

## Adding & Updating Practitioners

CardiacCare allows for an unlimited number of practitioners to be entered into the system. Practitioners include surgeons, anesthesiologists, etc. If Cedaron Medical, Inc. imports data records for you from past abstractions, we will create any practitioner records seen in the import data. However, as your organization grows or changes, you may have a need to add in additional practitioners or edit the information about an existing practitioner.

Last Name	First Name	NPI	CODE	Active		
BELLE	GERALDO	2325398996		✓		
Bill	Bill/ william	1'24354658	0987654	✓		
Billy	Billy	1234253678		✓		
BLAKE	DANIEL	1932135779		✓		
Brian	Brian	132'4135234657		✓		
Chen	Williard			✓		
CROSS	JOHN	1861459729		✓		
Davis	Pete			✓		
DeVine	David	21549834		✓		
doper	Diane	13526761	07745454	✓		
Duck	Daisy	321		✓		
Esmailian	Fardad	sdaf	asdf	✓		
FOWLER	WILLIAM	1416246462		✓		
Goldblum	Jeff			✓		
Grogert	Victor	125135	0987654	✓		

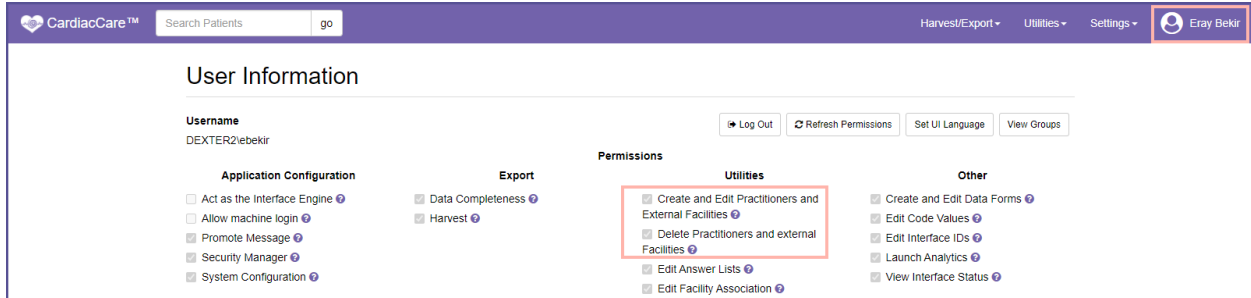
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Practitioner info is configured prior to being used in a data abstraction, so that the user does not have to enter information for every data record. Instead the info is entered in a centralized location. Then when abstracting a case, the user simply selects the practitioner from a drop down, and all the associated fields are automatically populated. This also allows edits to be centralized (for example, if an entry needs correction it can be done in a single place and apply to all associated records).

### Permissions

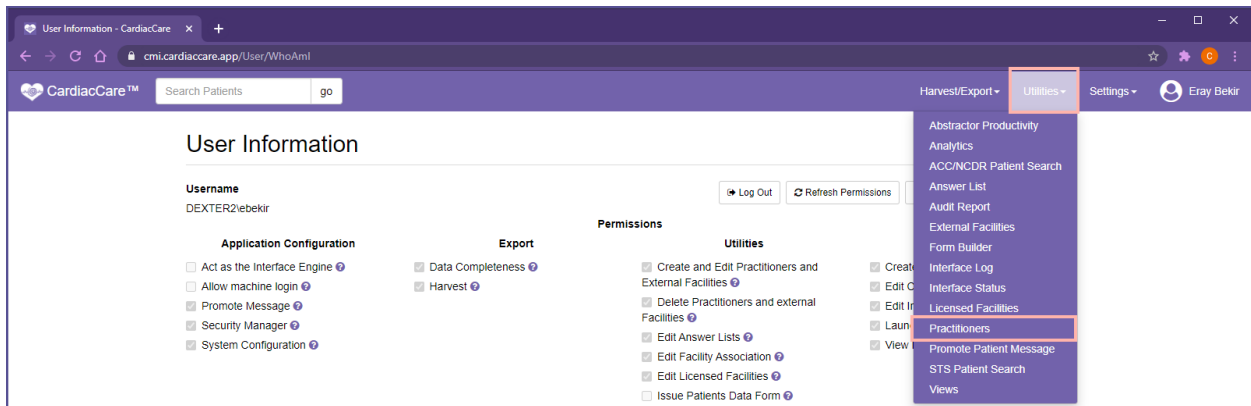
In order to add or edit practitioners, a user must have the **“Create and Edit Practitioners”** permission enabled in the Security Manager. To be able to delete a practitioner, a user must have the **“Delete Practitioners”** permission enabled in the Security Manager.



Enabling the permission adds the “Practitioner” menu item under “Utilities”.

## Practitioner Maintenance

Access the Practitioner Maintenance screen by going in the menu to “Utilities” → “Practitioners”



This screen will display the list of all practitioners which are currently entered into your system, and some basic information about each one. For organizations with many practitioners, a filter option is provided to help filter the displayed list of practitioners.

From this screen, double clicking on an existing practitioner or clicking the paper and pencil icon will allow editing of a practitioner’s information.

Users may sort by a specific column, in ascending or descending order by clicking on a column header: Last Name, First Name, NPI or CODE.

The number of rows displayed at once may be changed by clicking on the rows dropdown at the bottom of the screen.

Clicking on the “+ New Practitioner” button will allow creation of a new practitioner. The screen for creating a new practitioner or editing an existing practitioner is the same, but when editing, the existing information will be pre-filled in.

## Practitioners

Restore Practitioner + New Practitioner

Last Name	First Name	NPI	CODE	Active	
BELLE	GERALDO	2325398996		✓	✎ 🗑
Bill	Bill/ william	1'24354658	0987654	✓	✎ 🗑
Billy	Billy	1234253678		✓	✎ 🗑
BLAKE	DANIEL	1932135779		✓	✎ 🗑
Brian	Brian	132'4135234657		✓	✎ 🗑
Chen	Willard			✓	✎ 🗑
CROSS	JOHN	1861459729		✓	✎ 🗑
Davis	Pete			✓	✎ 🗑
DeVine	David	21549834		✓	✎ 🗑
doper	Diane	13526761	07745454	✓	✎ 🗑
Duck	Daisy	321		✓	✎ 🗑
Esmalian	Fardad	sdaf	asdf	✓	✎ 🗑
FOWLER	WILLIAM	1416246462		✓	✎ 🗑
Goldblum	Jeff			✓	✎ 🗑
Grorgert	Victor	125135	0987654	✓	✎ 🗑

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15 rows
Next

For an example, we are going to add one new practitioner, Jane Smith. They will be an Anesthesiologist and a Physician at two different locations. Start by selecting the “+ New Practitioner” button.

The entry screen will display:

Fields marked with a red asterisk near the label and a red bar near the data input are required. You will not be able to save if these fields are left blank (First and Last Name).

CardiacCare™

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Harvest/Export
Utilities
Settings
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Practitioners / New

## New Practitioner

\* Last Name

\* First Name

Middle Name

Gender

NPI

CODE

TIN

License Number

Employee Number

Active

Onsite

In addition to the fields marked as required, in general, an organization will want to fill in additional fields for the practitioner. Typical fields include:

- **National Provider Identification (NPI)** of the practitioner
- **Tax Identification Number (TIN)** of the practitioner

	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; border: 1px solid red;">NPI</td> <td style="border: 1px solid red;"><input style="width: 85%;" type="text"/></td> </tr> <tr> <td style="border: 1px solid red;">CODE</td> <td style="border: 1px solid red;"><input style="width: 85%;" type="text"/></td> </tr> <tr> <td style="border: 1px solid red;">TIN</td> <td style="border: 1px solid red;"><input style="width: 85%;" type="text"/></td> </tr> </table>	NPI	<input style="width: 85%;" type="text"/>	CODE	<input style="width: 85%;" type="text"/>	TIN	<input style="width: 85%;" type="text"/>
NPI	<input style="width: 85%;" type="text"/>						
CODE	<input style="width: 85%;" type="text"/>						
TIN	<input style="width: 85%;" type="text"/>						

- **Facilities the practitioner is associated with.** A practitioner can be associated with more than one facility. If a practitioner is not associated with a given facility, the practitioner will not be selectable in data forms for procedures at that facility. If a practitioner is not associated with any facility, the practitioner will not be selectable in any data form.
- **Medical Specialty** of the practitioner *in relation to data abstraction*  
*Note: This is not the same as a doctor’s medical specialty (i.e. it is NOT the area of medicine they specialize in)*

- ❖ The Medical Specialty and Facility for the practitioner have to be completed in order for the practitioner to be available  
Associating the practitioner with the correct options will control which drop down lists in the data forms the practitioner appears in. You can assign a practitioner to more than one option.

	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; border: 1px solid red;">Facilities</td> <td style="border: 1px solid red;"><input style="width: 85%;" type="text"/></td> </tr> <tr> <td style="border: 1px solid red;">Medical Specialty</td> <td style="border: 1px solid red;"><input style="width: 85%;" type="text"/></td> </tr> </table>	Facilities	<input style="width: 85%;" type="text"/>	Medical Specialty	<input style="width: 85%;" type="text"/>
Facilities	<input style="width: 85%;" type="text"/>				
Medical Specialty	<input style="width: 85%;" type="text"/>				

For example, if we have the following practitioners and associations:

- Sally Smith → Anesthesiologist
- Joe Dunham → Anesthesiologist, Cardiac Registry Surgeon
- Mitchell Harrison → Cardiac Registry Surgeon
- Edward Garrison → No medical specialty selected

Then in the data forms for the “Surgeon” the following options will appear: Joe Dunham and Mitchell Harrison. In the data forms for “Primary Anesthesiologist” the following options will appear: Joe Dunham and Sally Smith. Note that Edward Garrison will not be selectable in any data form as no medical specialty was selected.

In many cases, the participant ID for a registry is assigned at the facility. However, in some cases, practitioners may have separate participant IDs. If that is the case, then the individual participant IDs can be specified (this is not common).

STS Adult Cardiac Participant ID

STS Congenital Participant ID

STS Thoracic Participant ID

California License Number

New Jersey License Number

**Active** and **Onsite** are checked by default.

In general, this value should not be changed. However, if a practitioner is no longer part of your organization, you can mark the practitioner as not active, which prevents future records from being created for that practitioner. In general, this is a better option than deleting the practitioner, so that you maintain access to historical data, and can re-activate if needed. However, the possibility does exist to delete a practitioner. We strongly recommend contacting Cedaron Support prior to deleting any practitioner.

Keep onsite checked for practitioners who are onsite. Otherwise this can be unchecked.

Employee Number

Active

Onsite

Prefix

After filling out all the data, be sure to select the “**Save**” button at the bottom of the maintenance screen. (Unlike patient records, practitioner maintenance is not automatically saved as each field is modified, but all changes are saved once by pressing the “Save” button.)

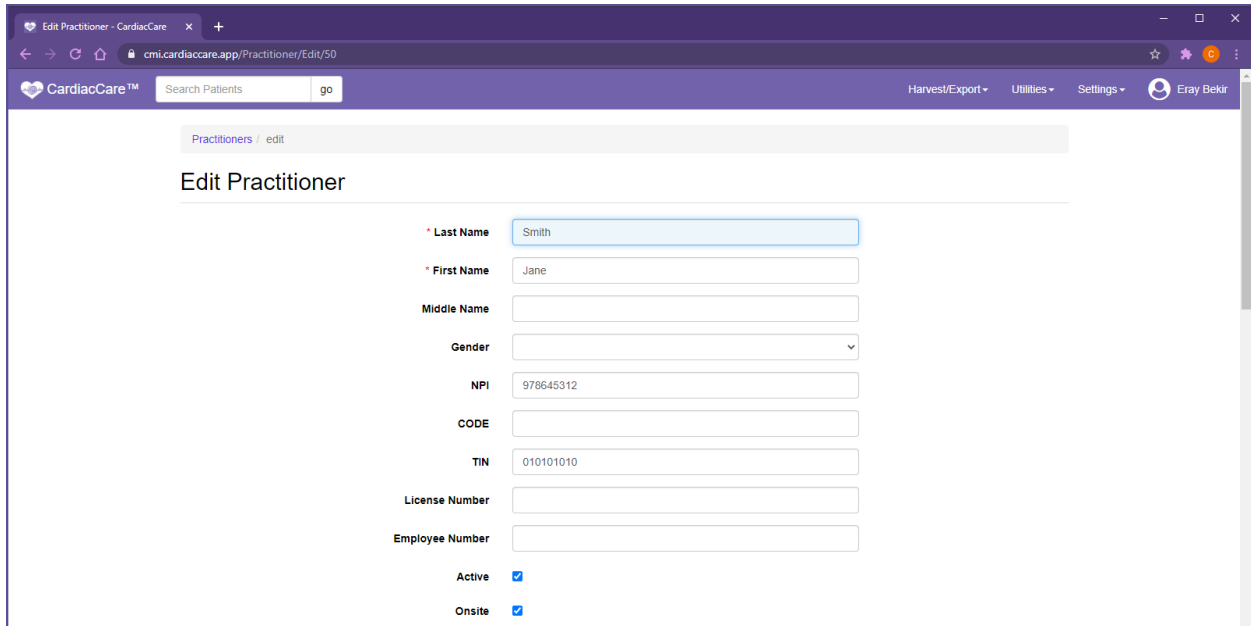
GMC Number

NIH Stroke Scale Examiner Certified

Save

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Here are screenshots of the completed form for Jane Smith. The main thing to notice, is that most of the fields can be left blank – whether they should be is up to your organization:



Practitioners / edit

## Edit Practitioner

\* Last Name

\* First Name

Middle Name

Gender

NPI

CODE

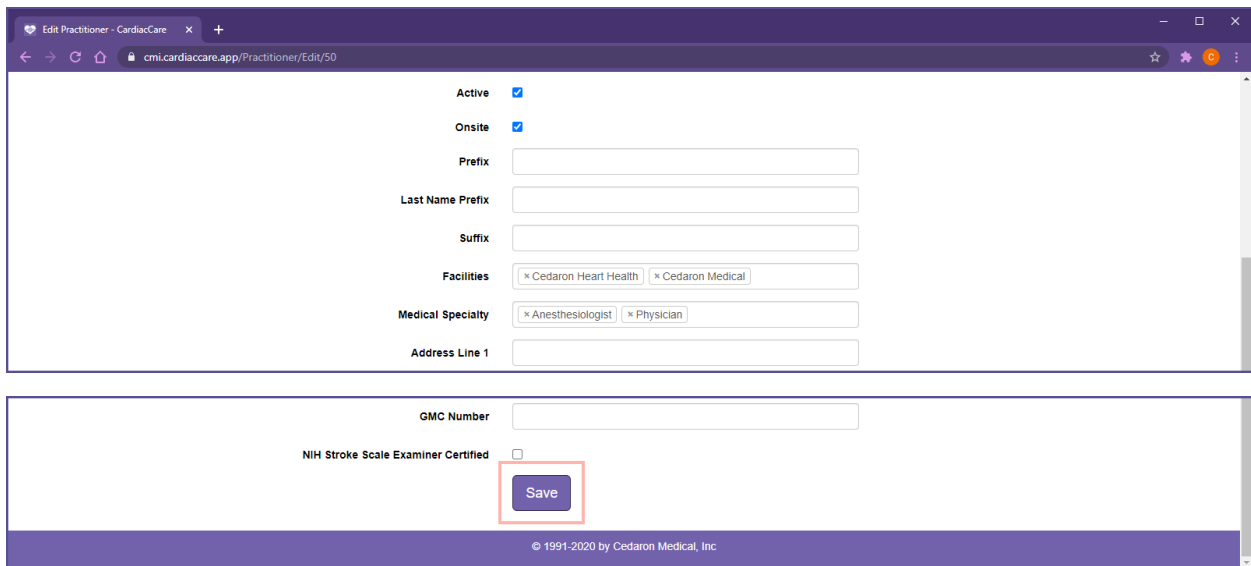
TIN

License Number

Employee Number

Active

Onsite



Active

Onsite

Prefix

Last Name Prefix

Suffix

Facilities

Medical Specialty

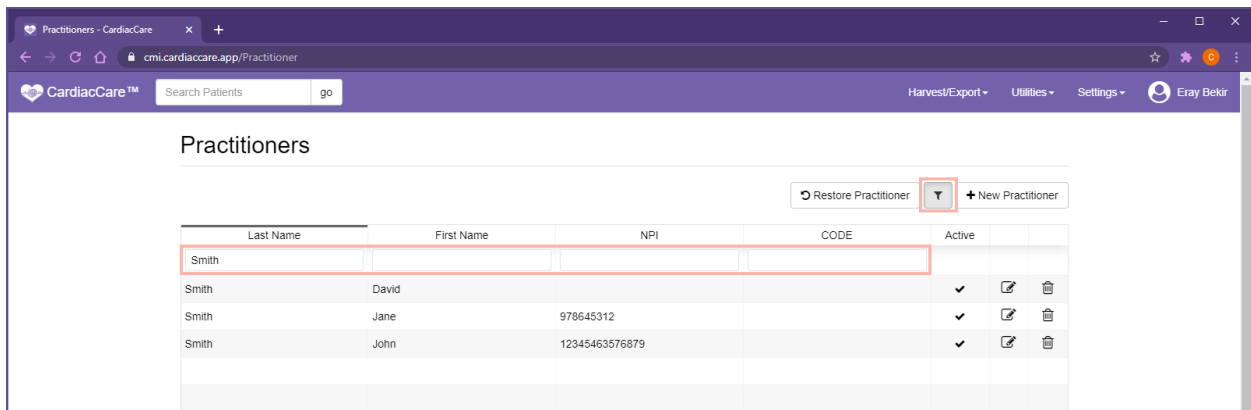
Address Line 1

GMC Number

NIH Stroke Scale Examiner Certified

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Clicking “Save” will create the practitioner and return the user to the Practitioner listing screen:



Practitioners

Last Name	First Name	NPI	CODE	Active		
Smith						
Smith	David			✓	<input type="button" value="edit"/>	<input type="button" value="delete"/>
Smith	Jane	978645312		✓	<input type="button" value="edit"/>	<input type="button" value="delete"/>
Smith	John	12345463576879		✓	<input type="button" value="edit"/>	<input type="button" value="delete"/>

We can filter by any of the first four columns. We will filter by Last Name and type in Smith.

If there are matching criteria they will then load. We see that our new practitioner, Jane Smith is saved in the system.

### Using Practitioner

Once the practitioner is created and associated with the corresponding facilities and medical specialties (drop downs), the practitioner simply has to be selected on a data form, and the corresponding fields for that data form will be pulled into the data form. This minimizes data entry and reduces the chance of error. For example:

The screenshot shows a web application interface for 'Adult Cardiac Anesthesiology'. The form includes several fields with associated dropdown menus. The 'Primary Anesthesiologist Name' field is currently open, displaying a list of practitioners. The list includes '(unspecified)', '(unspecified)', 'Duck, Daisy [321]', and 'Smith, Jane [978645312]'. The 'Smith, Jane' option is highlighted with a red box, indicating it is the selected or intended practitioner for this field. Other fields include 'Anesthesiology Not Accessed' (radio buttons for unspecified, No, Yes), 'Primary Anesthesiologist National Provider Identifier', 'Care Team Model', and 'Pain Score Baseline'.

Tip: If a practitioner is not available as an option on a specific form and field (for example as an Anesthesiologist) go to edit their information in Practitioners and make sure they have the correct Medical Specialty associated with them.