

MEDITECH Expanse Audit Trail Related Settings (All Products)

Overview

This document lists the settings located in the Customer-Defined Parameters and Toolbox Parameters that may impact audit trails within the MEDITECH system. Please note, all Audit Trail related parameters are also listed in each main parameter document located on the [Parameters page](#).

Audit Trail related parameters are denoted with an **[Audit Trail]** label and include recommendations regarding availability of audit trail data. To support accurate tracking, compliance, and data integrity, MEDITECH based these recommendations on a review of customer settings, workflow, and utilization. Audit Trail related parameters require additional review before setting/editing and may also require technical and/or supervisory review. Toolbox parameters are available for reference only and are set by MEDITECH after consultation with end users. Audit Trail related parameters may also include **[High Impact]**, **[High Impact Ordering]**, **[Performance]**, and/or **[USCDI]** ramifications, which will be noted below. To modify any parameter, please open a case and provide the necessary change control approval to your support specialist.

Table of Contents

[Ambulatory Care](#)

- [Emergency Department Management](#)
 - [Toolbox Parameters](#)
 - [Main](#)
 - [Customer Defined Parameters](#)
 - [Discharge](#)

[Patient Identification and Scheduling](#)

- [Scanning and Archiving](#)
 - [Toolbox Parameters](#)
 - [Echart 1](#)

[Patient Care Management](#)

- [Patient Care System](#)
 - [Toolbox Parameters](#)
 - [MAR 1](#)
 - [File Maintenance](#)

[Clinical](#)

- [Imaging and Documentation Management](#)
 - [Toolbox Parameters](#)
 - [Image Data](#)

- [File Maintenance](#)
 - [Report/Order Purge](#)
 - [Site Specific Purge](#)
 - [Laboratory - Blood Bank, Laboratory Information Systems, Anatomical Pathology](#)
 - [Toolbox Parameters](#)
 - [BBK - Page 2](#)
 - [LIS - Page 5](#)
 - [Customer Defined Parameters](#)
 - [LIS - Page 5](#)
 - [LIS - Page 8](#)
 - [Pharmacy](#)
 - [Toolbox Parameters](#)
 - [File Maintenance](#)
 - [Purge/Archive](#)
 - [Customer-Defined Parameters](#)
 - [Defaults](#)

[Decision Support](#)

- [Quality Management](#)
 - [Toolbox Parameters](#)
 - [Maintenance](#)
- [Risk Management](#)
 - [Toolbox Parameters](#)
 - [Maintenance](#)
- [Surveillance](#)
 - [Toolbox Parameters](#)
 - [Toolbox Parameters](#)

[Financial Management](#)

- [Materials Management](#)
 - [Toolbox Parameters](#)
 - [Purge Delays](#)

[Other](#)

- [Management Information Systems](#)
 - [Toolbox Parameters](#)
 - [MIS MAT - Main](#)
 - [MIS MAT- External](#)
 - [MIS NPR- General 2](#)
 - [MIS NPR - Financial 2](#)

Ambulatory Care Audit Trail Settings

Emergency Department Management Toolbox Parameters

Main

Parameter	Function	Recommended Setting	Available Settings
Electronic Chart - Patient Visit Report [High Impact] [Audit Trail]	Enter the document or documents to be used for eChart. If left blank, there are no documents used for the eChart. [If a document is removed from here, it will no longer archive for ED patients.] [If left blank, documentation will not be sent to eChart.]	MEDITECH recommends that an ED Audit Report and an ED Visit Summary Report be included.	Lookup: MIS Medical Record Document Dictionary
Electronic Chart - Discharge Packet [High Impact] [Audit Trail]	Enter the name of the discharge packet sent to eChart for patients discharged from EDM. If left blank, there is no name for the discharge packet sent to the eChart for patients discharged from EDM. [If a document is removed from here, it will no longer be archived for ED patients.] [If left blank, the Discharge Packet will not be sent to eChart.]	MEDITECH recommends that an EDM Discharge Packet Medical Record Document be listed.	Lookup: MIS Medical Record Document Dictionary
ED Information Exchange Report [Audit Trail]	Enter the name of the ED Information Exchange Report sent to the eChart for patients in EDM. If left blank, no ED Information Exchange Report will be sent to the eChart. [If left blank, the ED Information Exchange Report will not be sent to eChart.]	MEDITECH recommends that an ED Information Exchange Report be listed if using the ED Information Exchange functionality.	Lookup: MIS Medical Record Document Dictionary, for entries with a source of ED Information Exchange Report

Emergency Department Management Customer Defined Parameters

Discharge

Parameter	Function	Recommended Setting	Available Settings
Queries for Discharge History	Enter queries that are documented on discharge forms that you want to appear in the Discharge History Audit.	No Recommended Setting	Lookup to the Query Dictionary

<p>[Audit Trail]</p>	<p>Queries associated with the Discharge Customer Defined Screen (CDS) page in the Discharge Routine automatically appear in the Discharge History and do not need to be defined here.</p> <p>[If left blank, queries on discharge forms will not appear in the Discharge History Audit. Queries associated with the Discharge Customer Defined Screen page in the Discharge Routine automatically appear in the Discharge History and do not need to be defined here.]</p>		
-----------------------------	--	--	--

Patient Identification and Scheduling Audit Trail Settings

Scanning and Archiving Toolbox Parameters

Echart 1

Parameter	Function	Recommended Setting	Available Settings
<p>SCA Report File Maintenance Days</p> <p>[High Impact]</p> <p>[Audit Trail]</p>	<p>Enter the number of days that elapse before the system automatically purges SCA reports. When left blank, the default is 120 days.</p> <p>[Data contained in the MRM reports will no longer be accessible once the number of days defined is met.]</p>	<p>MEDITECH recommends leaving this field blank or setting it to a value higher than 120 days.</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> ● 0-999 ● Blank = 120

Patient Care Management Audit Trail Settings

Patient Care System Toolbox Parameters

MAR 1

Parameter	Function	Recommended Setting	Available Settings
<p>Time to use for scanned docs</p> <p>[Audit Trail]</p>	<p>This parameter determines the time used for scanning medication administrations.</p> <p>To use the current date/time as the administration date/time when scanning medications, enter "Current." To use the medications scheduled date/time as the administration date/time when scanning medications, enter "Scheduled" or leave blank.</p>	<p>No Recommended Setting</p>	<ul style="list-style-type: none"> ● Current ● Scheduled/Blank

	<p><i>Note: This field also exists in other clinical Toolbox Parameters, but does not impact PCS functionality.</i></p> <p>[With this field set to “Scheduled/Blank” the audit trail will not reflect the actual date/time the medication was scanned.]</p>		
<p>Time to use for manual docs</p> <p>[Audit Trail]</p>	<p>This parameter determines the time used for manually documenting medication administrations.</p> <p>To use the current date/time as the administration date/time when manually documenting medications, enter “Current.” To use the medications scheduled date/time as the administration date/time when manually documenting medications, enter “Scheduled” or leave blank.</p> <p><i>Note: This field also exists in other clinical Toolbox Parameters, but does not impact PCS functionality.</i></p> <p>[With this field set to “Scheduled/Blank” an audit trail will not display the actual date/time the medication was documented.]</p>	No Recommended Setting	<ul style="list-style-type: none"> ● Current ● Scheduled/Blank
<p>Time to use for reassessment docs</p> <p>[Audit Trail]</p>	<p>This parameter determines the time used for documenting reassessment documentation.</p> <p>To use the current date/time as the documentation date/time when documenting overdue reassessments, enter “Current.” To use the reassessment scheduled date/time as the documentation date/time when documenting overdue reassessments, enter “Scheduled” or leave blank.</p> <p><i>Note: This field also exists in other clinical Toolbox Parameters, but does not impact EDM functionality.</i></p> <p>[With this field set to “Scheduled/Blank” the audit trail will not display the actual date/time the reassessment was documented.]</p>	No Recommended Setting	<ul style="list-style-type: none"> ● Current ● Scheduled/Blank

File Maintenance

Parameter	Function	Recommended Setting	Available Settings
<p>Uncaptured Monitor Data Purge (Days After Discharge)</p> <p>[High Impact]</p> <p>[USCDI]</p> <p>[Audit Trail]</p>	<p>Enter the number of days after discharge that a patient's unsaved monitor data should be purged from the system.</p> <p>[MEDITECH's programming team may need to review for a space analysis or initiate the purging of data depending on the requested change.]</p> <p>[If this parameter is left blank, the default is 99 days which means the data will purge after 99 days and will not display on an audit trail.]</p>	<p>MEDITECH recommends setting this field to "14" or lower.</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> • 1-99 • Blank = 99
<p>Electronic Chart Patient Visit Report</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>Define the documents that the system will send to the eChart.</p> <p>Only documents that use PCS Patient Report as the Document Source should be entered here.</p> <p>[MEDITECH's programming team may need to review for a space analysis or initiate the purging of data depending on the requested change.]</p> <p>[If there are too many Medical Record Documents, and they are not built in accordance with PCS Best Practice, it can cause performance issues.]</p> <p>[If blank, the Patient Visit Report will not be sent to the eChart and therefore, there will be no stored copy of this report for auditing.]</p>	<p>Refer to the following Best Practice document for MEDITECH's recommendations.</p>	<p>Lookup: MIS Medical Record Document Dictionary</p>
<p>Electronic Chart Discharge Packet</p> <p>[Audit Trail]</p>	<p>Enter the discharge document report that will be sent to the eChart. Only one entry can be selected for this field.</p> <p>Only documents that use PCS Discharge Packet as the Document Source should be entered here.</p> <p>[If blank, the Discharge Packet will not be sent to the eChart and therefore, there will be no stored copy of this report for auditing.]</p>	<p>MEDITECH recommends that a PCS Discharge Document report be listed.</p>	<p>Lookup: MIS Medical Record Document Dictionary</p>

Clinical Audit Trail Parameters

Imaging and Documentation Management Toolbox Parameters

Image Data

File Maintenance

- All file maintenance parameters determine how long data is maintained in IDM before being purged. Once this data is purged, it cannot be recovered. Setting file maintenance and purge parameters appropriately will help ensure that all relevant data, including statistics, are available for the duration the hospital requires.
- To save disk space in your system, MEDITECH recommends specific parameter values for file maintenance. However, your healthcare organization can define specific values that suit its storage needs.

Parameter	Function	Recommended Setting	Available Settings
<p>Audit Trail Purge (Days)</p> <p>[High Impact]</p> <p>[Audit Trail]</p>	<p>Enter the number of days that you want IDM to retain orders on the audit trail before the system purges them. After the system transmits or prints an order, IDM indicates the orders that were successfully transmitted and received on the Audit Trail Report. IDM also saves edits to the orders on the audit trail.</p> <p>This parameter also affects the following routines:</p> <ul style="list-style-type: none"> • History Input Log • Print Order Audit Trail • Record Location Audit Trail • Signed Report Status Edit List • Inventory Item Deducted List • Inventory Item Reject List <p>[Controls how long the Order audit trail information is available in IDM.]</p> <p>[Once the audit trail purges, it will no longer be available within the system.]</p>	<p>MEDITECH recommends setting this to "45."</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> • 1-999

Report/Order Purge

- Order and Report purge parameters determine how long patient data is maintained within IDM. Once a report or order has purged, it is not possible to be reinstated within IDM.
- Report/order purge parameters should be lowered incrementally. This will help ensure that other applications (such as EMR) do not receive large amounts of transactions. Increasing report/order purge parameters should accompany a space evaluation performed by a programmer.

Parameter	Function	Recommended Setting	Available Settings
<p>Report Purge:</p> <p>Months Default</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[EHI]</p> <p>[Audit Trail]</p>	<p>Enter the number of months that you want to retain IDM reports before the system purges this information. IDM uses the value you enter at this parameter as the default value for your entire health care organization.</p> <p>You can override this default value for specific departments at the Department (Report Purge) parameter. You can view purged IDM reports that have valid EMR IDs in Clinical Review.</p> <p>If left blank, reports will not purge.</p> <p>[This parameter involves purging IDM reports. Once purged, the reports will no longer be available in the CHART.]</p> <p>[If there are too many reports purging, the midnight run can run for longer periods of time. It is recommended that this parameter be dropped in increments of one month at a time to allow monitoring of the Midnight Run.]</p> <p>[Once the report purges, the audit trail will purge with it, and no longer be available in IDM. The report and audit trail would still be available in the eChart if set up accordingly.]</p>	<p>MEDITECH recommends leaving this field blank or setting it to “999.”</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> ● 1-999 ● Blank = Reports will never purge
<p>Report Purge:</p> <p>Department</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[EHI]</p> <p>[Audit Trail]</p>	<p>Enter the departments for which you want to define specific report purge and archiving values. The values you enter for these departments override the default values you entered at the Report Purge (Months) Default and Archive (Dft)? Reports parameters.</p> <p>If blank, we look to the Report Purge: Months Default setting.</p> <p>[This parameter involves purging IDM reports. Once purged, the reports will no longer be available in the CHART.]</p> <p>[If there are too many reports purging, the midnight run can run for longer periods of time. It is recommended that this parameter be dropped in increments of one month at a time to allow monitoring of the Midnight Run.]</p>	<p>No Recommended Setting</p>	<p>Lookup: IDM Department Dictionary</p>

	<p>[Once the report purges, the audit trail will purge with it, and no longer be available in IDM. The report and audit trail would still be available in the E-Chart if set up accordingly.]</p>		
<p>Report Purge:</p> <p>Months</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>Enter the number of months that you want IDM to retain reports for a specific department before IDM purges this information. The value you enter at this parameter for this department overrides the value you entered at the Report Purge (Months) Default parameter.</p> <p>If left blank, reports will not purge.</p> <p>[This parameter involves purging IDM reports. Once purged, the reports will no longer be available in the CHART.]</p> <p>[If there are too many reports purging, the midnight run can run for longer periods of time. It is recommended that this parameter be dropped in increments of one month at a time to allow monitoring of the Midnight Run.]</p> <p>[Once the report purges, the audit trail will purge with it, and no longer be available in IDM. The report and audit trail would still be available in the E-Chart if set up accordingly.]</p>	<p>MEDITECH recommends leaving this field blank or setting it to “999.”</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> ● 1-999 ● Blank = Reports will never purge
<p>Report Purge:</p> <p>External Reports</p> <p>Months</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>Enter the number of months that you want IDM to retain external medical summary (XMS) reports for a specific status before IDM purges this information. The value you enter at this parameter for this department overrides the value you entered at the Months (External Reports) parameter.</p> <p>If left blank, reports will not purge.</p> <p>[This parameter involves purging IDM reports. Once purged, the reports will no longer be available in the CHART.]</p> <p>[If there are too many reports purging, the midnight run can run for longer periods of time. It is recommended that this parameter be dropped in increments of one month at a time to allow monitoring of the Midnight Run.]</p> <p>[Once the report purges, the audit trail will</p>	<p>MEDITECH recommends leaving this field blank or setting it to “999.”</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> ● 1-999 ● Blank = Reports will never purge

	<p>purge with it, and no longer be available in IDM. The report and audit trail would still be available in the E-Chart if set up accordingly.]</p> <p>DISCLAIMER: This is currently a place holder, as complete functionality has not yet been coded.</p>		
<p>Order Purge:</p> <p>Days Default</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>Relates to how long default order information is available within IDM before it is purged.</p> <p>Enter the number of days after a technologist or provider performs an exam (that is, the service date) that you want IDM to purge the orders. IDM uses this parameter for all orders in your healthcare organization. Orders must reach their purge statuses before IDM can purge them. You can use the Department (Order Purge) or Category (Order Purge) parameters to override this value for specific departments or categories.</p> <p>If left blank, orders will not purge.</p> <p><i>Note: You can enter up to 9999 days at this parameter. Orders with associated follow-up letters (for example, mammography) must remain in IDM for the number of weeks or months defined for that letter in the Follow-up Dictionary. For example, a procedure defined with a 12 month follow-up letter requires an order purge parameter of at least 365 days. If you purge the order, letters do not print.</i></p> <p>[Effect on ADM Purging: You can purge a patient account in ADM only after the system purges all orders for the account in IDM.]</p> <p>[If there are too many orders purging, the midnight run can run for longer periods of time. It is recommended that this parameter be dropped in increments of 30 days at a time to allow monitoring of the Midnight Run.]</p> <p>[Once the order purges, the audit trail will purge with it, and no longer be available in IDM. The order audit trail would still be available in the E-Chart if set up accordingly.]</p>	<p>MEDITECH recommends leaving this field blank or setting it to “9999.”</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> • 1-9999 • Blank = Orders will never purge
<p>Order Purge:</p> <p>Department</p>	<p>Enter the departments for which you want to define specific order purge and archiving criteria. The values you enter for these departments</p>	<p>No Recommended Setting</p>	<p>Lookup: IDM Department Dictionary</p>

<p>[High Impact]</p> <p>[Audit Trail]</p>	<p>override the default values you entered at the Order Purge (Days) Default, Sts (Order Purge Default), and Archive (Dft)? (Order Purge) parameters.</p> <p>[Determines eligibility for Orders to purge from IDM.]</p> <p>[Once the order purges, the audit trail will purge with it, and no longer be available in IDM. The order audit trail would still be available in the E-Chart if set up accordingly.]</p>		
<p>Order Purge:</p> <p>Department - Days</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>Enter the number of days after an exam is performed (that is, the service date) that you want IDM to purge orders.</p> <p>This value overrides the value you entered at the Order Purge (Days) Default and the Arc? (Order Purge - Department) parameters for this specific category only. Orders must reach their purge statuses before IDM can purge them.</p> <p>The value you enter at this parameter overrides the value you entered at the Days - (Order Purge - Department) parameter.</p> <p>If left blank, orders will not purge.</p> <p>[Effect on ADM Purging: You can purge a patient account in ADM only after the system purges all orders for the account in IDM.]</p> <p>[If there are too many orders purging, the midnight run can run for longer periods of time. It is recommended that this parameter be dropped in increments of 30 days at a time to allow monitoring of the Midnight Run.]</p> <p>[Once the order purges, the audit trail will purge with it, and no longer be available in IDM. The order audit trail would still be available in the E-Chart if set up accordingly.]</p>	<p>MEDITECH recommends leaving this field blank or setting it to "9999."</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> ● 1-999 ● Blank = Orders will never purge
<p>Order Purge:</p> <p>Category</p> <p>[High Impact]</p>	<p>Enter the categories for which you want to define specific order purge and archiving criteria.</p> <p>The values you enter for these categories override the default values you entered at the Order Purge (Days) Default , Sts (Order Purge</p>	<p>No Recommended Setting</p>	<p>Lookup: IDM Category Dictionary</p>

<p>[Audit Trail]</p>	<p>Default) and Archive (Dft)? (Order Purge) parameters.</p> <p>The value you enter at this parameter overrides the value you entered at the Department (Order Purge) parameter.</p> <p>[Determines eligibility for Orders to purge from IDM.]</p> <p>[Once the order purges, the audit trail will purge with it, and no longer be available in IDM. The order audit trail would still be available in the E-Chart if set up accordingly.]</p>		
<p>Order Purge:</p> <p>Category - Days</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>Enter the number of days after an exam is performed (that is, the service date) that you want IDM to purge orders.</p> <p>This value overrides the value you entered at the Order Purge (Days) Default and the Arc? (Order Purge - Department) parameters for this specific category only. Orders must reach their purge statuses before IDM can purge them.</p> <p>The value you enter at this parameter overrides the value you entered at the Days - (Order Purge - Department) parameter.</p> <p>If left blank, orders will not purge.</p> <p>[Effect on ADM Purging: You can purge a patient account in ADM only after the system purges all orders for the account in IDM.]</p> <p>[If there are too many orders purging, the midnight run can run for longer periods of time. It is recommended that this parameter be dropped in increments of 30 days at a time to allow monitoring of the Midnight Run.]</p> <p>[Once the order purges, the audit trail will purge with it, and no longer be available in IDM. The order audit trail would still be available in the E-Chart if set up accordingly.]</p>	<p>MEDITECH recommends leaving this field blank or setting it to "9999."</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> ● 1-999 ● Blank = Orders will never purge
<p>Order Purge:</p> <p>Category - Status</p>	<p>Enter the status orders must reach this specific category before IDM can purge them. IDM purges orders depending upon the:</p> <ul style="list-style-type: none"> ● Order status 	<p>If archiving orders from specific categories, MEDITECH recommends setting this field to "R -</p>	<ul style="list-style-type: none"> ● L - Logged ● I - In Process ● T - Taken ● C - Cancelled

<p>[High Impact]</p> <p>[Audit Trail]</p>	<ul style="list-style-type: none"> ○ L - Logged ○ I - In Process ○ T - Taken ○ C - Cancelled ○ R - Resulted ● Number of days that have elapsed since the service date <p>The value you enter at this parameter overrides the default value you entered at the Sts (Order Purge Default) parameter.</p> <p><i>Note: IDM does not purge orders until they reach their purge status, regardless of the number of days that have elapsed since the service date.</i></p> <p>[Determines eligibility for Orders to purge from IDM.]</p> <p>[Once the order purges, the audit trail will purge with it, and no longer be available in IDM. The order audit trail would still be available in the eChart if set up accordingly.]</p>	<p>Resulted”</p>	<ul style="list-style-type: none"> ● R - Resulted
---	---	------------------	--

Site Specific Purge

Parameter	Function	Recommended Setting	Available Settings
<p>Months Default</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[EHI]</p> <p>[Audit Trail]</p>	<p>For the defined site, enter the number of months that you want to retain IDM reports before the system purges this information. IDM uses the value you enter at this parameter as the default value for your entire healthcare organization.</p> <p>You can override this default value for specific departments at the Department (Report Purge) parameter. You can view purged IDM reports that have valid EMR IDs in Clinical Review.</p> <p>If left blank, reports will not purge.</p> <p>[Determines how long reports are available within the system including access via EMR.]</p> <p>[If there are too many reports purging, the midnight run can run for longer periods of time. It is recommended that this parameter be dropped in increments of one month at a time to allow monitoring of the Midnight Run.]</p>	<p>MEDITECH recommends leaving this field blank or setting it to “999.”</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> ● 1-999 ● Blank = Reports will never purge

	<p>[Once the report purges, the audit trail will purge with it, and no longer be available in IDM. The report and audit trail would still be available in the eChart if set up accordingly.]</p>		
<p>Department</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>For the defined site, enter the departments for which you want to define specific report purge and archiving values. The values you enter for these departments override the default values you entered at the Report Purge (Months) Default and Archive (Dft)? Reports parameters.</p> <p>[Determines how long reports are available within the system.]</p> <p>[If there are too many reports purging, the midnight run can run for longer periods of time. It is recommended that this parameter be dropped in increments of one month at a time to allow monitoring of the Midnight Run.]</p> <p>[Once the report purges, the audit trail will purge with it, and no longer be available in IDM. The report and audit trail would still be available in the eChart if set up accordingly.]</p>	No Recommended Setting	Lookup: IDM Department Dictionary
<p>Department - Months</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>For the defined site and department, enter the number of months that you want to retain IDM reports before the system purges this information. IDM uses the value you enter at this parameter as the default value for your entire healthcare organization.</p> <p>You can override this default value for specific departments at the Department (Report Purge) parameter. You can view purged IDM reports that have valid EMR IDs in Clinical Review.</p> <p>If left blank, reports will not purge.</p> <p>[Determines how long reports are available within the system.]</p> <p>[If there are too many orders purging, the midnight run can run for longer periods of time. It is recommended that this parameter be dropped in increments of 30 days at a time to allow monitoring of the Midnight Run.]</p>	MEDITECH recommends leaving this field blank or setting it to "999."	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> ● 1-999 ● Blank = Reports will never purge

	<p>[Once the report purges, the audit trail will purge with it, and no longer be available in IDM. The report and audit trail would still be available in the E-Chart if set up accordingly.]</p>		
<p>Report Purge: External Reports</p> <p>Months</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>Enter the number of months that you want IDM to retain external medical summary (XMS) reports for a specific status before IDM purges this information. The value you enter at this parameter for this department overrides the value you entered at the Months (External Reports) parameter.</p> <p>If left blank, reports will not purge.</p> <p>[This parameter involves purging IDM reports. Once purged, the reports will no longer be available in the CHART.]</p> <p>[If there are too many reports purging, the midnight run can run for longer periods of time. It is recommended that this parameter be dropped in increments of one month at a time to allow monitoring of the Midnight Run.]</p> <p>[Once the report purges, the audit trail will purge with it, and no longer be available in IDM. The report and audit trail would still be available in the E-Chart if set up accordingly.]</p> <p>DISCLAIMER: This is currently a place holder, as complete functionality has not yet been coded.</p>	<p>MEDITECH recommends leaving this field blank or setting it to “999.”</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> ● 1-999 ● Blank = Reports will never purge
<p>Order Purge: Department</p> <p>[High Impact]</p> <p>[Audit Trail]</p>	<p>For the defined site, enter the departments for which you want to define specific order purge and archiving criteria. The values you enter for these departments override the default values you entered at the Order Purge (Days) Default, Status (Order Purge Default), and Archive Default (Order Purge) parameters.</p> <p>[Determines eligibility for Orders to purge from IDM.]</p> <p>[Once the order purges, the audit trail will purge with it, and no longer be available in IDM. The order audit trail would still be available in the E-Chart if set up accordingly.]</p>	<p>No Recommended Setting</p>	<p>Lookup: IDM Department Dictionary</p>
<p>Order Purge:</p>	<p>For the defined site and department, enter the</p>	<p>MEDITECH recommends</p>	<p>Lookup:</p>

<p>Department - Days</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>number of days after an exam is performed (that is, the service date) that you want IDM to purge orders.</p> <p>This value overrides the value you entered at the Order Purge (Days) Default and the Arc? (Order Purge - Department) parameters for this specific category only. Orders must reach their purge statuses before IDM can purge them.</p> <p>The value you enter at this parameter overrides the value you entered at the Days - (Order Purge - Department) parameter.</p> <p>If left blank, orders will not purge.</p> <p>For example, you can enter up to 9999 days at this parameter. If you do not want orders to purge, do not define a date in this field or at the category order purge field.</p> <p>[Effect on ADM Purging: You can purge a patient account in ADM only after the system purges all orders for the account in IDM.]</p> <p>[If there are too many orders purging, the midnight run can run for longer periods of time. It is recommended that this parameter be dropped in increments of 30 days at a time to allow monitoring of the Midnight Run.]</p> <p>[Once the order purges, the audit trail will purge with it, and no longer be available in IDM. The order audit trail would still be available in the E-Chart if set up accordingly.]</p>	<p>leaving this blank or setting it to "9999."</p>	<p>Keypad/Calculator</p> <ul style="list-style-type: none"> ● 1-9999 ● Blank = Orders will never purge
<p>Order Purge: Category</p> <p>[High Impact]</p> <p>[Audit Trail]</p>	<p>For the defined site, enter the categories for which you want to define specific order purge and archiving criteria.</p> <p>The values you enter for these categories override the default values you entered at the Order Purge (Days) Default , Sts (Order Purge Default) and Archive (Dft)? (Order Purge) parameters.</p> <p>The value you enter at this parameter overrides the value you entered at the Department (Order Purge) parameter.</p>	<p>No Recommended Setting</p>	<p>Lookup: IDM Category Dictionary</p>

	<p>[Determines eligibility for Orders to purge from IDM.]</p> <p>[Once the order purges, the audit trail will purge with it, and no longer be available in IDM. The order audit trail would still be available in the E-Chart if set up accordingly.]</p>		
<p>Order Purge:</p> <p>Category - Days</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>For the defined site and category, enter the number of days after an exam is performed (that is, the service date) that you want IDM to purge orders.</p> <p>This value overrides the value you entered at the Order Purge (Days) Default and the Arc? (Order Purge - Department) parameters for this specific category only. Orders must reach their purge statuses before IDM can purge them.</p> <p>The value you enter at this parameter overrides the value you entered at the Days - (Order Purge - Department) parameter.</p> <p>If left blank, orders will not purge.</p> <p>For example, you can enter up to 9999 days at this parameter. If you do not want orders to purge, do not define a date in this field.</p> <p>[Effect on ADM Purging: You can purge a patient account in ADM only after the system purges all orders for the account in IDM.]</p> <p>[If there are too many orders purging, the midnight run can run for longer periods of time. It is recommended that this parameter be dropped in increments of 30 days at a time to allow monitoring of the Midnight Run.]</p> <p>[Once the order purges, the audit trail will purge with it, and no longer be available in IDM. The order audit trail would still be available in the E-Chart if set up accordingly.]</p>	<p>MEDITECH recommends leaving this field blank or setting it to "9999."</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> ● 1-9999 ● Blank = Orders will never purge

Laboratory Toolbox Parameters

BBK Toolbox Parameters - Page 2

Parameter	Function	Recommended Setting	Available Settings
-----------	----------	---------------------	--------------------

Blood Bank File Maintenance

Blood Bank file maintenance parameters are considered high impact. They will require additional review before they can be adjusted. Please discuss these parameters with your BBK Application Specialist. These are required fields. The existing defaults may not meet the regulatory requirements of your organization and should not be considered recommended settings.

<p>BBK File Maintenance Days:</p> <p>Transfusion Index/Change Order Days</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>This governs the file maintenance of transfusion data used to compile the BBK Transfusion Report and BBK Transfusion to Patient Report as well as the Change Product Order Account Audit. Enter the number of days for which the LIS retains data used by the Blood Bank (BBK) Transfusion Report Routine and the BBK Change Product Order Account Audit. The default is "45" days. This is a required field.</p> <p>[Requires Medical Device Board review before changing. BBK parameter settings require additional MEDITECH review in order to ensure that the regulated medical device recommended practices are being followed.]</p> <p>[MEDITECH's Programming team may need to run a space evaluation before setting/changing this parameter. The higher the setting for this field, the more space will be taken up on the file server. Programming will need to evaluate if there is a danger of utilizing all the space on the server before increasing the number. The higher the parameter is set, the more data the LAB midnight run needs to evaluate which lengthens the running time and increases the processing power on the LAB Background Client.]</p> <p>[Ensure the correct number of days are set to prevent needed audit data from being lost.]</p>	<p>MEDITECH recommends this set to "45" days which allows for indexes for transfusion data to be stored over a month for specific reports. This does not affect the transfusion data itself.</p> <p>MEDITECH recommends that this setting not exceed the duration necessary for your everyday workflow needs.</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none">• 1-999
<p>BBK File Maintenance Days:</p> <p>History Audit Log</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>Governs the file maintenance of the information for the Blood Bank History Audit Log. Enter the number of days for which the LIS retains this data. The default is "45" days. This is a required field.</p> <p>[Requires Medical Device Board review before changing. BBK parameter settings require additional MEDITECH review in order to ensure that the regulated medical device recommended practices are being followed.]</p> <p>[MEDITECH's Programming team may need to</p>	<p>MEDITECH recommends this set to "180" days which allows you to review any audits to the BBK history log for six months after the edit was made.</p> <p>MEDITECH recommends that this setting not exceed the duration necessary for your everyday workflow</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none">• 1-999

	<p>run a space evaluation before setting/changing this parameter. The higher the setting for this field, the more space will be taken up on the file server. Programming will need to evaluate if there is a danger of utilizing all the space on the server before increasing the number. The higher the parameter is set, the more data the LAB midnight run needs to evaluate which lengthens the running time and increases the processing power on the LAB Background Client.]</p> <p>[Ensure the correct number of days are set to prevent needed audit data from being lost.]</p>	needs.	
<p>BBK File Maintenance Days:</p> <p>Transfer Log</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>Governs the file maintenance of Unit information indexed to the BBK Transfer Log routine data. Enter the number of days for which the LIS retains this data. The default is "45" days. This is a required field.</p> <p>[Requires Medical Device Board review before changing. BBK parameter settings require additional MEDITECH review in order to ensure that the regulated medical device recommended practices are being followed.]</p> <p>[MEDITECH's Programming team may need to run a space evaluation before setting/changing this parameter. The higher the setting for this field, the more space will be taken up on the file server. Programming will need to evaluate if there is a danger of utilizing all the space on the server before increasing the number. The higher the parameter is set, the more data the LAB midnight run needs to evaluate which lengthens the running time and increases the processing power on the LAB Background Client.]</p> <p>[Ensure the correct number of days are set to prevent needed audit data from being lost.]</p>	<p>MEDITECH recommends this set to "45" days which allows you to review the unit transfer log data for over a month after the transfer occurs.</p> <p>MEDITECH recommends that this setting not exceed the duration necessary for your everyday workflow needs.</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> 1-999
<p>BBK File Maintenance Days:</p> <p>QC Specimens</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>Governs the file maintenance of specimen data for BBK Quality Control specimens. Enter the number of days for which the LIS retains this data. This is a required field. The default is "45" days.</p> <p><i>Note: The Keep field in the BBK QC Material dictionary overrides this parameter.</i></p>	<p>MEDITECH recommends this set to "730" days which allows for quality control data to be available for 2 years for reporting purposes.</p> <p>MEDITECH recommends that this setting not</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> 1-999

	<p>[MEDITECH’s Programming team may need to run a space evaluation before setting/changing this parameter. The higher the setting for this field, the more space will be taken up on the file server. Programming will need to evaluate if there is a danger of utilizing all the space on the server before increasing the number. The higher the parameter is set, the more data the LAB midnight run needs to evaluate which lengthens the running time and increases the processing power on the LAB Background Client.]</p> <p>[Ensure the correct number of days are set to prevent needed audit data from being lost.]</p>	<p>exceed the duration necessary for your everyday workflow needs.</p>	
--	---	--	--

LIS Toolbox Parameters - Page 5

Parameter	Function	Recommended Setting	Available Settings
<p>Purge Parameters The following parameters control the time frame that must be observed before an account will qualify for archive and subsequent purge if an archive has been initiated. MEDITECH management review is required to confirm if settings for Purge alone or Purge after Archive are being defined.</p>			
<p>Purge Enabled [High Impact] [EHI] [Audit Trail]</p>	<p>This prompt determines whether or not an archive/purge will be initiated with the Midnight Run.</p> <p>If set to “Y,” the Start Archive/Purge Process routine will be initiated and the Archive Patient, Donor and Unit routines will run. If set to “N,” no archiving or purging activities occur. The Archive Patient, Donor, or Unit Routine and the Start Archive/Purge Process Routine (in the LIS System Parameters) will not run.</p> <p>[The MIS Archive parameter must be set to “Yes” for reports to archive.]</p> <p>[This field determines whether or not an archive/purge will be initiated with the Midnight Run.]</p>	<p>MEDITECH recommends setting this field to “N” in most cases</p>	<ul style="list-style-type: none"> • Y • N/Blank
<p>Purge PTs w/ PTH Specs [High Impact]</p>	<p>This prompt indicates whether or not patients with pathology specimens should qualify for purging.</p> <p>If set to “Y,” these patients will purge when the archive/purge is enabled.</p>	<p>MEDITECH recommends setting this field to “N” in most cases</p>	<ul style="list-style-type: none"> • Y • N/Blank

<p>[EHI]</p> <p>[Audit Trail]</p>	<p>If users enter "N," the system does not purge PTH, BBK, LAB, or MIC specimens for these patients.</p> <p>[The archiving, purging and subsequent expunging of data must be done purposefully in order to ensure all data necessary for regulatory purposes is retained and accessible.]</p> <p>[This prompt indicates whether or not patients with PTH specimens should qualify for purging. If "N" is entered, the system will not purge PTH, BBK, LAB, and MIC Specimens for these patients.]</p>		
<p>Expunge Delay Days</p> <p>[High Impact]</p> <p>[EHI]</p> <p>[Audit Trail]</p>	<p>Enter the number of days after purging that the system permanently removes data.</p> <p>Data that has been purged, but not yet expunged, can be reindexed. This data will be eligible for the archive/purge jobs once the purge delay is again reached.</p> <p>The archiving, purging and subsequent expunging of data must be done purposefully in order to ensure all data necessary for regulatory purposes is retained and accessible.</p> <p>If the organization does not choose a number at this parameter, the system uses "0" as the default for the number of days. "0," or blank, means that purging occurs immediately that day and will be final.</p> <p>[The archiving, purging and subsequent expunging of data must be done purposefully in order to ensure all data necessary for regulatory purposes is retained and accessible.]</p> <p>[This field defines the number of days after purging that the system permanently removes data. Data that has been purged, but not yet expunged, can be reindexed. This data will be eligible for the archive/purge jobs once the purge delay is again reached.]</p>	<p>MEDITECH recommends keeping this field set to the default of "5"</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> • 1-99 • Blank = 0
<p>Archive Internal Inquiry</p> <p>[High Impact]</p> <p>[EHI]</p>	<p>If set to "Y," the system will archive a copy of the Internal Inquiry prior to expunging.</p> <p>If set to "N" or blank, a copy of the internal inquiry is not archived.</p>	<p>MEDITECH recommends setting this field to "Y"</p>	<ul style="list-style-type: none"> • Y • N/Blank

<p>[Audit Trail]</p>	<p>[The archiving, purging and subsequent expunging of data must be done purposefully in order to ensure all data necessary for regulatory purposes is retained and accessible.]</p> <p>[If set to “No,” or left blank, a copy of the Internal Inquiry will not be archived. Data that has been purged without archiving will not be eligible to be reindexed.]</p>		
<p>Archive/Purge Days by Patient Type</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[EHI]</p> <p>[Audit Trail]</p>	<p>The next group of prompts are used to determine the length of time (in days) for which the system will retain patient and specimen data for different patient types. These parameters also determine whether or not the system will archive this data prior to purging. After this time period has elapsed, the system purges the data. The Days are required fields.</p> <p>The available patient types are:</p> <ul style="list-style-type: none"> ● CLI ● ER ● IN ● INO ● RCR ● REF ● SDC ● POV <p>Archive: Enter “Y” if the hospital wants the patient and specimen data for this patient type archived before it is purged. Enter “N,” or leave blank, if the hospital does not want the system to archive this data.</p> <p>[The archiving, purging and subsequent expunging of data must be done purposefully in order to ensure all data necessary for regulatory purposes is retained and accessible.]</p> <p>[Programming may need to determine an initial setting to incrementally archive records without excessive resource utilization.]</p> <p>[If Set to “N,” or left blank, patient and specimen data will not be purged/archived for the defined patient types.]</p>	<p>MEDITECH recommends keeping the default of “60” for Purge/Archive Days and “Y” for Archive.</p>	<p>Purge/Archive Days Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> ● 1-9999 <p>Archive</p> <ul style="list-style-type: none"> ● Y ● N/Blank
<p>Archive/Purge: Unit</p>	<p>Days: Enter the length of time (in days) for which the system will retain Blood Bank (BBK) unit data.</p>	<p>MEDITECH recommends keeping</p>	<p>Purge/Archive Days Lookup: Keypad/Calculator</p>

<p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>This is a required field.</p> <p>The system uses the BBK unit data for the following BBK reports:</p> <p style="padding-left: 40px;">Unit Status Activity Report</p> <ul style="list-style-type: none"> * Components/Aliquots Log * Pooled Units Log * Final Disposition * Reorder List * Location List * Reserved Donation List * Transfer List * Inventory List * Inventory Summary <p>Archive: If your healthcare organization wants the system to archive the BBK unit information before it is purged, enter “Y.” If your healthcare organization does not want the system to archive this data, enter “N.” This is a required field.</p> <p>[The archiving, purging and subsequent expunging of data must be done purposefully in order to ensure all data necessary for regulatory purposes is retained and accessible.]</p> <p>[Programming may need to determine an initial setting to incrementally archive records without excessive resource utilization.]</p> <p>[If set to “N,” or left blank, BBK unit information will not be purged/archived.]</p>	<p>the default of “60” for Purge/Archive Days and “Y” for Archive.</p>	<ul style="list-style-type: none"> ● 1-9999 <p>Archive</p> <ul style="list-style-type: none"> ● Y ● N
<p>Archive/Purge: Donor</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>Days: Enter the length of time (in days) for which the system retains Blood Bank (BBK) donor specimen data. This is a required field.</p> <p>Archive: If your healthcare organization wants the system to archive the BBK donor information before it is purged, enter “Y.” If your healthcare organization does not want the system to archive this data, enter “N.” This is a required field.</p> <p>[The archiving, purging and subsequent expunging of data must be done purposefully in order to ensure all data necessary for regulatory purposes is retained and accessible.]</p> <p>[Programming may need to determine an initial</p>	<p>MEDITECH recommends keeping the default of “60” for Purge/Archive Days and “Y” for Archive.</p>	<p>Purge/Archive Days Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> ● 1-9999 <p>Archive:</p> <ul style="list-style-type: none"> ● Y ● N

	<p>setting to incrementally archive records without excessive resource utilization.]</p> <p>[If Set to “N,” or left blank, BBK donor information will not be archived/purged.]</p>		
<p>Archive LIS Reports</p> <p>[High Impact]</p> <p>[EHI]</p> <p>[Audit Trail]</p>	<p>Indicate which reports should be archived when a patient’s data is archived. This is a required field.</p> <p>[The archiving, purging and subsequent expunging of data must be done purposefully in order to ensure all data necessary for regulatory purposes is retained and accessible.]</p> <p>[If Set to “N,” or left blank, LIS reports will not be archived/purged.]</p>	<p>Reports with required data needed should be added to this field for archiving</p>	<p>Lookup: LIS Reports Dictionary</p>

Laboratory Customer Defined Parameters

LIS Customer Defined Parameters - Page 5

Parameter	Function	Recommended Setting	Available Settings
<p>Data Audit Trail</p> <p>The next two fields determine whether certain information is retained for the Specimen and Requisition Audits and for how long it is kept.</p>			
<p>Data Audit Trail: Active</p> <p>[High Impact]</p> <p>[Audit Trail]</p>	<p>If set to "Y," data will be retained for the purposes of the Specimen and Requisition Audit Routines</p> <p>When set to “Y,” the Data Audit Trail file maintains the following detail information for specimens:</p> <ul style="list-style-type: none"> ● Collection/Receive Time ● Receive Date ● Collected/Received By ● Collection Category ● Edits to comments ● Test priority changes ● Order queries in Lab, Microbiology, and Blood Bank ● Specimen Type queries in Pathology <p>When set to “Y,” the Data Audit Trail file maintains the following detail information for</p>	<p>MEDITECH recommends setting this to “Y” to keep a record of all specimen audits for tracking purposes</p>	<ul style="list-style-type: none"> ● Y ● N/Blank

	requisitions: <ul style="list-style-type: none"> ● Order, Test, and Procedure additions ● Order, Test, and Procedure cancellations ● Pathology tissues, procedures, and specimen type changes ● Deletions or additions by a physician <p>[As with all file maintenance, adjusting this setting could result in loss of data.]</p> <p>[If set to "N," or left blank, Specimen and Requisition Audits will not be kept.]</p>		
Data Audit Trail: Days to Keep [High Impact] [Performance] [Audit Trail]	This field is used to determine how long the system stores Specimen and Requisition Audit routine data before it file is maintained. The entry can be up to 9999. [As with all file maintenance, adjusting this setting could result in loss of data.] [As with all file maintenance, adjusting this setting could result in loss of data. If set with a high setting, it could take a large amount of space on the LAB File Server and cause the LAB Midnight Run to take a long time to complete.] [If left blank, all Specimen and Requisition audit information will be file maintained during the Midnight Run.]	MEDITECH recommends this set to "90" days which provides you with multiple months of data without the risk of impacting performance.	Lookup: Keypad/Calculator <ul style="list-style-type: none"> ● 1-9999 ● Blank = Specimen and Requisition data will be file maintained during the Midnight Run.

LIS Customer Defined Parameters - Page 8

Parameter	Function	Recommended Setting	Available Settings
Electronic Chart The electronic chart (eChart) is an online display of a complete patient medical record chart that users can view via the Medical Records application (MRI). A form type is a category that identifies similar contents of medical records (for example, discharge summaries). The same form can not be defined for each of the eChart parameters. For LIS Final Summaries and PTH Specimen Reports, an LIS Report must also be defined.			
Final Summary: MIS Form	Enter the MIS Medical Record Form to associate with the summary report entered at the	MEDITECH recommends defining the standard	Lookup: MIS Medical Records Forms Dictionary

<p>[High Impact]</p> <p>[Audit Trail]</p>	<p>corresponding Final Summary Report parameter for the Discharge Summary form type. The system sends this form to the eChart to identify that report.</p> <p><i>Note: You must enter a different medical record form for each eChart Form parameter.</i></p> <p>[As the patient’s comprehensive record is found in the eChart, it is important that the formats defined include all necessary demographic and result data.]</p> <p>[If this field is blank, the system will not queue discharge summary reports to the eChart.]</p>	<p>MIS format “ZLAB.PATSUM.” If your organization is using a custom format, that should be defined.</p>	
<p>Final Summary: LIS Report</p> <p>[High Impact]</p> <p>[Audit Trail]</p>	<p>Enter the SUM type summary LIS report to associate with the medical record form entered at the previous Final Summary EChart MIS Form field for the Discharge Summary form type. This field is only accessible and is required if an MIS Medical Records form is defined in the previous field, MIS Form, for Final Summary.</p> <p>[As the patient’s comprehensive record is found in the eChart, it is important that the formats defined include all necessary demographic and result data.]</p> <p>[If this field is blank, the system will not queue discharge summary reports to the eChart.]</p>	<p>MEDITECH recommends defining the standard LIS “LIS.ECHART.” If your organization is using a custom format, that should be defined.</p>	<p>Lookup: LIS Report Dictionary</p>
<p>BBK Transfusions: MIS Form</p> <p>[High Impact]</p> <p>[Audit Trail]</p>	<p>Enter the medical record form to associate with the standard report the system uses to send data to the eChart. The system sends this form to the eChart for the transfusion report form type to identify that report.</p> <p><i>Note: A different medical record form must be entered for each eChart Form parameter.</i></p> <p>[As the patient’s comprehensive record is found in the eChart, it is important that the formats defined include all necessary demographic and result data.]</p> <p>[If this field is blank, the system will not queue BBK summary reports to the eChart.]</p>	<p>MEDITECH recommends defining any MIS Medical Record Document Form with the Document Source of “LAB.TX.REPORT.”</p>	<p>Lookup: MIS Medical Records Forms Dictionary</p>
<p>Tx Reactions: MIS</p>	<p>Enter the medical record form to associate with</p>	<p>MEDITECH recommends</p>	<p>Lookup: MIS Medical</p>

<p>Form</p> <p>[High Impact]</p> <p>[Audit Trail]</p>	<p>the standard report the system uses to send data to the eChart. The system sends this form to the eChart for the transfusion reaction form type to identify that report.</p> <p><i>Note: A different medical record form must be entered for each eChart Form parameter.</i></p> <p>[As the patient’s comprehensive record is found in the eChart, it is important that the formats defined include all necessary demographic and result data.]</p> <p>[If this field is blank, the system will not queue BBK summary reports to the eChart.]</p>	<p>defining Any MIS Form with the source of “LAB.TX.REPORT.”</p>	<p>Records Forms Dictionary</p>
<p>PTH Specimen (Dft): MIS Form</p> <p>[High Impact]</p> <p>[Audit Trail]</p>	<p>Enter the medical record form to associate with the specimen report entered at the corresponding Pathology Report parameter for the Pathology Specimen Report form type.</p> <p><i>Note: A different medical record form must be entered for each eChart Form parameter.</i></p> <p>[As the patient’s comprehensive record is found in the eChart, it is important that the formats defined include all necessary demographic and result data.]</p> <p>[If this field is blank, the system will not queue PTH summary reports to the eChart.]</p>	<p>MEDITECH recommends defining any MIS Form with the source of “LAB.PTH.REPORT.”</p>	<p>Lookup: MIS Medical Records Forms Dictionary</p>
<p>PTH Specimen (Dft): LIS Report</p> <p>[High Impact]</p> <p>[Audit Trail]</p>	<p>To determine the report format to send to the eChart, the system identifies the default LIS Report Format for the specimen report (SPEC type) entered here. The system sends the plain text pathology report for that report format.</p> <p>This field is only accessible and is required if an MIS Medical Records form is defined in the previous field for PTH Specimen (Dft). Enter the SPEC type LIS report to assign to the Pathology Specimen Report form type in LAB.</p> <p><i>Note: “Y” must be entered at the Print PTH field in the LIS Report Dictionary for the PTH report entered.</i></p> <p>To determine the report format to send to the eChart for PTH reports, the system first identifies</p>	<p>MEDITECH recommends defining the LIS Report format with all relevant data.</p>	<p>Lookup: MIS Medical Records Forms Dictionary</p>

	<p>the default LIS report format for the LIS Report entered at the Pathology Report EChart Form parameter:</p> <ul style="list-style-type: none"> • If users created an MS Word report for the LIS report format since the last specimen activity, the system sends the MS Word report. • If users created a MEditor report but no MS Word report for that report format since the last specimen activity, the system sends the MEditor report. • If users create neither an MS Word report nor a MEditor report, the system sends the plain text PTH report for the LIS Report Format. <p>[As the patient’s comprehensive record is found in the eChart, it is important that the formats defined include all necessary demographic and result data.]</p> <p>[If this field is blank, the system will not queue PTH summary reports to the eChart.]</p>		
<p>GEN Specimen</p> <p>[High Impact]</p> <p>[Audit Trail]</p>	<p>Enter the medical record form you want to assign to the Genetic Specimen Report form type in LAB.</p> <p>Note: You must enter a different medical record form for each eChart form parameter.</p> <p>The system sends the form you define in this field to eChart upon completion of each GEN secondary specimen.</p> <p>[As the patient’s comprehensive record is found in the eChart, it is important that the formats defined include all necessary demographic and result data.]</p> <p>[If this field is blank, the system will not queue GEN summary reports to the eChart.]</p>	<p>MEDITECH recommends defining an MIS Form with the source of “LAB.GEN.REPORT.”</p>	<p>Lookup: MIS Form Dictionary</p>
<p>PTH Prefix</p> <p>[High Impact]</p> <p>[Audit Trail]</p>	<p>An MIS Medical Records Form and LIS Report Format may be set up for each Pathology department prefix. Enter the prefix of the pathology departments to which a report and form for eChart will be assigned.</p> <p>[As the patient’s comprehensive record is found</p>	<p>MEDITECH recommends defining a prefix that requires a unique report format.</p>	<p>Free Text: Pathology Department Prefixes</p>

	<p>in the eChart, it is important that the formats defined include all necessary demographic and result data.]</p> <p>[If this field is blank, the system will queue up the MIS Medical Records Form and LIS Report defined in the previous PTH Specimen (Dft) field (LIS Report) as opposed to sending a different form or report for each defined PTH Prefix to the eChart.]</p>		
<p>PTH Prefix: MIS Form</p> <p>[High Impact]</p> <p>[Audit Trail]</p>	<p>A Medical Records form may be selected for each Pathology department prefix (PTH Prefix is a look-up to the defined PTH Prefixes). Enter the prefix of the pathology departments to assign the form for eChart. If a PTH Prefix is entered, the MIS Form field is required.</p> <p>[As the patient’s comprehensive record is found in the eChart, it is important that the formats defined include all necessary demographic and result data.]</p> <p>[If this field is blank, the system will not queue PTH summary reports to the eChart.]</p>	<p>MEDITECH recommends defining a MIS Form with the source of “LAB.PTH.REPORT.”</p>	<p>Lookup: MIS Medical Records Forms Dictionary</p>
<p>PTH Prefix: LIS Report</p> <p>[High Impact]</p> <p>[Audit Trail]</p>	<p>An LIS Report may be selected for each Pathology department prefix (PTH Prefix is a look-up to the defined PTH Prefixes). Enter the prefix of the pathology departments to assign the report for eChart. If a PTH Prefix is entered, the LIS Report field is required.</p> <p>Enter the SPEC type LIS report to assign to the Pathology Specimen Report form type in LAB.</p> <p><i>Note: “Y” must be entered at the Print PTH field in the LIS Report Dictionary for the PTH report entered.</i></p> <p>To determine the report format to send to the eChart for PTH reports, the system first identifies the default LIS report format for the LIS Report entered at the Pathology Report EChart Form parameter:</p> <ul style="list-style-type: none"> • If users created an MS Word report for the LIS report format since the last specimen activity, the system sends the MS Word report. 	<p>MEDITECH recommends defining the LIS report with all relevant data.</p>	<p>Lookup: LIS Report Format Dictionary</p>

	<ul style="list-style-type: none"> • If users created a MEditor report but no MS Word report for that report format since the last specimen activity, the system sends the MEditor report. • If users create neither an MS Word report nor a MEditor report, the system sends the plain text PTH report for the LIS Report Format. <p>[As the patient's comprehensive record is found in the eChart, it is important that the formats defined include all necessary demographic and result data.]</p> <p>[If this field is blank, the system will not queue PTH summary reports to the eChart.]</p>		
--	---	--	--

Pharmacy Toolbox Parameters

File Maintenance
The File Maintenance parameters define how the system retains specific data by establishing how long the system stores certain information. Patient and medication data is purged using the Purge/Archive routines. Additional information is eligible to be purged as defined below.

If a file maintenance parameter value is set too high, space usage for this data may become an issue. Periodic monitoring, especially in large increases should take place. If a file maintenance parameter value is set too low, data can be purged earlier than desired. In addition, with any changes to a lesser value, incremental adjustments may be necessary until the requested setting is reached in order to prevent performance issues as midnight run processes could be affected.

The recommendation to lower values and small increments stems from the deletion of data from NPR; the larger the number change, the more data is flagged for deletion by the midnight run that day. Where normally the system would be cleaning up one day's worth of activity, changing a file maintenance parameter will result in the system needing to clear several days worth of activity, which will take the job longer to complete.

Parameter	Function	Recommended Setting	Available Settings
Patient Purge Log [Performance] [USCDI] [Audit Trail]	This parameter determines the number of days purged patient information is available on the Archive Error Log. This is a required field, and cannot be left blank. [If a file maintenance parameter value is set too high, space usage for this data may become an issue. Lowering the value of this parameter should be done in small increments to avoid negatively impacting system performance.]	MEDITECH recommends this be set to the default value of "90" to account for any outstanding outpatient activity needing to be addressed.	Lookup: Keypad/Calculator <ul style="list-style-type: none"> • 1-9999

[This field controls the number of days purged patient information is available on the Archive Error Log. To note, if this parameter is increased space may become an issue.]

Purge/Archive

Parameter	Function	Recommended Setting	Available Settings
Deindex (Outpatient/ Discharge) [High Impact] [Performance] [USCDI] [Audit Trail]	<p>These parameters determine the number of days account information remains available to users after the last activity (such as billing for a medication, entering an edit in Admissions (ADM), or canceling an order). After this number of days passes without activity, the system deindexes the patient account information. This account will no longer appear in lookups or be available for reports. Users cannot edit or print the deindexed medication order data in PHA. Accounts which are deindexed are still eligible to be reindexed until the information is finally purged from the system. This is a required field, and cannot be left blank.</p> <p>[Many states have their own requirements for how long patient data needs to be available to be retrieved. The values for these parameters, and the values for the following Purge Delay parameters, when added together should encompass the required amount of days.]</p> <p>[Lowering the value of this parameter should be done in small increments to avoid negatively impacting system performance.]</p> <p>[Once information is purged from the system, this information will no longer be available.]</p>	<p>MEDITECH recommends this be set to "2585" days. Most states require detailed administration history to be available for at least 7 years.</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> 1-9999
Purge Delay (Outpatient/ Discharge) [High Impact] [Performance] [USCDI]	<p>These parameters determine how many days after patient accounts are deindexed that the outpatient or discharged patient information is deleted permanently from the system. A purge delay can be defined even if archiving does not occur. To reindex (restore) patient and medication order information that has not yet been purged, the Reindex Purged Patients/Orders routine should be used. The Reindex Patients/Orders routine can be accessed from <i>System Mgmt</i></p>	<p>MEDITECH recommends this be set to "400" days. This default has been defined in compliance with common state laws and will work in conjunction with the Deindex parameters.</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> 1-999

<p>[Audit Trail]</p>	<p>sidebar button > System Management > Purge/Archive > Reindex Patient Orders routines. This is a required field, and cannot be left blank.</p> <p>[Many states have their own requirements for how long patient data needs to be available to be retrieved. The value for these parameters, and the value for the prior Deindex parameters, when added together should encompass the required amount of days.]</p> <p>[MEDITECH’s programming team will need to review to determine how to set (and reduce) this parameter if the healthcare organization wants to begin the process of Archiving or Purging in the Pharmacy application. Lowering the value of this parameter should be done in small increments to avoid negatively impacting system performance.]</p> <p>[Once information is purged from the system, this information will no longer be available.]</p>		
<p>Archive (Outpatient/ Discharge)</p> <p>[USCDI]</p> <p>[Audit Trail]</p>	<p>This parameter determines whether patient information is archived to MIS Archiving (<i>Info Systems > MIS > Archived Documents</i>).</p> <p>If this field is set to “Y,” outpatient and/or discharged patient data is archived to MIS prior to being deindexed.</p> <p>If this field is set to “N,” or left blank, MIS Archiving of PHA data is not enabled.</p> <p>[If the field is set to “N,” or left blank, Outpatient/Discharge patient information will no longer be available within the system after being purged.]</p>	<p>MEDITECH recommends this be set to “Y”</p>	<ul style="list-style-type: none"> ● Y ● N/Blank

Pharmacy Customer-Defined Parameters

Defaults

Parameter	Function	Recommended Setting	Available Settings
<p>Retain Audit Trail Info</p> <p>[High Impact]</p>	<p>This parameter determines if Rx Audit Trail information is retained. Patient Rx information includes the order screen at the time of order</p>	<p>MEDITECH recommends this be set to “Y”</p>	<ul style="list-style-type: none"> ● Y ● N/Blank

<p>[Audit Trail]</p>	<p>entry and any edits or functions performed on this order. The date, time, and user name appear beside each edit made to an order.</p> <p>If set to "Y," the system will retain patient Rx information. If set to "N," or left blank, Rx information will not be retained.</p> <p>[Not enabling this field can negatively impact reports such as the RX Audit and PHA Print Order, as no Audit Trail History will be recorded at all to display.]</p> <p>[If set to "N," or left blank audit trail information will be purged and will no longer be available within the system.]</p>		
-----------------------------	---	--	--

Decision Support Audit Trail Settings

Quality Management Toolbox Parameters

Maintenance

Parameter	Function	Recommended Setting	Available Settings
<p>Purge Stats (Years)</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>Enter the number of years (1-9) statistics are available for the facility defined above before the information is purged from the system.</p> <p>If this field is left blank, statistics will not purge.</p> <p>[MEDITECH has defined this as Performance due to the negative impact it can have on system performance if not set appropriately based on your hardware/network capabilities.]</p> <p>[Once statistics purge, they will no longer be available within the Statistics Desktop.]</p>	<p>MEDITECH recommends setting this field to "9" years.</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> ● 1-9 ● Blank = Statistics will never purge

Risk Management Toolbox Parameters

Maintenance

Parameter	Function	Recommended Setting	Available Settings
-----------	----------	---------------------	--------------------

<p>Statistics Purge (Years)</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>Enter the number of years (1-9) statistics are available for each facility before they are purged from the system.</p> <p>If this field is left blank, statistics will not purge.</p> <p>[Setting the Statistic Purge parameter too high could impact statistics compile times when accessing the routine.]</p> <p>[Once statistics purge, they will no longer be available within the Statistics Desktop.]</p>	<p>MEDITECH recommends setting this field to "9" years.</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> • 1-9 • Blank = Statistics will never purge
--	--	---	---

Surveillance Toolbox Parameters

Toolbox Parameters

Parameter	Function	Recommended Setting	Available Settings
<p>Surveillance Type Active</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>Define the type of Surveillance functionality to enable in this system: Full, Restricted, or None.</p> <p>Full: Enables all Surveillance features. Restricted: Enables partial Surveillance functionality. Most Surveillance features are inactive. None/blank: Surveillance is inactive.</p> <p>[If this parameter is not set appropriately based on hardware and network capabilities, it may negatively impact performance. If set to "Yes" and Surveillance is not configured to run on its own background job client, it may cause performance issues for other applications running on the same background job client.]</p> <p>[Once Surveillance data is enabled, this information will be available in the Account Activity Audit Trail.]</p>	<p>MEDITECH recommends setting this field to "Full"</p>	<ul style="list-style-type: none"> • Full • Restricted • None

Financial Management Audit Trail Settings

Materials Management Toolbox Parameters

Purge Delays

Parameter	Function	Recommended Setting	Available Settings
Stock Patient Issue in Days [Audit Trail]	Enter the number of days prior to which all CLOSED or CANCELLED patient issue records should be purged when the Purge Patient Issues Record Routine is run. This is a required field, and cannot be left blank. [Purged patient issue records are purged, they will not be available on reports.]	MEDITECH recommends setting this to a value between “60-90” Days.	Lookup: Keypad/Calculator <ul style="list-style-type: none"> • 5-999

Other Audit Trail Settings

Management Information Systems Toolbox Parameters

MIS MAT Toolbox - Main

Parameter	Function	Recommended Setting	Available Settings
Track Record Access [Performance] [Audit Trail]	To allow users to include audit record details in the MIS User Activity Logs, enter “Yes.” To prevent users from including audit record details in the MIS User Activity Logs, enter “No.” [MEDITECH’s programming team may need to run a space evaluation before setting/ changing this parameter.] [Turning off Track Record Access will disable the tracking of detailed patient activity within the User Activity Logs.]	MEDITECH recommends setting this to “Yes.”	<ul style="list-style-type: none"> • Yes • No
User Log Purge Delay [Performance] [Audit Trail]	Enter the number of days for which the system maintains User Activity Log data. The system purges data older than (today’s date minus this number of days). For example, if “30” is entered here, you can only get user activity data for the last 30 days. [MEDITECH’s programming team may need to run a space evaluation before setting/ changing this parameter. If the threshold is set too high, data will not be purged, which could lead to storage constraints.] [Once the user data purges from the system it will no longer be available within audit trails.]	MEDITECH recommends setting this between “30-90” days.	Lookup: Keypad/Calculator <ul style="list-style-type: none"> • 1-99

<p>Client Temp Audit Purge Delay</p> <p>[Audit Trail]</p>	<p>Enter the number of days after which the system purges entries in the Client Temp File Audit Log on the M-AT side of the system (with the exception of outstanding entries, which are not purged).</p> <p>[Once the client temp file data purges it will no longer be available to the Client Temp File Audit Log.]</p>	<p>MEDITECH recommends setting this to “7”</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> • 1-99
<p>User Log Iso Date Format</p> <p>[Audit Trail]</p>	<p>To have the system output all dates and times in ISO 8601 format for the MIS user audit logs, enter “Yes.”</p> <p>Otherwise, enter “No” or leave this field blank.</p> <p>If you enter “Yes,” the following MIS user audit reports will print dates and times in ISO 8601 format:</p> <ul style="list-style-type: none"> • List Activity Log by User • List Activity Log by Time • List Activity Log by Device • Create User Activity Download File • List Dictionary Changes <p>For example, the ISO 8601 formatted date and time "2004-11- 05T08:15:30-05:00" corresponds to "November 5, 2004, 8:15:30 am, US Eastern Standard Time."</p> <p><i>Note: When these reports print, the standard report header is included. This standard report header includes a date and time that is not in ISO 8601 format.</i></p> <p>[If set to “No,” or left blank, dates/times would not be displayed in ISO 8601 format within audit logs.]</p>	<p>MEDITECH recommends setting this to “Yes.”</p>	<ul style="list-style-type: none"> • Yes • No/Blank
<p>Suppress Patient Audit Action</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Log]</p>	<p>Enter the types of actions you want to exclude (if any) from the Patient Audit View Log.</p> <p>To allow all actions to appear on the audit log, leave this field blank.</p> <p>Actions include:</p> <ul style="list-style-type: none"> • “Create” • “Export” • “Modify” • “Print” 	<p>For US customers, it is typically recommended to leave this blank to be compliant.</p> <p>For Canadian customers, there is no recommendation of what to suppress, but they may choose to do so for activities such as</p>	<ul style="list-style-type: none"> • Create • Export • Modify • Print • View • Enroll • Transmit

	<ul style="list-style-type: none"> • “View” • “Enroll” • “Transmit*” <p>(*That is, when someone logs onto the Health Portal as a patient, accesses the Health Summary or Visit Summary, and uses the Send Health Summary option to email it.)</p> <p>[Defining actions to be suppressed will suppress auditing of those actions. Patient Portal utilizes “Transmit” and “Enroll” actions to track patient usage of Portal. Impact on CQM reports should be reviewed prior to suppressing these actions.]</p> <p>[MEDITECH’s programming team will need to run a space evaluation before changing this parameter. If no actions or an insufficient number are suppressed, there is a slight risk that the Delivery Job connection could develop a significant backlog.]</p> <p>[If any action types are defined, the Patient Audit View will display data for action types that are not suppressed.]</p>	Printing.	
--	---	-----------	--

MIS MAT Toolbox - External

Parameter	Function	Recommended Setting	Available Settings
Direct Messaging			
Direct Message Purge Delay [Audit Trail]	The data in the Direct Messaging Activity Log will be purged by the MIS Midnight Run Background Job. This parameter controls when the activity log information is ready to be purged. [Once the Direct Message data has been purged it will no longer be available on the Direct Messaging Activity Log.]	No Recommended Setting	Lookup: Keypad/Calculator <ul style="list-style-type: none"> • 1-999

NPR MIS Toolbox - General 2

Parameter	Function	Recommended Setting	Available Settings
User Logs ISO Date Format	To have the system output all dates and times in ISO 8601 format for the MIS user audit logs, enter “Yes.”	MEDITECH recommends setting this to “Yes.”	<ul style="list-style-type: none"> • Yes • No/Blank

<p>[Audit Trail]</p>	<p>Otherwise, enter “No” or leave this field blank.</p> <p>If you enter “Yes,” the following MIS user audit reports will print dates and times in ISO 8601 format:</p> <ul style="list-style-type: none"> ● List Activity Log by User ● List Activity Log by Time ● List Activity Log by Device ● Create User Activity Download File ● List Dictionary Changes <p>For example, the ISO 8601 formatted date and time "2004-11- 05T08:15:30-05:00" corresponds to "November 5, 2004, 8:15:30 am, US Eastern Standard Time."</p> <p><i>Note: When these reports print, the standard report header is included. This standard report header includes a date and time that is not in ISO 8601 format.</i></p> <p>[If set to “No,” or left blank, dates/times would not be displayed in ISO 8601 format within audit logs.]</p>		
<p>Audit/Txn Purge Delay</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>Enter the number of days Dictionary Audit data is retained. This can be overridden via the Enter/Edit Dictionary for Audit Trail routine.</p> <p>[When reducing the purge delay, dictionary audit activity will be purged unless overridden within the Enter/Edit Dictionary for Audit Trail routine.]</p> <p>[MEDITECH’s programming team may need to run a space evaluation before setting/ changing this parameter. Data should not be kept beyond “90” days as space issues on the application’s machine could potentially occur causing downstream performance issues.]</p> <p>[Once dictionary audit data has been purged it is no longer available in the system.]</p>	<p>MEDITECH recommends setting this to a value between “30-90” Days.</p>	<p>Lookup: Keypad/Calculator</p> <ul style="list-style-type: none"> ● 1-99
<p>Track Record Access</p> <p>[Performance]</p>	<p>To allow users to include audit record details in the MIS User Activity Logs, enter “Yes.” To prevent users from including audit record details in the MIS User Activity Logs, enter “No.”</p>	<p>MEDITECH recommends setting this to "Yes"</p>	<ul style="list-style-type: none"> ● Y ● N/Blank

<p>[Audit Trail]</p>	<p>[MEDITECH’s programming team may need to run a space evaluation before setting/ changing this parameter.]</p> <p>[Turning off Track Record Access will disable the tracking of detailed patient activity within the User Activity Logs.]</p>		
<p>Suppress Patient Audit Action</p> <p>[High Impact]</p> <p>[Performance]</p> <p>[Audit Trail]</p>	<p>Enter the types of actions you want to exclude (if any) from the Patient Audit View Log.</p> <p>To allow all actions to appear on the audit log, leave this field blank.</p> <p>Actions include:</p> <ul style="list-style-type: none"> ● “Create” ● “Export” ● “Modify” ● “Print” ● “View” ● “Enroll” ● “Transmit*” <p>(*That is, when someone logs onto the Health Portal as a patient, accesses the Health Summary or Visit Summary, and uses the Send Health Summary option to email it.)</p> <p>[Defining actions to be suppressed will suppress auditing of those actions. Patient Portal utilizes “Transmit” and “Enroll” actions to track patient usage of Portal. Impact on CQM reports should be reviewed prior to suppressing these actions.]</p> <p>[MEDITECH’s programming team will need to run a space evaluation before changing this parameter. If no actions or an insufficient number are suppressed, there is a slight risk that the Delivery Job connection could develop a significant backlog.]</p> <p>[If any action types are defined, the Patient Audit View will display data for action types that are not suppressed.]</p>	<p>For US customers, it is typically recommended to leave this blank to be compliant.</p> <p>For Canadian customers, there is no recommendation of what to suppress, but they may choose to do so for activities such as Printing.</p>	<ul style="list-style-type: none"> ● Create ● View ● Export ● Modify ● Print ● Transmit ● Enroll

MIS NPR Toolbox - Financial 2

Parameter	Function	Recommended Setting	Available Settings
Vendor Audit Trail Purge Days [Audit Trail]	Define the number of days to retain edits to the MIS Vendor Dictionary. Leaving this parameter blank will assume "180 days." [Once the data purges it will no longer be available to the Vendor Audit Trail.]	MEDITECH recommends setting this to "180" Days.	Lookup: Keypad/Calculator <ul style="list-style-type: none"> • 1-999 • Blank = 180 days

Note: This document lists parameters available through Expanse 2.2 Priority Pack 72

MEDITECH Proprietary:

Statement for our customers: *this document is intended for MEDITECH customers or their third party vendors with a defined need. Please do not share this information outside of that scope.*

Statement for MEDITECH staff: *this document may be shared internally. Unless this document is covered by the [exceptions list](#), do not share outside of MEDITECH without [permission](#).*

If this document is printed, saved to a local device, emailed, or otherwise taken offline, it will be uncontrolled and may become obsolete. Check for the latest version online.