

**Title:** ICP – How to Navigate the Knowledge Base

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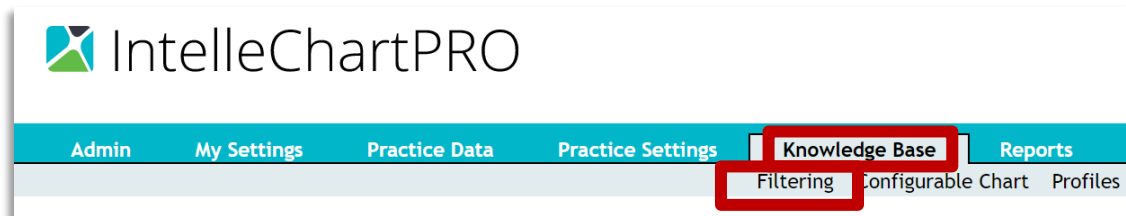
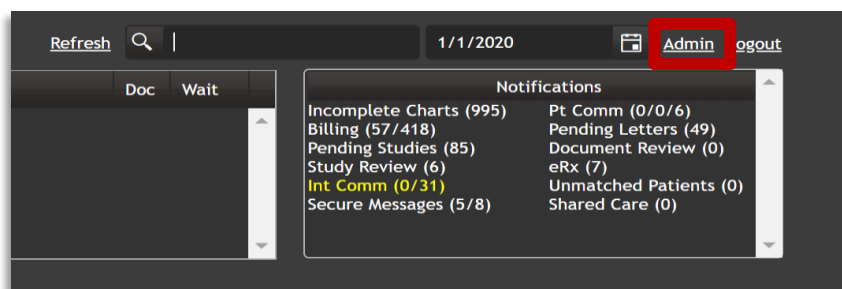
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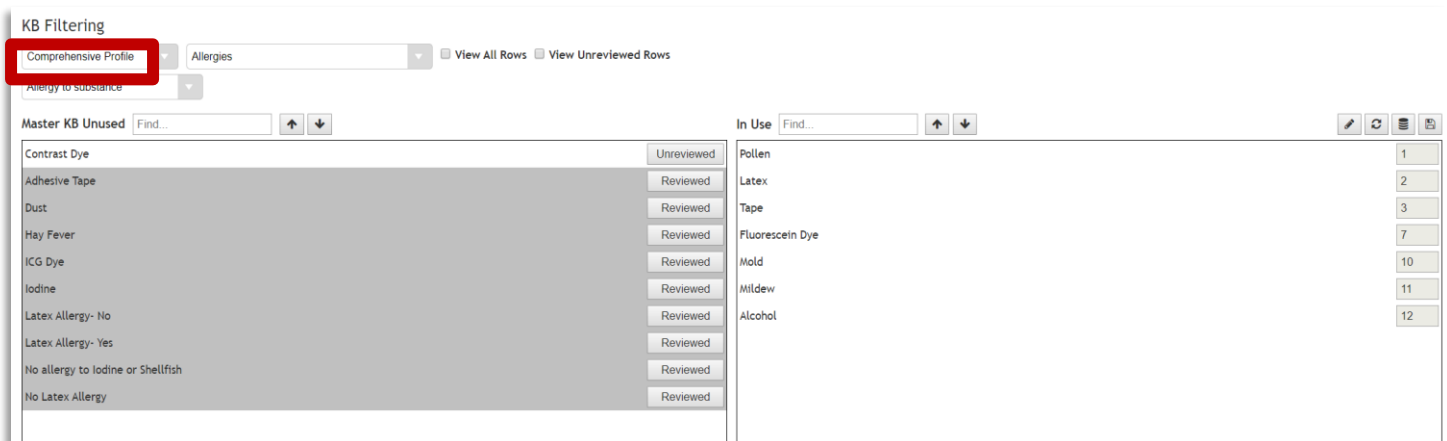
## Purpose

Every practice can make edits to their profiles to further customize their charting content by making changes in the knowledge base.

Please Note: In order to make changes in the Knowledge Base, the user must have Practice Admin permissions to “Knowledge Base” and “Filtering” tabs. These permissions can be rendered by the system administrator via the User Associations tab in the admin page.



Step 1. First select the profile you are applying changes to



Step 2. Select the area of the chart that you will be modifying

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KB Filtering

Comprehensive Profile ▼ Allergies ▼ ☐ View All Rows ☐ View Unreviewed Rows

Allergy to substance ▼

Master KB Unused  Find... ↑ ↓

Contrast Dye	Unreviewed
Adhesive Tape	Reviewed
Dust	Reviewed
Hay Fever	Reviewed
ICG Dye	Reviewed
Iodine	Reviewed
Latex Allergy- No	Reviewed
Latex Allergy- Yes	Reviewed
No allergy to Iodine or Shellfish	Reviewed
No Latex Allergy	Reviewed

In Use  Find... ↑ ↓

Pollen	1
Latex	2
Tape	3
Fluorescein Dye	7
Mold	10
Mildew	11
Alcohol	12

Step 3. Some areas of the chart have subsections (ex. Common Allergies, Allergy to substance, Specific Drug Allergy, etc.)

KB Filtering

Comprehensive Profile ▼ Allergies ▼ ☐ View All Rows ☐ View Unreviewed Rows

Allergy to substance ▼

Master KB Unused  Find... ↑ ↓

Contrast Dye	Unreviewed
Adhesive Tape	Reviewed
Dust	Reviewed
Hay Fever	Reviewed
ICG Dye	Reviewed
Iodine	Reviewed
Latex Allergy- No	Reviewed
Latex Allergy- Yes	Reviewed
No allergy to Iodine or Shellfish	Reviewed
No Latex Allergy	Reviewed

In Use  Find... ↑ ↓

Pollen	1
Latex	2
Tape	3
Fluorescein Dye	7
Mold	10
Mildew	11
Alcohol	12

Step 4. Review all available items on left column - Left column contains content shared in all practices

KB Filtering

Comprehensive Profile ▼ Allergies ▼ ☐ View All Rows ☐ View Unreviewed Rows

Allergy to substance ▼

Master KB Unused  Find... ↑ ↓

Contrast Dye	Unreviewed
Adhesive Tape	Reviewed
Dust	Reviewed
Hay Fever	Reviewed
ICG Dye	Reviewed
Iodine	Reviewed
Latex Allergy- No	Reviewed
Latex Allergy- Yes	Reviewed
No allergy to Iodine or Shellfish	Reviewed
No Latex Allergy	Reviewed

In Use  Find... ↑ ↓

Pollen	1
Latex	2
Tape	3
Fluorescein Dye	7
Mold	10
Mildew	11
Alcohol	12

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Step 5. Search for items on left column - Typing key words in the search boxes can help find items quicker. When there are multiple items that contain the keywords in the search box, use the arrows to navigate through the items.

KB Filtering

Comprehensive Profile Allergies View All Rows View Unreviewed Rows

Allergy to substance

Master KB Unused Find... ↑ ↓

Contrast Dye	Unreviewed
Adhesive Tape	Reviewed
Dust	Reviewed
Hay Fever	Reviewed
ICG Dye	Reviewed
Iodine	Reviewed
Latex Allergy- No	Reviewed
Latex Allergy- Yes	Reviewed
No allergy to Iodine or Shellfish	Reviewed
No Latex Allergy	Reviewed

In Use Find... ↑ ↓

Pollen	1
Latex	2
Tape	3
Fluorescein Dye	7
Mold	10
Mildew	11
Alcohol	12

Step 6. Once the desired item is found on the left column, simply drag and drop to the right column to make this an active item in the profile. All items on the right column reflect what is currently pulling up in the chart in that exact display order.

KB Filtering

Comprehensive Profile Allergies View All Rows View Unreviewed Rows

Allergy to substance

Master KB Unused Find... ↑ ↓

Contrast Dye	Unreviewed
Adhesive Tape	Reviewed
Dust	Reviewed
Hay Fever	Reviewed
ICG Dye	Reviewed
Iodine	Reviewed
Latex Allergy- No	Reviewed
Latex Allergy- Yes	Reviewed
No allergy to Iodine or Shellfish	Reviewed
No Latex Allergy	Reviewed

In Use Find... ↑ ↓

Pollen	1
Latex	2
Tape	3
Fluorescein Dye	7
Mold	10
Mildew	11
Alcohol	12

Step 7. To modify the sort order of items "In Use" you can either drag and drop or click the pencil icon to type in the numerical order

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KB Filtering

Comprehensive Profile Allergies View All Rows View Unreviewed Rows

Allergy to substance

Master KB Unused Find... [Up] [Down]

Item	Status
Contrast Dye	Unreviewed
Adhesive Tape	Reviewed
Dust	Reviewed
Hay Fever	Reviewed
ICG Dye	Reviewed
Iodine	Reviewed
Latex Allergy- No	Reviewed
Latex Allergy- Yes	Reviewed
No allergy to Iodine or Shellfish	Reviewed
No Latex Allergy	Reviewed

In Use Find... [Up] [Down]

Item	Index
Pollen	1
Latex	2
Tape	3
Fluorescein Dye	7
Mold	10
Mildew	11
Alcohol	12

Step 8. When making significant changes within a profile, it is important to “Backup” changes periodically. This can aid our development team restore data if needed.

NOTE: Must keep a log of date/time a backup occurred. Limit to 3 backups per profile

KB Filtering

Comprehensive Profile Allergies View All Rows View Unreviewed Rows

Allergy to substance

Master KB Unused Find... [Up] [Down]

Item	Status
Contrast Dye	Unreviewed
Adhesive Tape	Reviewed
Dust	Reviewed
Hay Fever	Reviewed
ICG Dye	Reviewed
Iodine	Reviewed
Latex Allergy- No	Reviewed
Latex Allergy- Yes	Reviewed
No allergy to Iodine or Shellfish	Reviewed
No Latex Allergy	Reviewed

In Use Find... [Up] [Down]

Item	Index
Pollen	2
Latex	3
Tape	7
Fluorescein Dye	10
Mold	11
Mildew	12
Alcohol	

Step 9. Save changes - Floppy disc icon is the save button. It will turn red when the system detects a change has been made within the section.

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**KB Filtering**

Comprehensive Profile | Allergies | View All Rows | View Unreviewed Rows

Allergy to substance

**Master KB Unused** Find... [Up] [Down]

Item	Status
Contrast Dye	Unreviewed
Adhesive Tape	Reviewed
Dust	Reviewed
Hay Fever	Reviewed
ICG Dye	Reviewed
Iodine	Reviewed
Latex Allergy- No	Reviewed
Latex Allergy- Yes	Reviewed
No allergy to Iodine or Shellfish	Reviewed
No Latex Allergy	Reviewed

**In Use** Find... [Up] [Down] [Edit] [Refresh] [Copy]

Item	Count
Pollen	1
Latex	2
Tape	3
Fluorescein Dye	7
Mold	10
Mildew	11
Alcohol	12

Step 10. If these changes apply to multiple profiles in use, copy section to other profiles. "Copy to" section at the bottom of page can copy the items "In Use" (right column) for that section to other profiles.

NOTE: It will replace existing information with this copied information, use with caution.

**KB Filtering**

Comprehensive Profile | Allergies | View All Rows | View Unreviewed Rows

Allergy to substance

**Master KB Unused** Find... [Up] [Down]

Item	Status
Contrast Dye	Unreviewed
Adhesive Tape	Reviewed
Dust	Reviewed
Hay Fever	Reviewed
ICG Dye	Reviewed
Iodine	Reviewed
Latex Allergy- No	Reviewed
Latex Allergy- Yes	Reviewed
No allergy to Iodine or Shellfish	Reviewed
No Latex Allergy	Reviewed

**In Use** Find... [Up] [Down] [Edit] [Refresh] [Copy]

Item	Count
Mold	1
Pollen	1
Latex	2
Iodine	3
Fluorescein Dye	4
Tape	5
Mildew	7
Alcohol	8

**Copy to:** SE Cornea Profile [Copy]

**TIP:** If items load incorrectly within the section, click the refresh button. If you have not saved your changes yet, and accidentally moved an item, hit the refresh button to revert/undo changes.

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**KB Filtering**

Comprehensive Profile Allergies View All Rows View Unreviewed Rows

Allergy to substance

**Master KB Unused** Find... [Up Arrow] [Down Arrow]

Item	Action
Contrast Dye	Unreviewed
Adhesive Tape	Reviewed
Dust	Reviewed
Hay Fever	Reviewed
ICG Dye	Reviewed
Iodine	Reviewed
Latex Allergy- No	Reviewed
Latex Allergy- Yes	Reviewed
No allergy to Iodine or Shellfish	Reviewed
No Latex Allergy	Reviewed

**In Use** Find... [Up Arrow] [Down Arrow]

Item	Action
Pollen	Reviewed
Latex	2
Tape	3
Fluorescein Dye	7
Mold	10
Mildew	11
Alcohol	12

## **Frequently Asked Questions (FAQ):**

**Q:** What do the "Reviewed" "Unreviewed" buttons do?

**A:** This section of the KB is no longer relevant. This was originally built in to help you identify what has been added to this section since you've last made changes within this section by marking items as "Reviewed". Since our KB team is constantly making changes daily, this function is not as helpful as it once was. Best practice is to search for the key items that are needed by using the search boxes.

**Q:** What does the "View All Rows" checkbox do?

**A:** If the area of the chart contains several subsections (ex. Allergies section contains "Allergy to Substance", "Specific Drug Allergy", "Common Drug Allergies" subsections), checking "View All Rows" will consolidate all findings in all subsections into one list. This is NOT a recommended practice for most sections as it will create confusion on sort order.

**Q:** Can I free text items to add them to the Knowledge Base?

**A:** No. Since all Knowledge Base items are a shared database among all practices using ICP, the Nextech Knowledge Base team must create any new items that do not exist in the "Master KB Unused" left column through their console. This creates accountability to ensure all items entered are accurately mapped to meet compliance and regulatory measures. If there are custom items that a practice wishes to add that do not currently exist in the Knowledge Base, the practice must create a ticket via the community portal or by sending an e-mail directly to the Knowledge Base team at [knowledgebase@nextech.com](mailto:knowledgebase@nextech.com). All cases can be tracked via the community portal.

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#### Revision History

Revision	Date	Changes	Requested By
V001	8/3/2020	Initial Release	