confirm Order

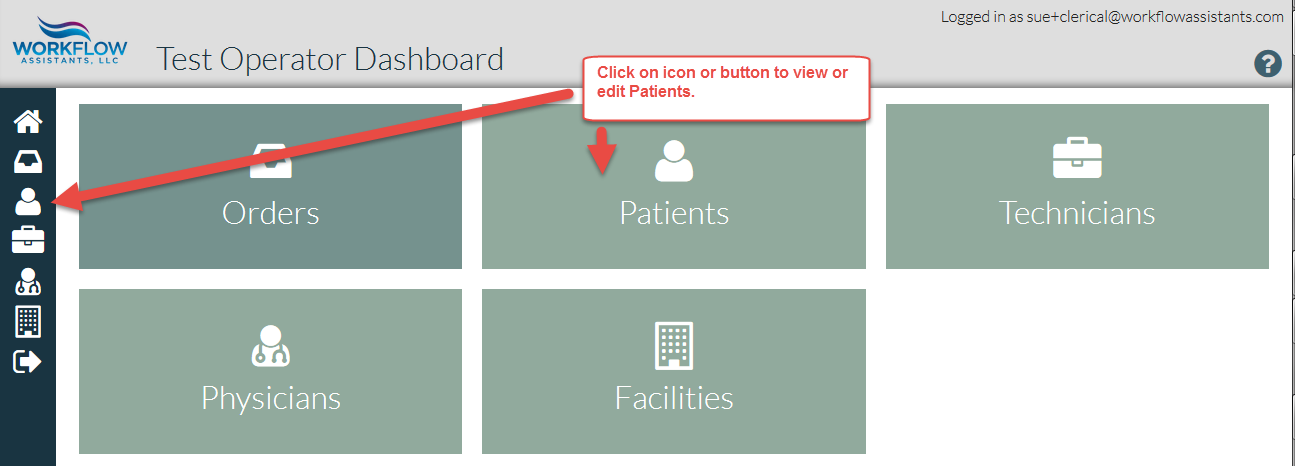
On Confirm tab, the Operator Admin user can:

* Review order details
* Confirm to schedule order
* Confirm and add documents to append supplemental documentation to order
* Confirm and Finish to sign off order and generate Letter to be signed



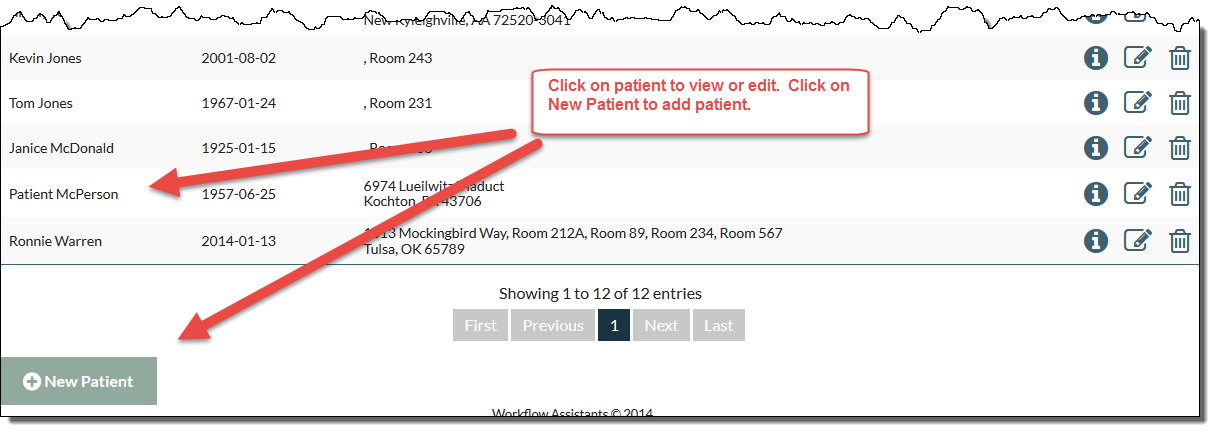
# Patients

On the Dashboard, click on Patients button or icon to view or edit patients.



# Adding or editing patients

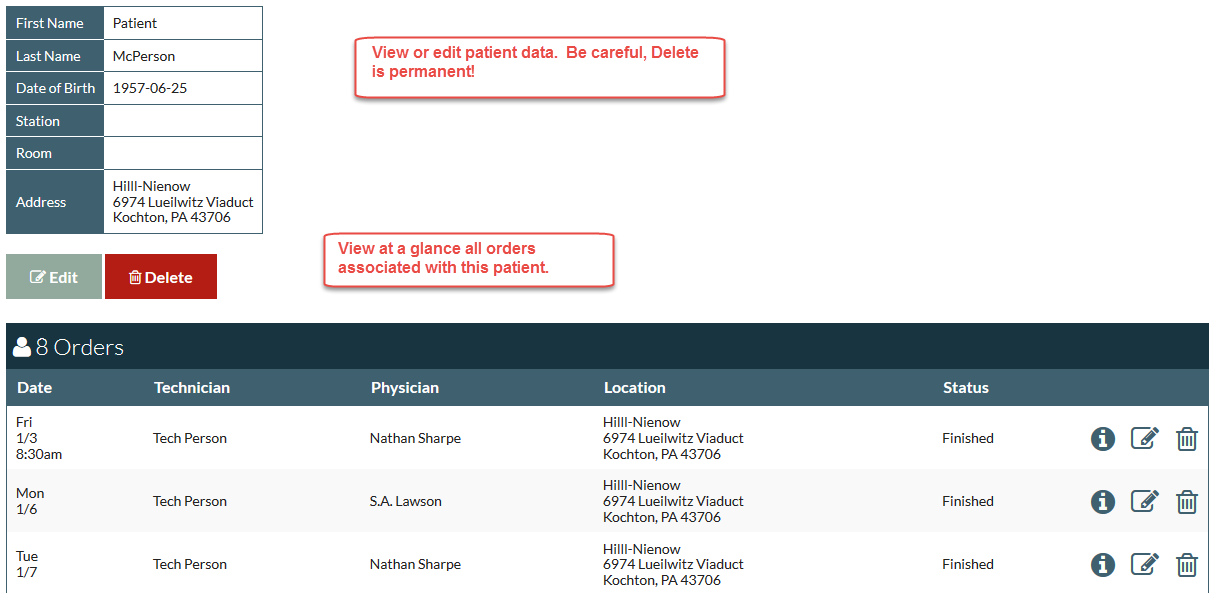
Click on patient name to view patient. Click on New Patient to add patient from this screen. Note – patient can also be added when creating new order.



# Patient data at a glance

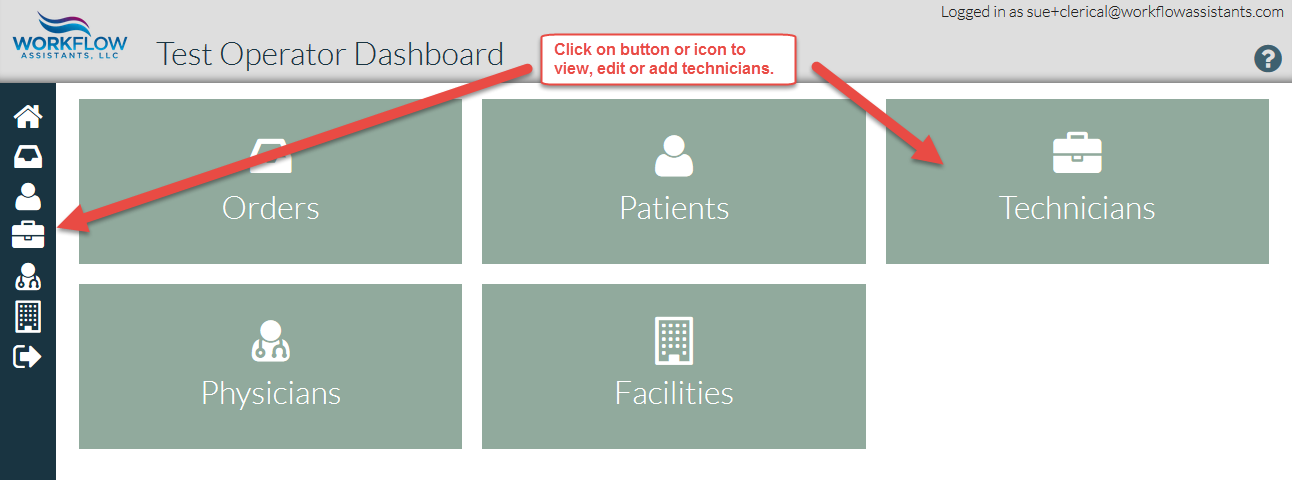
From this screen, the Operator Admin user can:

* View patient data
* Edit patient data



# Technicians

From the Dashboard, click on Technicians button or icon to view, edit or add technicians.



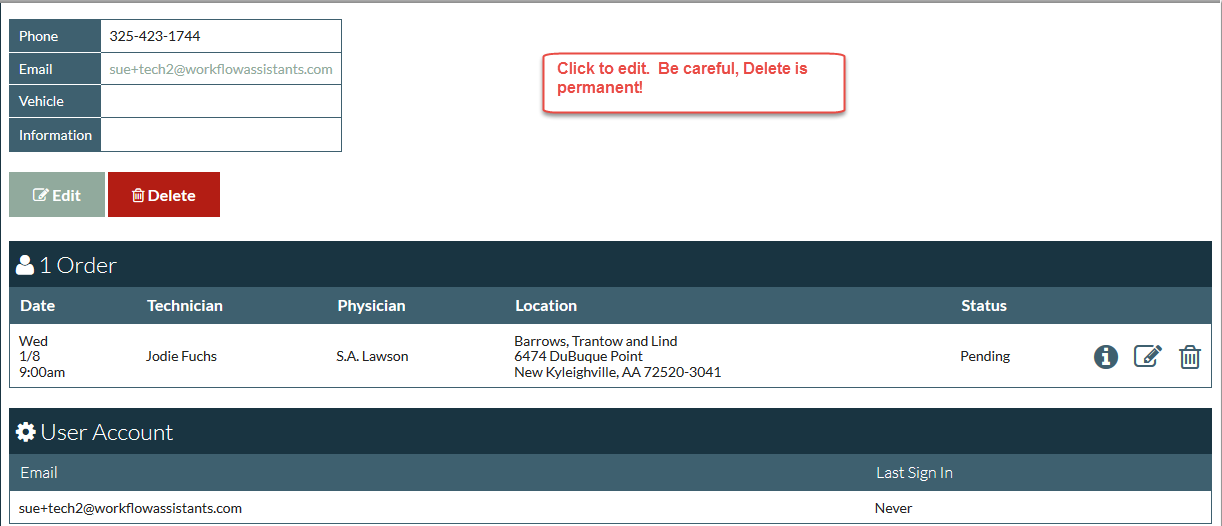
# Adding or editing a technician

Click on technician to view or edit details. Click on New Technician to add technician.



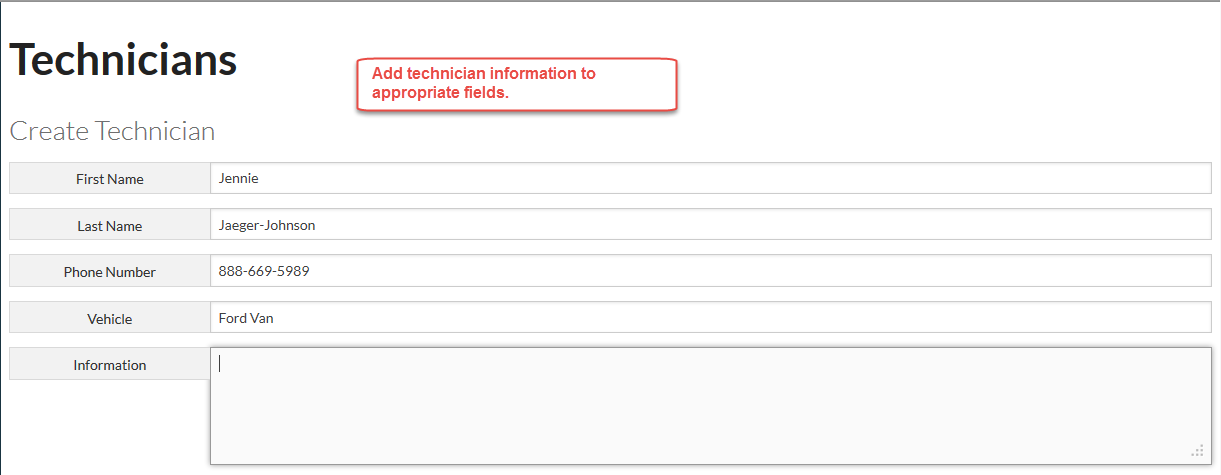
# Technician data at a glance

Click to edit technician data.

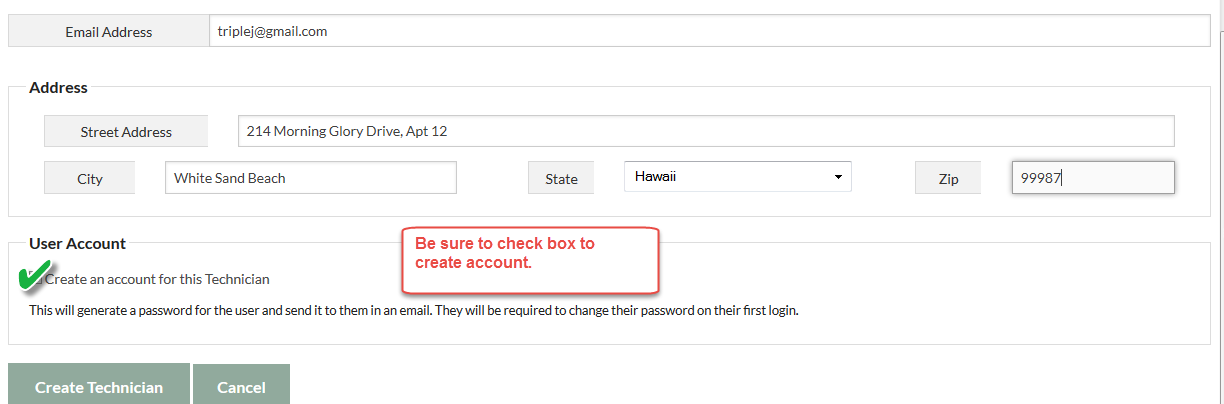


# Adding a technician

Add technician information to fields.

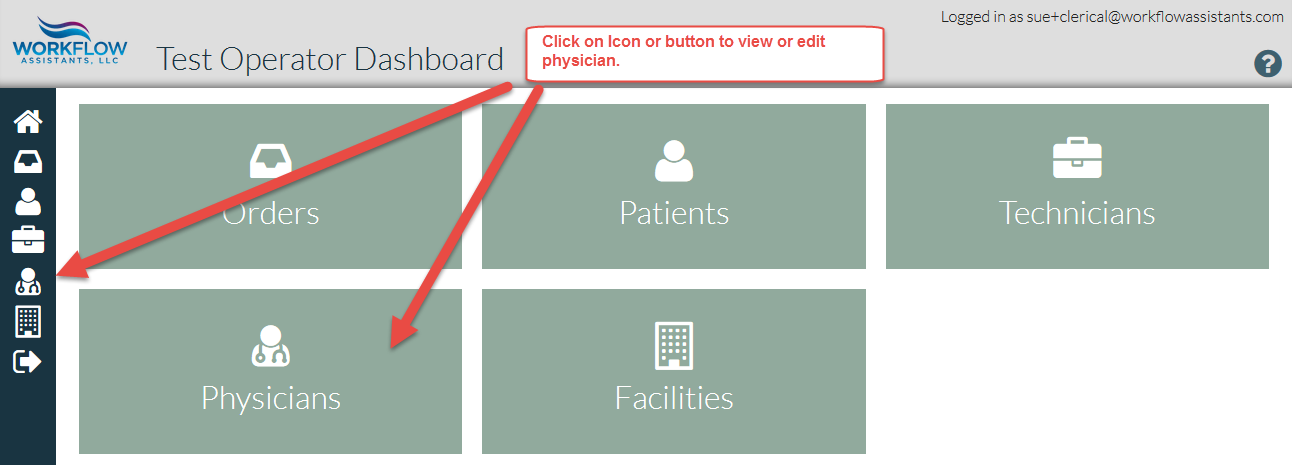


When finished, be sure to check box to create an account for the new technician.



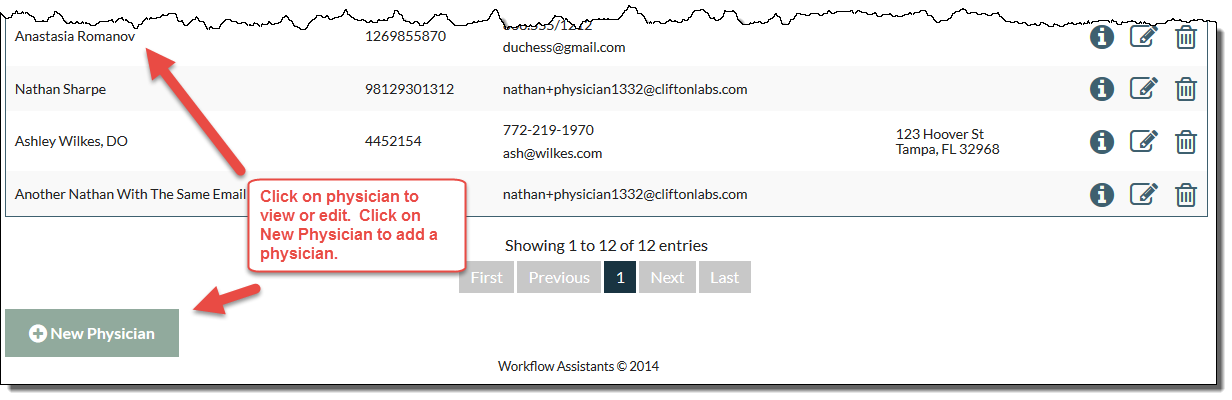
# Physicians

From the Dashboard, click on Physician button or icon to view, edit and add physicians.



# Viewing, editing or adding a physician

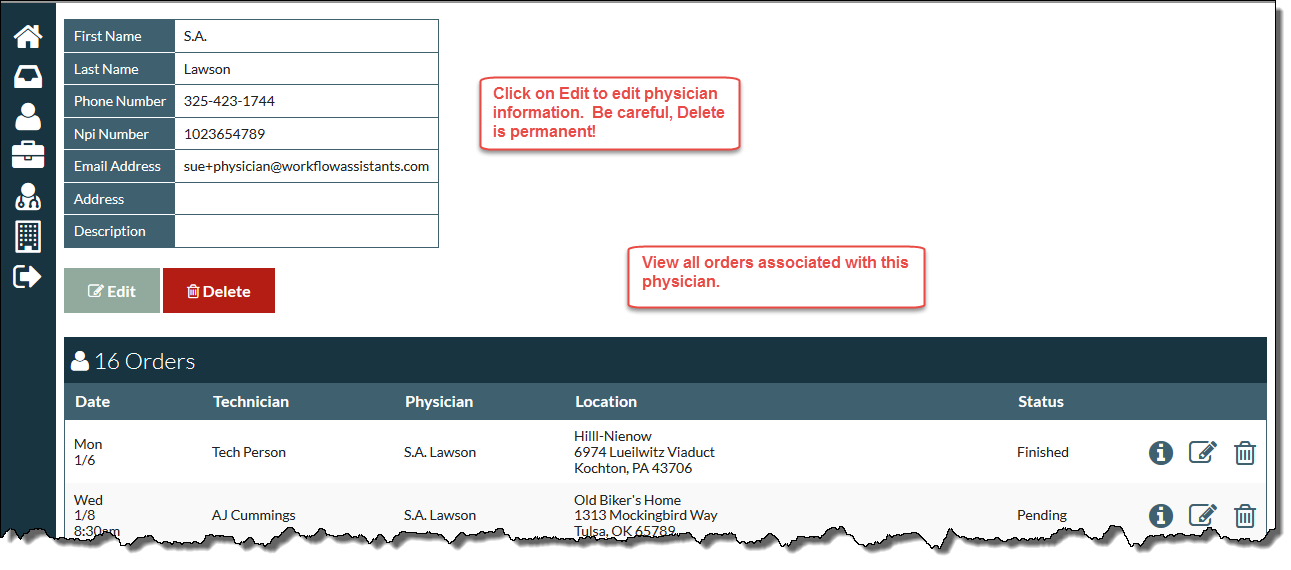
Click on physician name to view or edit. Click on New Physician to add a physician.



# Physician data at a glance

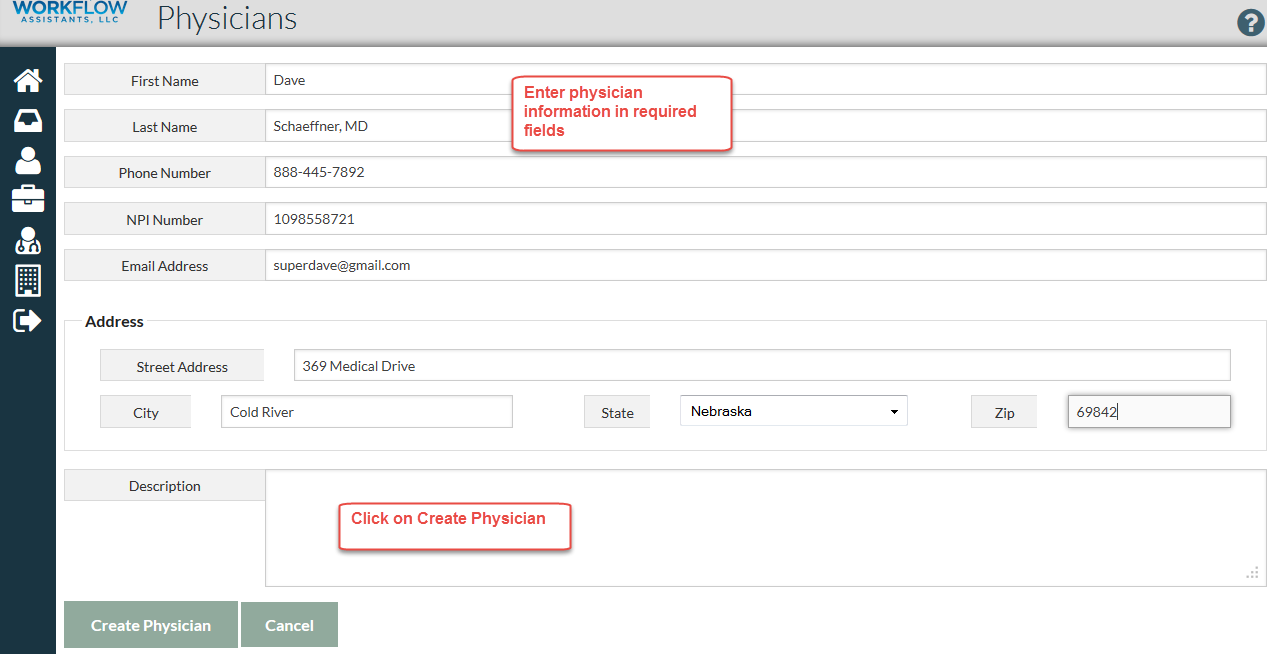
From this screen, the Operator Admin user can:

* Edit Physician information
* View all orders associated with this physician

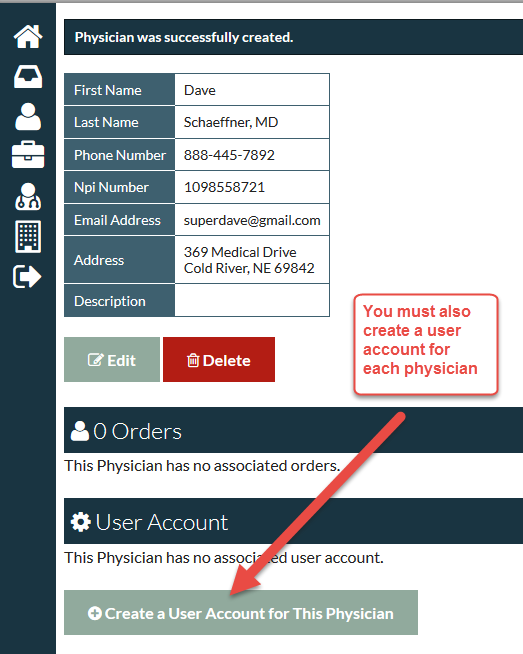


# Adding a physician

Enter physician information in fields. Click on Create Physician.

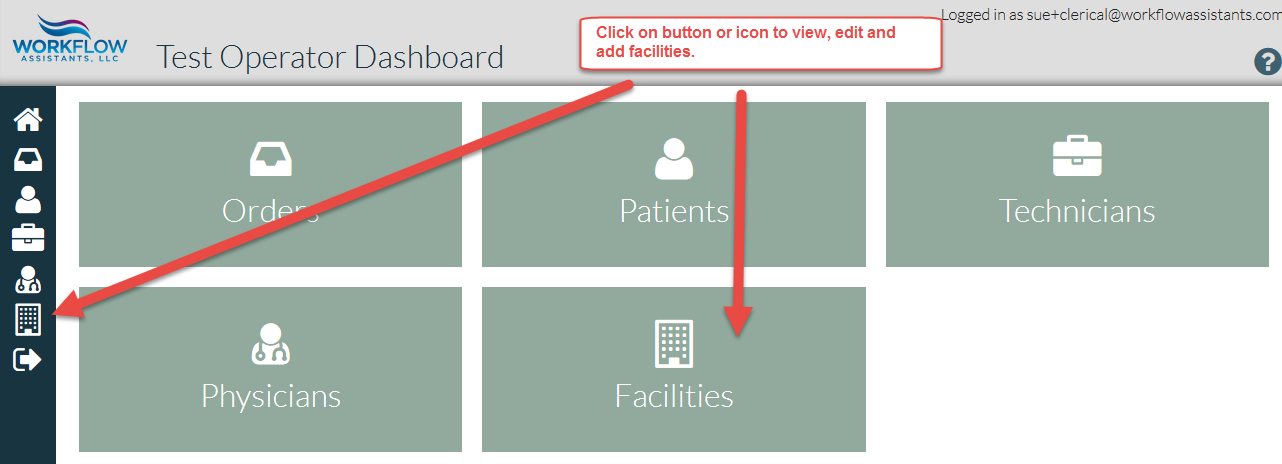


Creating Physician user account

Creating a physician has one additional step; a special user account with additional security features must be created. Click on Create a User Account for This Physician. 

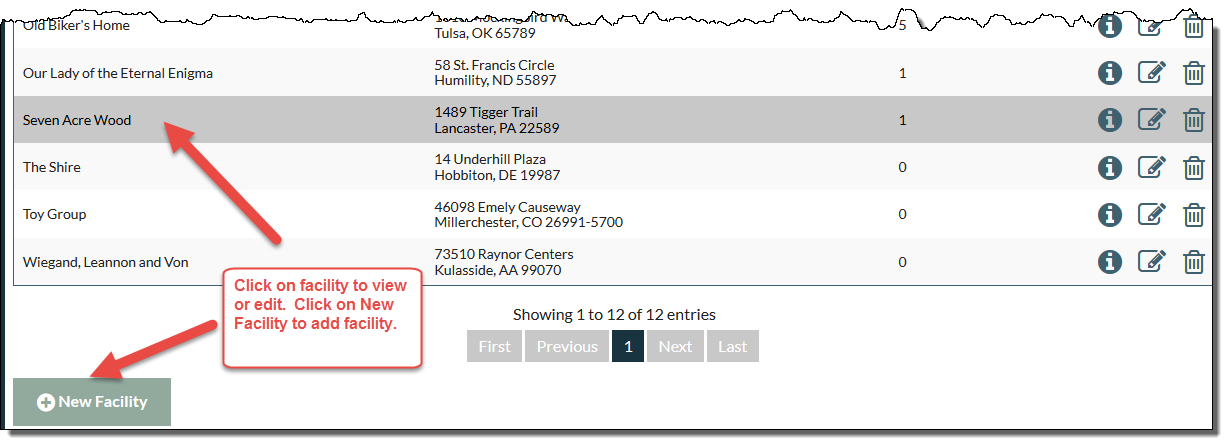
# Facilities

From the Dashboard, click on the Facilities button or icon to view, edit or add facilities.



# Viewing, editing or adding facilities

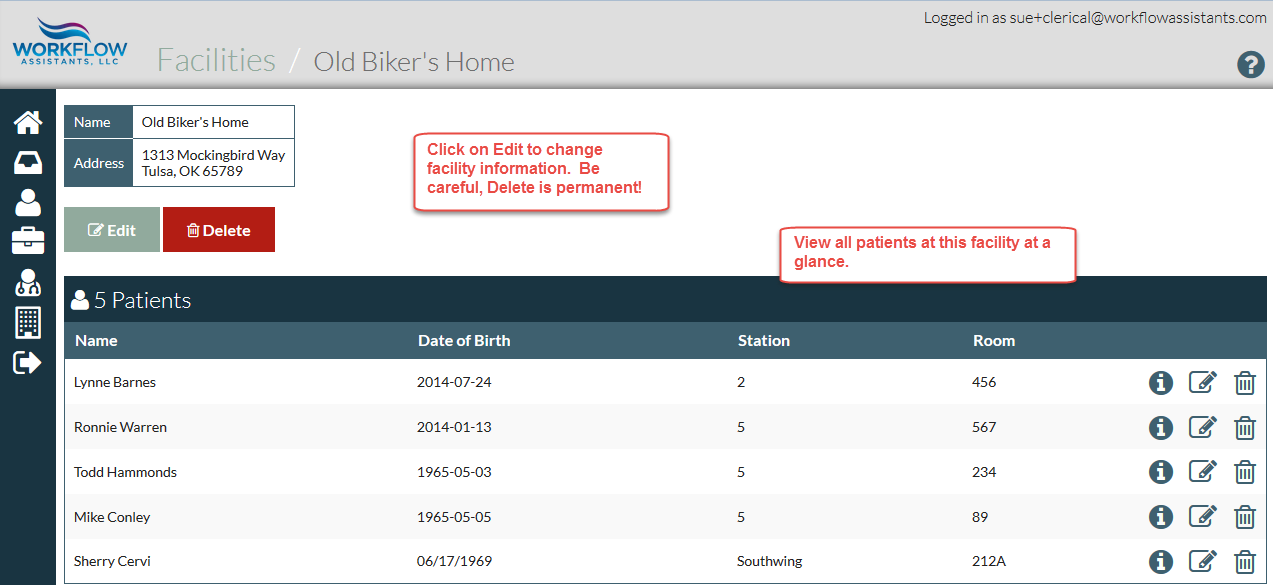
Click on a facility to view or add. Click on New Facility to add a facility. Note that facilities may be added when creating a new order as well.



# Facility data at a glance

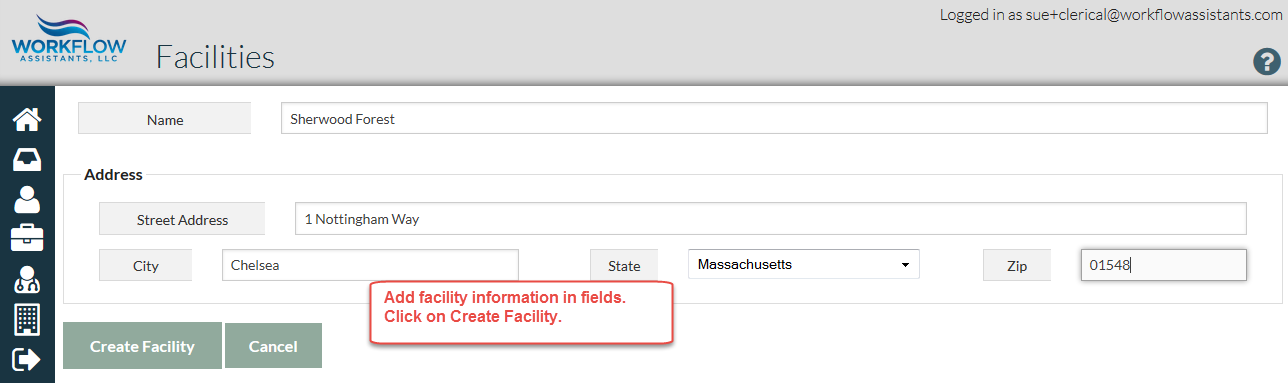
From this screen, the Operator Admin user can:

* Click on Edit to update facility information
* View all patients at this facility at a glance



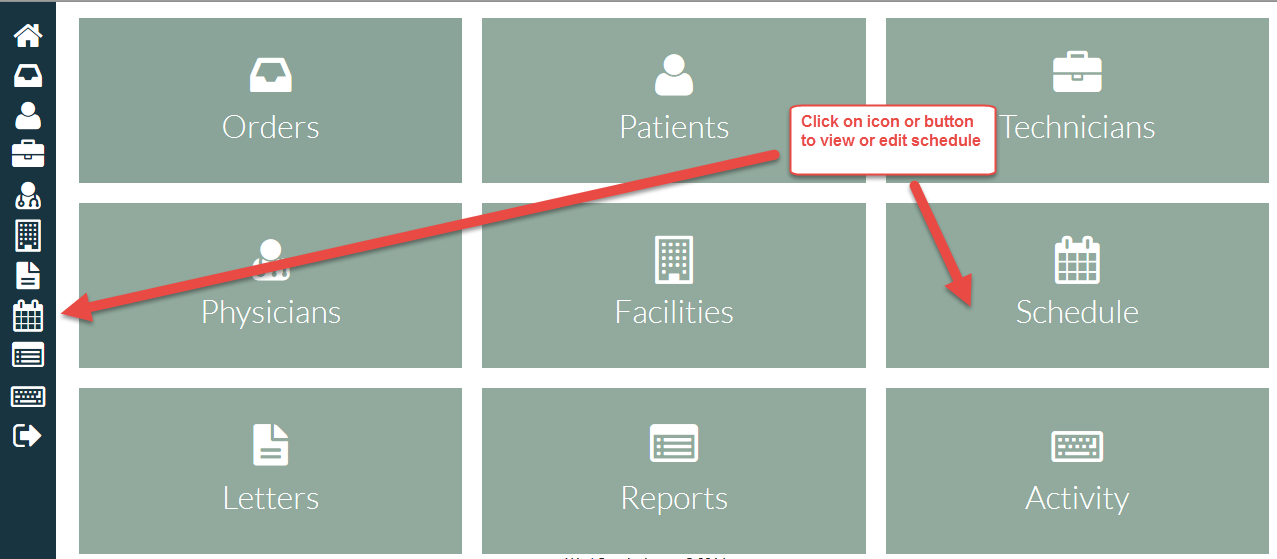
# Adding a facility

Add facility information in the fields. Click on Create Facility.



# Schedule

From this screen, the Operator Admin user can view and edit schedule for all technicians.



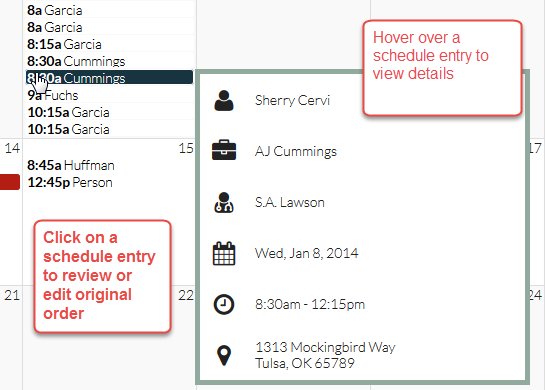
# Viewing schedule

View schedule by day, week or month at a glance. View entire schedule, or select one or more technicians by checking boxes.

# 

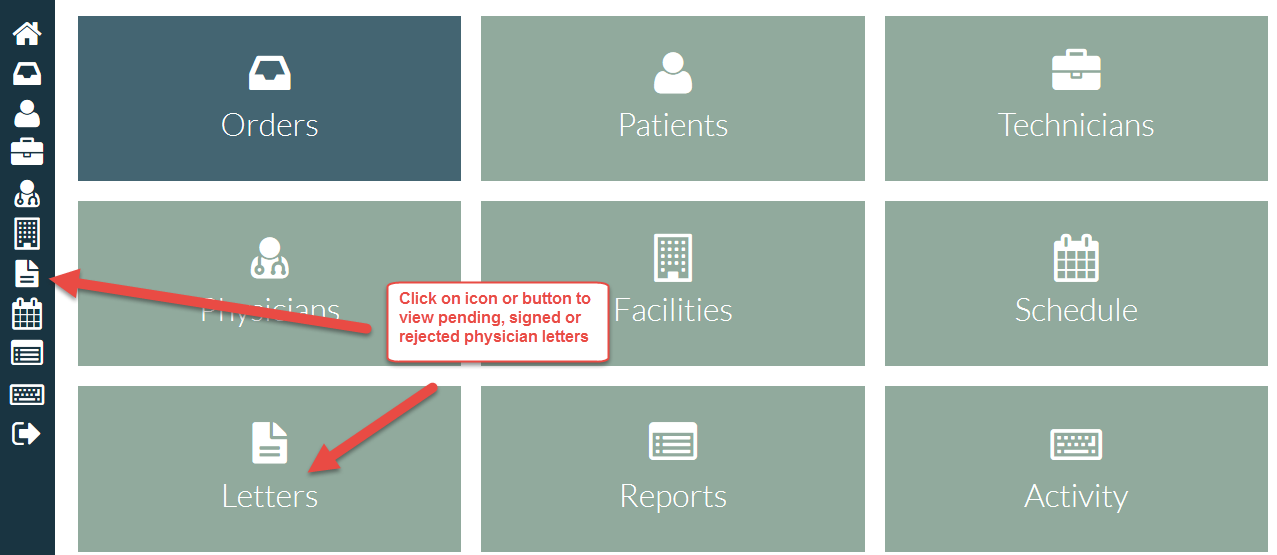
# Schedule details

Hover over a schedule entry to view details. Click on schedule entry to edit.



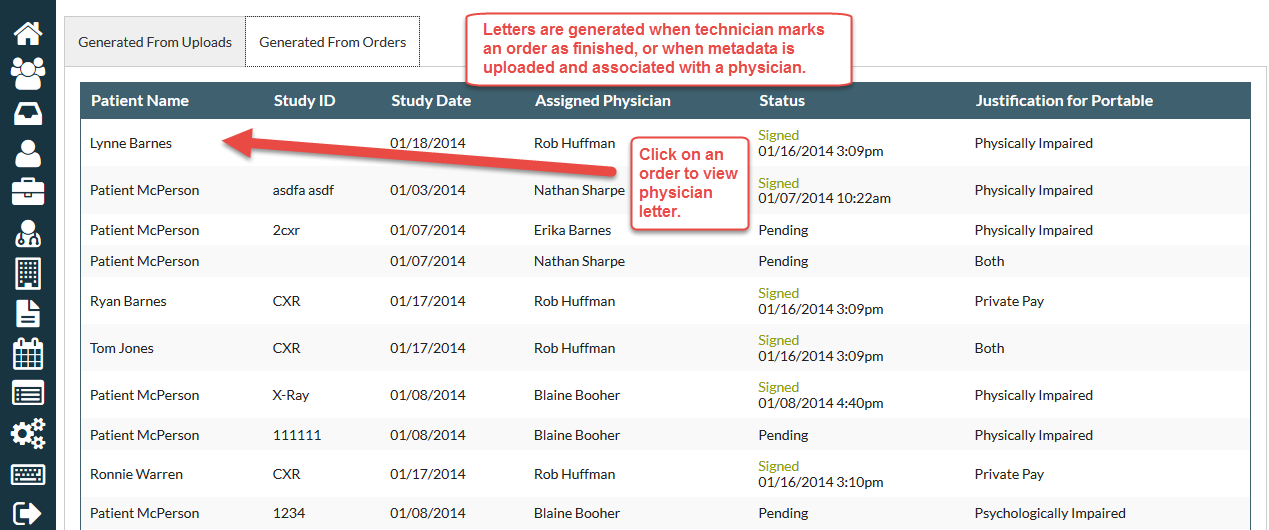
# Letters

View pending, signed or rejected physician letters.



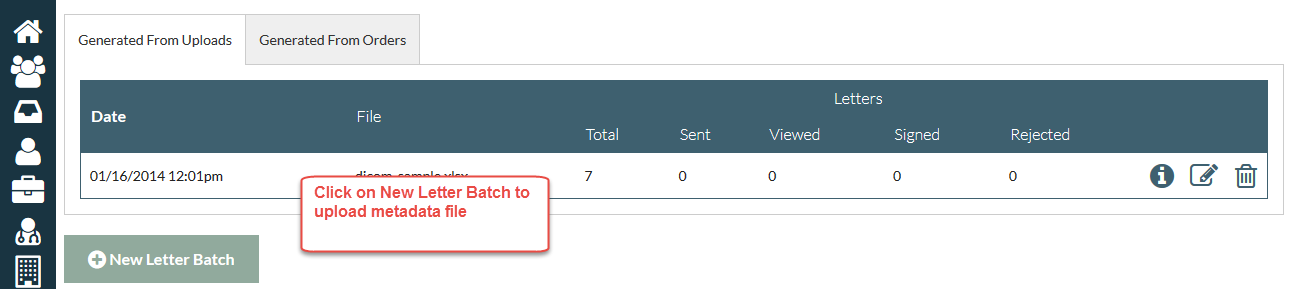
# Viewing letters

Letters are generated when an order is finished by a technician, or when metadata is uploaded and assigned to a physician.

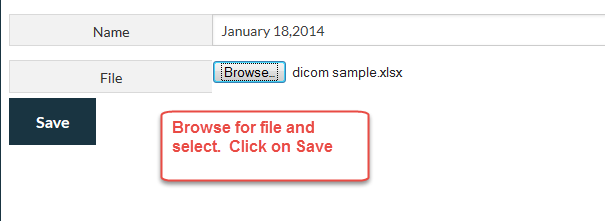


# Generating letters from uploads

Physician letters to be signed may be generated from uploaded metadata.

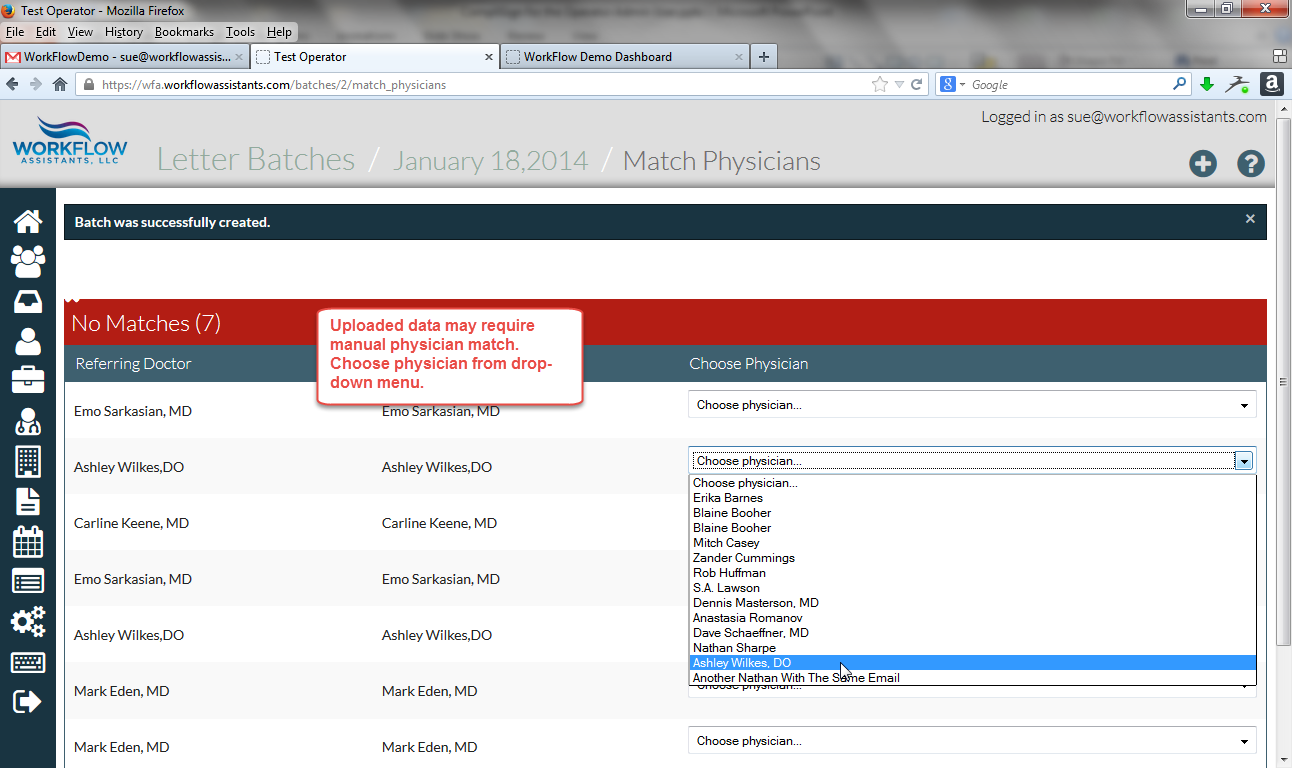


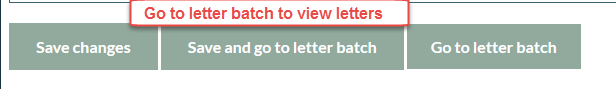
Browse for file and select. Name file and click Save.



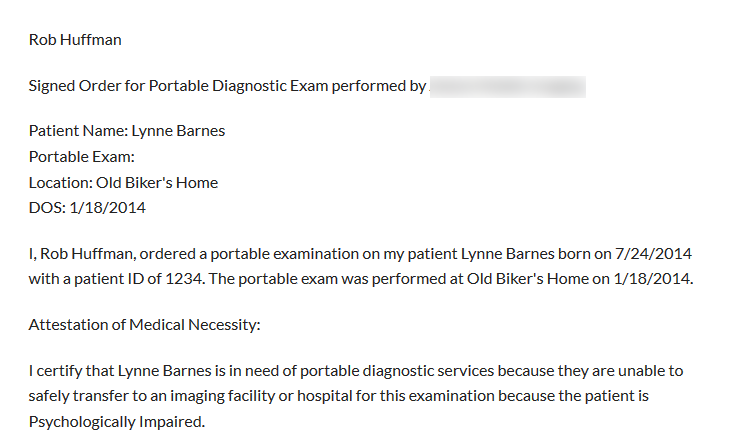
# Matching physician

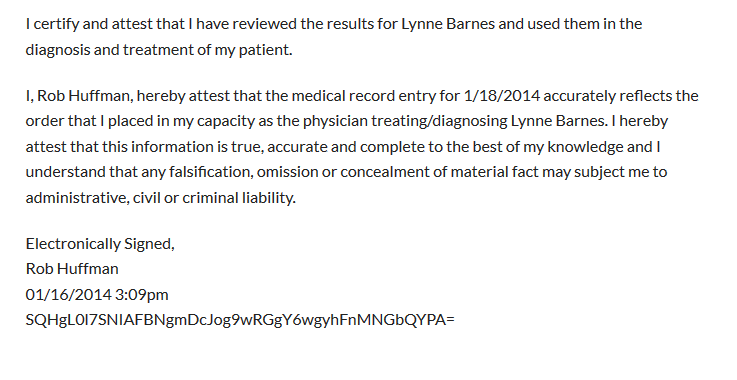
Uploaded data may require manual physician match to generate correct letters. Choose physician from drop-down menu.





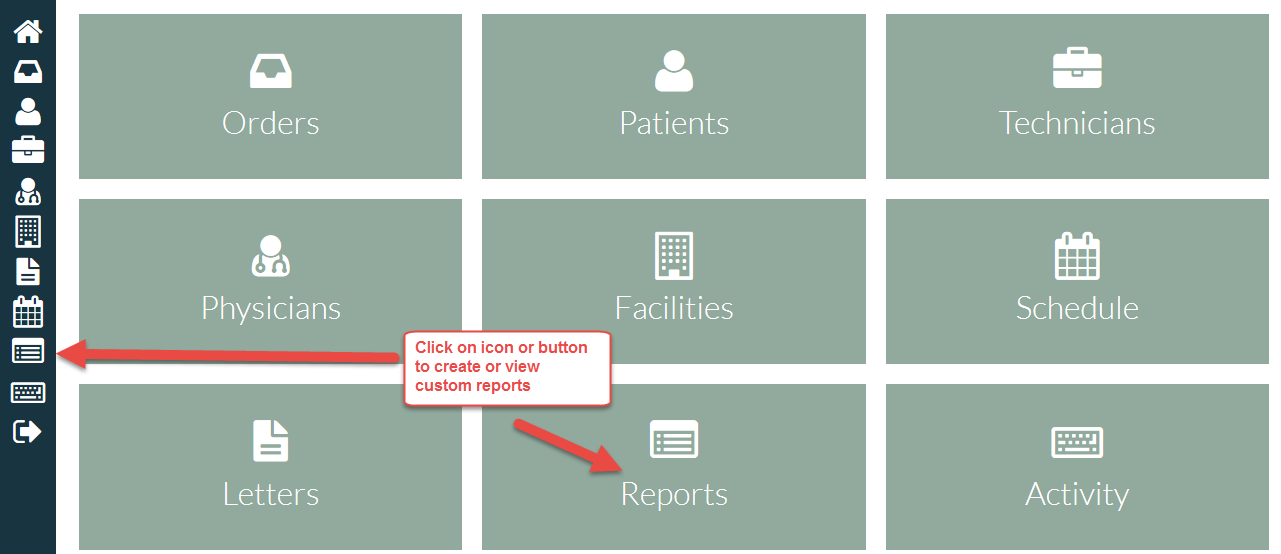
# Viewing Letters



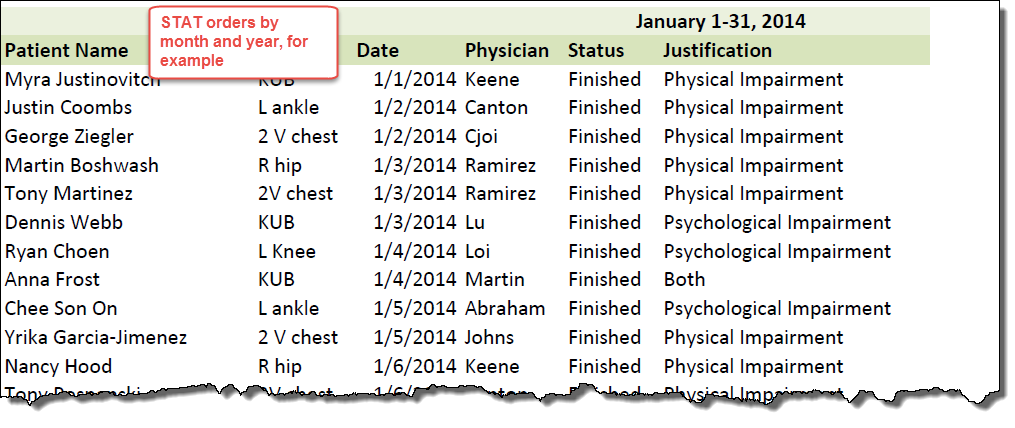


# Reports

Click on an icon or button to create and view custom reports

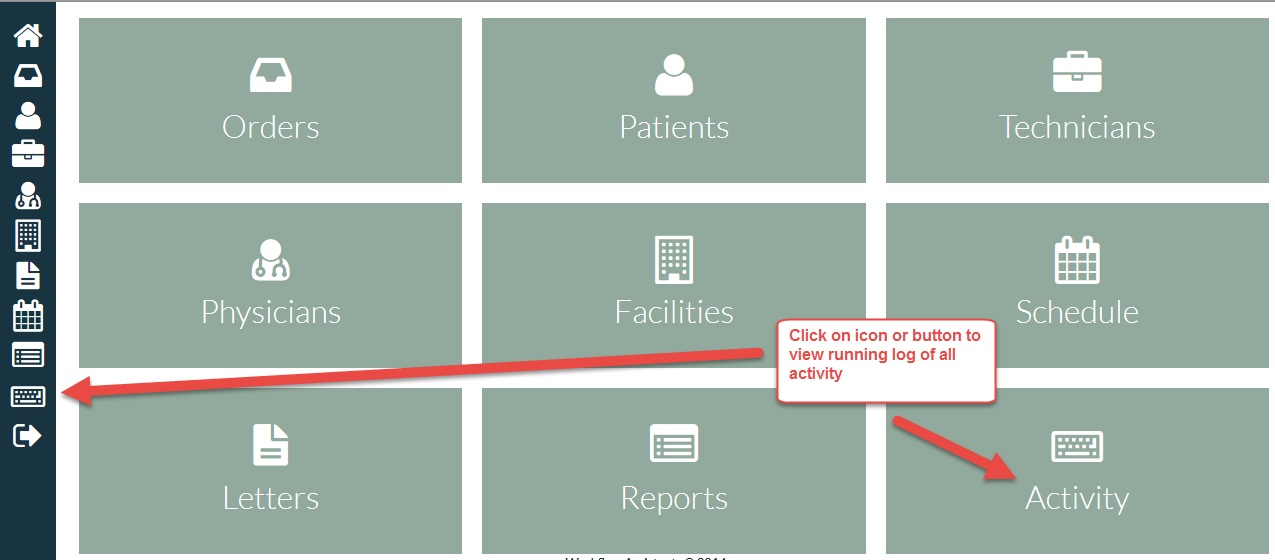


# Sample custom report



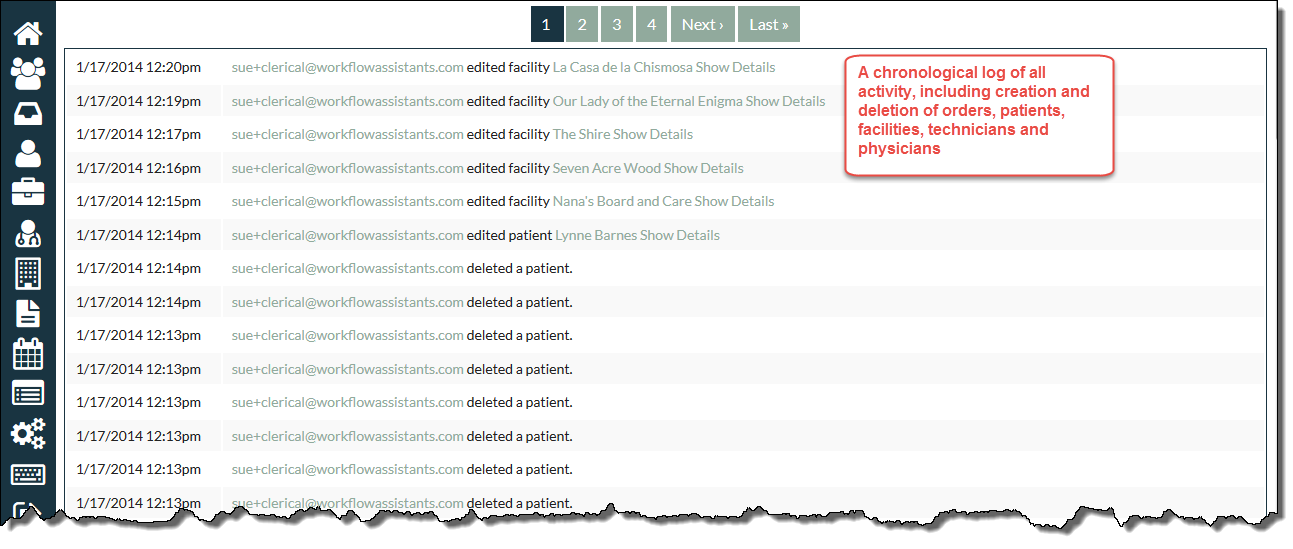
# Activity

Click on icon or button to view running activity log



# Viewing activity log

This screen shows a running, chronologic log of all activity, including creation or deletion of orders, patients, technicians, physicians and facilities.



# Signing out

Click on the icon to sign out from any screen.

