



**Omni-Payer™ Management Central User's Guide**  
Version 1.3.5.1

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# Preface

This manual describes how to use Omni-Payer™ 360 Viewer, which is a core component of Omni-Payer Management Central. This facility provides a browser-based comprehensive view of the golden records that are mastered across Omni domains (for example, Member and Provider). This manual is intended for Omni-Payer administrators and data stewards.

## How This Manual Is Organized

This manual includes the following chapters:

	Chapter/Appendix	Contents
<b>1</b>	Introducing Omni-Payer 360 Viewer	Provides an overview of Omni-Payer 360 Viewer.
<b>2</b>	Understanding the Console Layout and User Interface	Describes the menus and options that are found in the user interface and layout of Omni-Payer 360 Viewer.
<b>3</b>	Available Pages in Omni-Payer 360 Viewer	Describes the available pages in Omni-Payer 360 Viewer.
<b>4</b>	Using Omni-Payer Data Dictionary	Describes how to configure and use Omni-Payer Data Dictionary.
<b>A</b>	Using the Admin Console	Describes how to use the Admin Console to configure administrative properties and functions that are reflected in Omni-Payer 360 Viewer.

## Documentation Conventions

The following table lists and describes the documentation conventions that are used in this manual.

Convention	Description
THIS TYPEFACE or this typeface	Denotes syntax that you must type exactly as shown.
this typeface	Represents a placeholder (or variable), a cross-reference, or an important term. It may also indicate a button, menu item, or dialog box option that you can click or select.
<u>underscore</u>	Indicates a default setting.
Key + Key	Indicates keys that you must press simultaneously.
{ }	Indicates two or three choices. Type one of them, not the braces.
	Separates mutually exclusive choices in syntax. Type one of them, not the symbol.
...	Indicates that you can enter a parameter multiple times. Type only the parameter, not the ellipsis (...).
. . . . . .	Indicates that there are (or could be) intervening or additional commands.

## Related Publications

Visit our Technical Documentation Library at <http://documentation.informationbuilders.com>. You can also contact the Publications Order Department at (800) 969-4636.

## Customer Support

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Join the Focal Point community. Focal Point is our online developer center and more than a message board. It is an interactive network of more than 3,000 developers from almost every profession and industry, collaborating on solutions and sharing every tips and techniques. Access Focal Point at <http://forums.informationbuilders.com/eve/forums>.



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Call Information Builders Customer Support Services (CSS) at (800) 736-6130 or (212) 736-6130. Customer Support Consultants are available Monday through Friday between 8:00 A.M. and 8:00 P.M. EST to address all your questions. Information Builders consultants can also give you general guidance regarding product capabilities. Be prepared to provide your six-digit site code (xxxx.xx) when you call.

To learn about the full range of available support services, ask your Information Builders representative about InfoResponse Online, or call (800) 969-INFO.

## Help Us to Serve You Better

To help our consultants answer your questions effectively, be prepared to provide specifications and sample files and to answer questions about errors and problems.

The following table lists the environment information that our consultants require.

<b>Platform</b>	
<b>Operating System</b>	
<b>OS Version</b>	
<b>JVM Vendor</b>	
<b>JVM Version</b>	

The following table lists the deployment information that our consultants require.

<b>Adapter Deployment</b>	
<b>Container</b>	
<b>Version</b>	

<b>Enterprise Information System (EIS) - if any</b>	
<b>EIS Release Level</b>	
<b>EIS Service Pack</b>	
<b>EIS Platform</b>	

The following table lists iWay-related information needed by our consultants.

<b>iWay Adapter</b>	
<b>iWay Release Level</b>	
<b>iWay Patch</b>	

The following table lists additional questions to help us serve you better.

<b>Request/Question</b>	<b>Error/Problem Details or Information</b>
Did the problem arise through a service or event?	
Provide usage scenarios or summarize the application that produces the problem.	
When did the problem start?	
Can you reproduce this problem consistently?	
Describe the problem.	
Describe the steps to reproduce the problem.	
Specify the error messages.	

Request/Question	Error/Problem Details or Information
Any change in the application environment: software configuration, EIS/database configuration, application, and so forth?	
Under what circumstance does the problem <i>not</i> occur?	

The following is a list of error and problem files that might be applicable.

- ☐ Input documents (XML instance, XML schema, non-XML documents)
- ☐ Transformation files
- ☐ Error screen shots
- ☐ Error output files
- ☐ Trace files
- ☐ Service Manager package to reproduce problem
- ☐ Custom functions and agents in use
- ☐ Diagnostic Zip
- ☐ Transaction log

For information on tracing, see the *iWay Service Manager User's Guide*.

## User Feedback

In an effort to produce effective documentation, the Technical Content Management staff welcomes your opinions regarding this document. Please use the Reader Comments form at the end of this document to communicate your feedback to us or to suggest changes that will support improvements to our documentation. You can also contact us through our website, <http://documentation.informationbuilders.com/connections.asp>.

Thank you, in advance, for your comments.

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# 1 | Introducing Omni-Payer 360 Viewer

This chapter provides an overview of Omni-Payer 360 Viewer and describes the general layout of the interface.

## Topics:

- ▣ Overview
- ▣ Key Features and Functionality
- ▣ Client System Prerequisites

## Overview

Omni-Payer 360 Viewer is a core component of Omni-Payer Management Central. This component provides a browser-based comprehensive view of the golden records that are mastered across Omni domains (for example, Member and Provider).

Omni-Payer 360 Viewer is available only after logging on to Omni-Payer Management Central. All users must be first authenticated and authorized with the required roles and privileges before obtaining access to the viewer.

Omni-Payer 360 Viewer is a web application that can be deployed to any compatible application server. It is developed using Grails, which is an open source web application framework that uses the Groovy programming language.

## Key Features and Functionality

The main operations that can be performed by Omni-Payer 360 Viewer include:

- ☐ Viewing a list of golden records across domains.
- ☐ Conducting domain simple searches among golden and instance records.
- ☐ Conducting domain advanced searches among golden and instance records.
- ☐ Viewing details of golden records across domains.
- ☐ Viewing and comparing golden records and supporting instance records.
- ☐ Viewing subdomain records related to the golden record.
- ☐ Comparing instance records with the source record.
- ☐ Viewing the history of a golden record.
- ☐ Comparing current golden records with earlier versions.

## Client System Prerequisites

Before connecting to Omni-Payer 360 Viewer, ensure that the client system contains the prerequisites listed in the following table.

Client Component	Version
Operating System	Microsoft Windows 7
Web Browser	Microsoft Internet Explorer Version 9 or 10
Java	Version 1.7

## 2 | Understanding the Console Layout and User Interface

This chapter describes the menus and options that are found in the user interface and layout of Omni-Payer 360 Viewer.

### Topics:

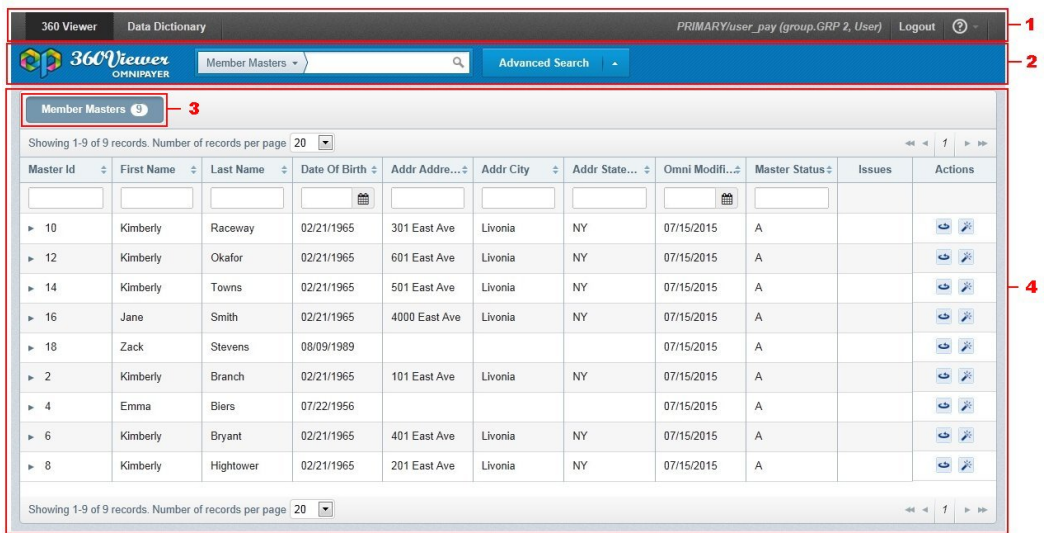
- ❑ Navigating the General Page Layout
- ❑ Navigating the Table Layout

## Navigating the General Page Layout

### In this section:

- Using the Menu Bar
- Using the Search Panel
- Using the Breadcrumb Trail
- Using the Main Page Body

All pages in Omni-Payer 360 Viewer use a common layout, as shown in the following image.



Each page contains the following areas:

1. Menu bar
2. Search panel
3. Breadcrumb trail
4. Main page body

### Using the Menu Bar

The menu bar displays different items depending on whether unauthenticated users (guests) or authenticated users are accessing Omni-Payer 360 Viewer.



For unauthenticated users, the menu bar displays the following items:

- ❑ Login button.
- ❑ About drop-down menu.



For authenticated users, the menu bar displays the following items:

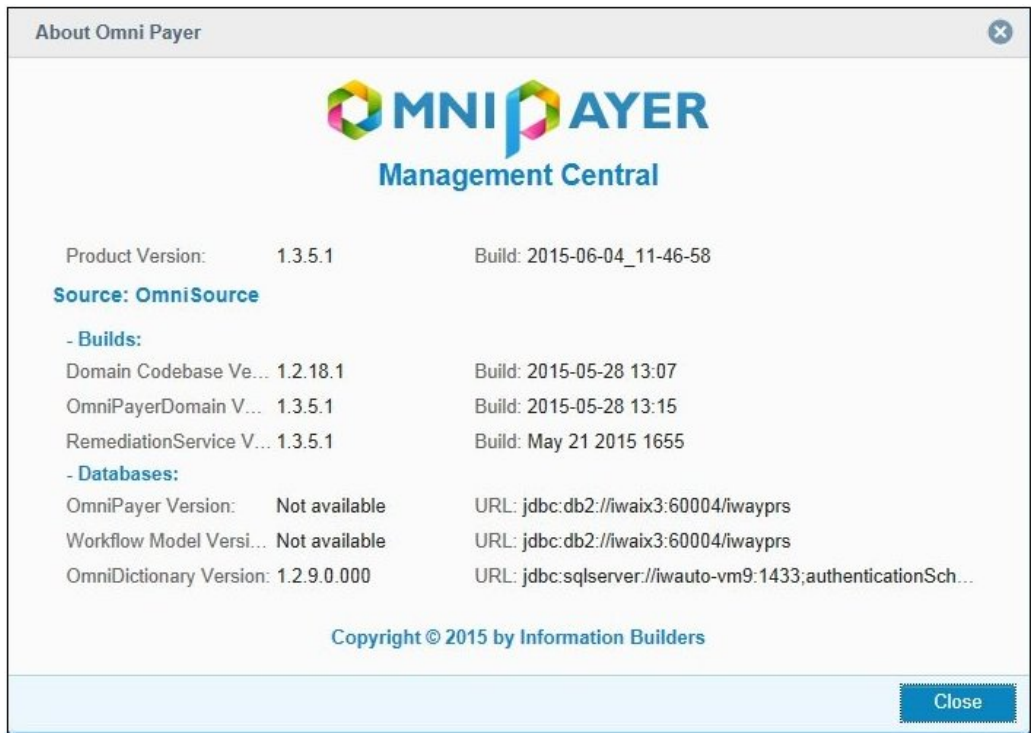
- ❑ Omni-Payer Data Management Central component buttons.
- ❑ Administration drop-down menu for the appropriate user role (for example, Data Steward, Admin, and so on).
- ❑ Current user details, including the user name and role (in parentheses).
- ❑ About drop-down menu.



The About drop-down menu contains the *About Omni Payer* option, as shown in the following image.

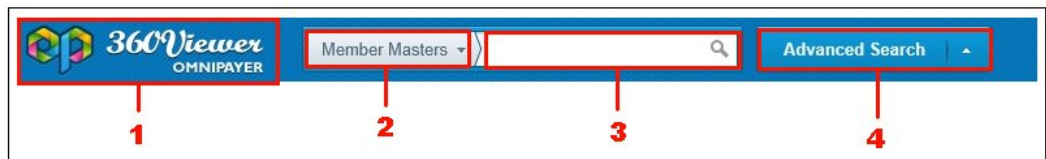


Clicking *About Omni-Payer*, displays a dialog box that contains Omni-Payer source and build information, as shown in the following image.



## Using the Search Panel

The search panel is divided into separate areas, as shown in the following image.



1. Omni-Payer 360 Viewer logo
2. Domain drop-down menu
3. Simple Search input field
4. Advanced Search button and drop-down menu

For more information on using the search panel to perform simple and advanced searches, see [Using the Search Panel](#) on page 18.

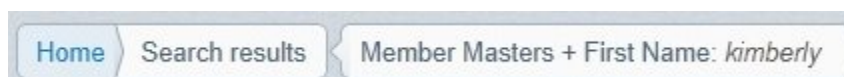
## Using the Breadcrumb Trail

Breadcrumbs allow you to keep track of your navigation within Omni-Payer 360 Viewer, as shown in the following image.



You can click on a breadcrumb item to be redirected to that corresponding page.

Search details are displayed to the right of the breadcrumb trail after performing an Advanced Search, as shown in the following image.



## Using the Main Page Body

The page body is the main area of each page where you can view, compare data, and perform searches.

Master Id	First Name	Last Name	Date Of Birth	Addr Address	Addr City	Addr State Pr...	Omni Modifie...	Master Status	Issues	Actions
▶ 10	Kimberly	Raceway	02/21/1965	301 East Ave	Livonia	NY	07/15/2015	A		
▶ 12	Kimberly	Okafor	02/21/1965	601 East Ave	Livonia	NY	07/15/2015	A		
▶ 14	Kimberly	Towns	02/21/1965	501 East Ave	Livonia	NY	07/15/2015	A		
▶ 16	Jane	Smith	02/21/1965	4000 East Ave	Livonia	NY	07/15/2015	A		
▶ 18	Zack	Stevens	08/09/1989				07/15/2015	A		
▶ 2	Kimberly	Branch	02/21/1965	101 East Ave	Livonia	NY	07/15/2015	A		
▶ 4	Emma	Biers	07/22/1956				07/15/2015	A		
▶ 6	Kimberly	Bryant	02/21/1965	401 East Ave	Livonia	NY	07/15/2015	A		
▶ 8	Kimberly	Hightower	02/21/1965	201 East Ave	Livonia	NY	07/15/2015	A		

For more information on using the various pages in Omni-Payer 360 Viewer, see [Available Pages in Omni-Payer 360 Viewer](#) on page 23.

# Navigating the Table Layout

**In this section:**

- Using the Navigation Bar
- Sorting Through Records
- Using the Calendar

Omni-Payer 360 Viewer displays retrieved data within tables. There are several types of tables in Omni-Payer 360 Viewer, which are all structured, as shown in the following image.

The screenshot shows a table with 11 columns: Master Id, First Name, Last Name, Date Of Birth, Addr Address..., Addr City, Addr State Pr..., Omni Modifie..., Master Status, Issues, and Actions. The table contains 9 data rows. Red callout numbers are placed around the table: 1 points to the top navigation bar (Showing 1-9 of 9 records, Number of records per page 20), 2 points to the column headers, 3 points to the input fields for filtering, and 4 points to the record lists.

Master Id	First Name	Last Name	Date Of Birth	Addr Address...	Addr City	Addr State Pr...	Omni Modifie...	Master Status	Issues	Actions
10	Kimberly	Raceway	02/21/1965	301 East Ave	Livonia	NY	07/15/2015	A		
12	Kimberly	Okafor	02/21/1965	601 East Ave	Livonia	NY	07/15/2015	A		
14	Kimberly	Towns	02/21/1965	501 East Ave	Livonia	NY	07/15/2015	A		
16	Jane	Smith	02/21/1965	4000 East Ave	Livonia	NY	07/15/2015	A		
18	Zack	Stevens	08/09/1989				07/15/2015	A		
2	Kimberly	Branch	02/21/1965	101 East Ave	Livonia	NY	07/15/2015	A		
4	Emma	Biers	07/22/1956				07/15/2015	A		
6	Kimberly	Bryant	02/21/1965	401 East Ave	Livonia	NY	07/15/2015	A		
8	Kimberly	Hightower	02/21/1965	201 East Ave	Livonia	NY	07/15/2015	A		

Each table contains the following areas:

- 1. Navigation bar
- 2. Column headers
- 3. Input fields for filtering
- 4. Record lists

## Using the Navigation Bar

The navigation bar provides you with functionality to move to the next, previous, first, and last page. You can also select a specific page number to navigate. The Number of records per page drop-down list specifies how many records to display on one page at once. Available values include 10, 15, 20 (default), 25, or 30.

Although headers are used to display columns names, you can click on a header to sort the data in the table by that column.

## Sorting Through Records

Sorting is case-insensitive and can be applied to one column at a time. Although headers are used to display column names, you can click on a header to sort the data in the table by that column. To change the sorting order, click on the column header again. The column by which the sorting is performed is highlighted in green and the arrow indicates ascending or descending order of sorting.

You may also filter the results using dynamic filters below the table columns headers. The results are updated dynamically to show only relevant records while you type in the value (with a slight delay). Filtering can be applied to several columns at once.

Data entered in filter fields is validated before actual filtering begins. Validation is performed dynamically as you specify the value. When invalid data is entered, a message indicating invalid data is displayed and the corresponding field is highlighted in red, as shown in the following image.

The screenshot shows the 360Viewer OMNIPAYER Member Masters interface. At the top, there is a search bar with "Member Masters" selected and an "Advanced Search" button. Below the search bar, a red error message states: "Invalid value March entered in DateOfBirth field. Date should be entered in valid format: [MM/dd/yyyy] or date range." The main table displays member records. The "Date Of Birth" column header is highlighted in green. The first row of the table has the "Date Of Birth" field set to "March", which is highlighted in red. Below the table, there is a pagination bar showing "Showing 1-9 of 9 records. Number of records per page 20".

Master Id	First Name	Last Name	Date Of Birth	Addr Address...	Addr City	Addr State Pr...
			March			
▶ 10	Kimberly	Raceway	02/21/1965	301 East Ave	Livonia	NY
▶ 12	Kimberly	Okafor	02/21/1965	601 East Ave	Livonia	NY
▶ 14	Kimberly	Towns	02/21/1965	501 East Ave	Livonia	NY
▶ 16	Jane	Smith	02/21/1965	4000 East Ave	Livonia	NY
▶ 18	Zack	Stevens	08/09/1989			
▶ 2	Kimberly	Branch	02/21/1965	101 East Ave	Livonia	NY
▶ 4	Emma	Biers	07/22/1956			
▶ 6	Kimberly	Bryant	02/21/1965	401 East Ave	Livonia	NY
▶ 8	Kimberly	Hightower	02/21/1965	201 East Ave	Livonia	NY

Validation is performed for numeric fields and fields with date format.

Using the Admin Console, you can configure the width, alignment of columns, and the specific columns that can be sorted and filtered. For more information, see [Using the Admin Console](#) on page 69.

### Using the Calendar

The calendar feature allows you to retrieve Omni records by their creation date. You can manually type in a specific date or select a date from the calendar, as shown in the following image.



By default, the calendar displays the current date for empty fields or the date specified in the input field for populated fields. To close the calendar without selecting a specific date, click any area outside of the calendar.

# 3 Available Pages in Omni-Payer 360 Viewer

This chapter describes how to use the available pages in Omni-Payer 360 Viewer.

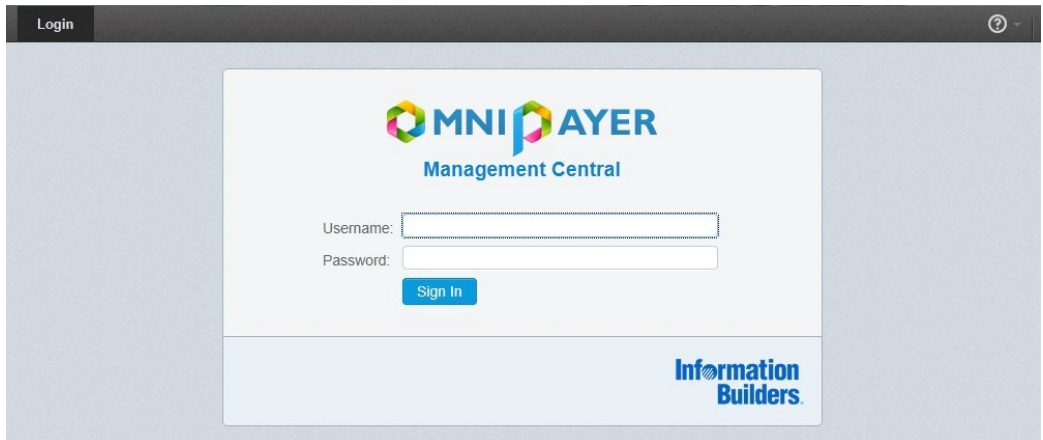
## Topics:

- ❑ Login Page
- ❑ Home Page (Domain Main Page)
- ❑ Performing Simple Searches for Golden Records
- ❑ Performing Advanced Searches for Golden Records
- ❑ Search Results Page
- ❑ Details 360 Page
- ❑ Master Comparison Page
- ❑ Master Comparison Page of Historic Records
- ❑ Compare Source Page

## Login Page

All users of Omni-Payer 360 Viewer are required to log in using a valid user name and password to configure and use the application.

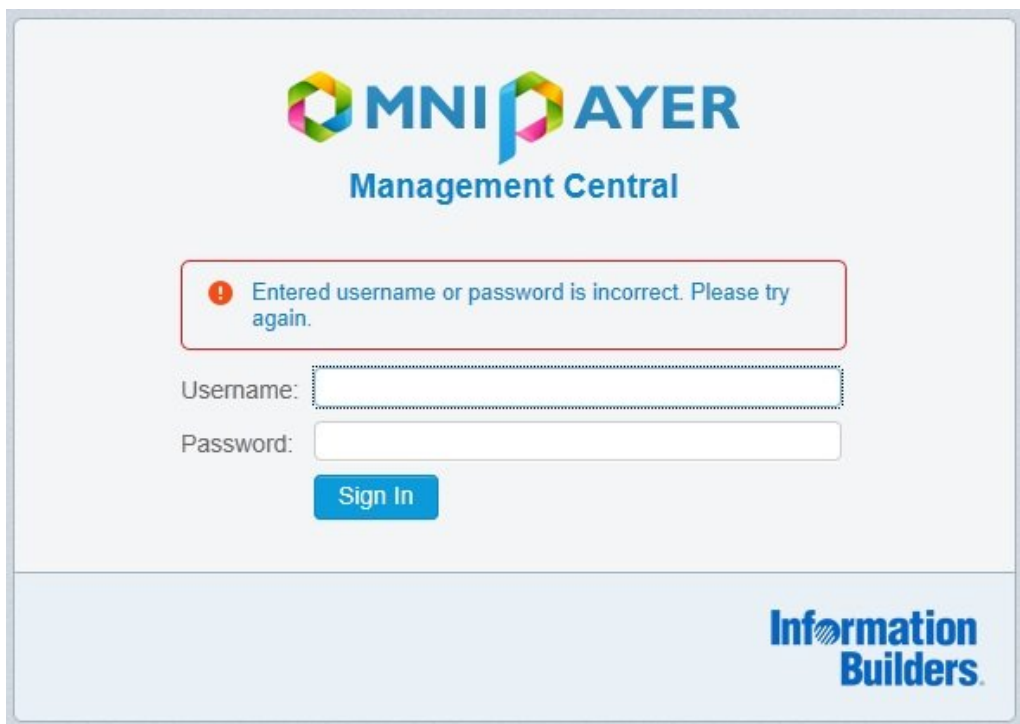
The following image shows the login page of Omni-Payer 360 Viewer that is displayed.



If a valid user name and password is provided during the log in attempt, you are automatically redirected to the Home page.



If an invalid user name or password is provided during the log in attempt, a message indicating that invalid credentials were entered, as shown in the following image.



The screenshot displays the login interface for 'OMNI-PAYER Management Central'. At the top center is the logo, which consists of a colorful geometric icon followed by the text 'OMNI-PAYER' in blue and 'Management Central' in a smaller blue font below it. Below the logo, a red-bordered box contains an error message: a red exclamation mark icon followed by the text 'Entered username or password is incorrect. Please try again.' in blue. Underneath this box are two input fields: 'Username:' followed by a text box and 'Password:' followed by a text box. A blue 'Sign In' button is positioned below the password field. In the bottom right corner of the page, the 'Information Builders' logo is visible.

Once you have logged in, you can log out at any point by clicking the *Logout* button, which is located in the upper-right corner of every page. After you have logged out, you are automatically redirected to the Login page.

## Home Page (Domain Main Page)

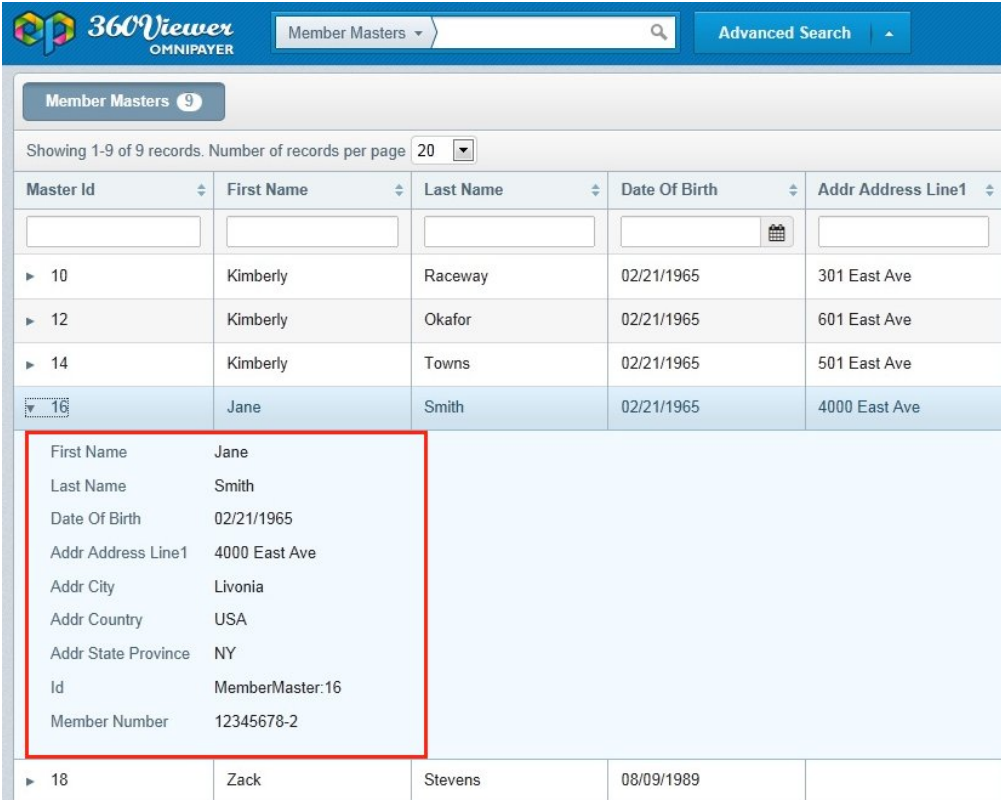
After logging into Omni-Payer 360 Viewer, you are automatically redirected to the Home page (Domain main page). You can view a list of records for the current domain in the system. The list of domains and default current domain are metadata driven and can be configured using the Admin Console. For more information, see [Using the Admin Console](#) on page 69.

By default, only the first 20 records are retrieved from the database and displayed. You can select the number of records that should be displayed per page and navigate to the next pages to additional records. Table columns can be configured using the Admin Console. For more information, see [Using the Admin Console](#) on page 69.

Master Id	First Name	Last Name	Date Of Birth	Addr Address	Addr City	Addr State	Omni Modified	Master Status	Issues	Actions
▶ 10	Kimberly	Raceway	02/21/1965	301 East Ave	Livonia	NY	07/15/2015	A		
▶ 12	Kimberly	Okafor	02/21/1965	601 East Ave	Livonia	NY	07/15/2015	A		
▶ 14	Kimberly	Towns	02/21/1965	501 East Ave	Livonia	NY	07/15/2015	A		
▶ 16	Jane	Smith	02/21/1965	4000 East Ave	Livonia	NY	07/15/2015	A		
▶ 18	Zack	Stevens	08/09/1989				07/15/2015	A		
▶ 2	Kimberly	Branch	02/21/1965	101 East Ave	Livonia	NY	07/15/2015	A		
▶ 4	Emma	Biers	07/22/1956				07/15/2015	A		
▶ 6	Kimberly	Bryant	02/21/1965	401 East Ave	Livonia	NY	07/15/2015	A		
▶ 8	Kimberly	Hightower	02/21/1965	201 East Ave	Livonia	NY	07/15/2015	A		

You can retrieve a preview of a record. Note that the columns that are displayed can be configured by a system administrator. For more information, see [Using the Admin Console](#) on page 69.

The Preview panel is displayed when you click anywhere on the record row. The row is highlighted when hovering your mouse pointer to indicate that the specific row can be clicked. The Preview panel is closed when you click the same record a second time or when another row is clicked. As a result, only one preview panel can be opened at a time.



The screenshot shows the Omni-Payer 360 Viewer interface. At the top, there is a search bar with "Member Masters" selected and an "Advanced Search" button. Below the search bar, a table displays a list of records. The table has columns: Master Id, First Name, Last Name, Date Of Birth, and Addr Address Line1. The record for Jane Smith (Master Id 16) is highlighted. Below the table, a preview panel is displayed, showing detailed information for the selected record.

Master Id	First Name	Last Name	Date Of Birth	Addr Address Line1
10	Kimberly	Raceway	02/21/1965	301 East Ave
12	Kimberly	Okafor	02/21/1965	601 East Ave
14	Kimberly	Towns	02/21/1965	501 East Ave
16	Jane	Smith	02/21/1965	4000 East Ave
18	Zack	Stevens	08/09/1989	

Showing 1-9 of 9 records. Number of records per page 20

Preview panel details for Jane Smith (Master Id 16):

- First Name: Jane
- Last Name: Smith
- Date Of Birth: 02/21/1965
- Addr Address Line1: 4000 East Ave
- Addr City: Livonia
- Addr Country: USA
- Addr State Province: NY
- Id: MemberMaster:16
- Member Number: 12345678-2

You can switch to another domain using the domain drop-down menu in the search panel. When another domain is selected, the Home page (Domain main page) is reloaded to display the records for the selected domain. It is also possible to select all of the available domains clicking the *All* option from the domain drop-down menu. The list of available domains that are displayed in the domain drop-down menu can be configured using the Admin Console. For more information, see [Using the Admin Console](#) on page 69.

You can navigate to the Details 360 page by clicking *Details 360* or display the Master Comparison page by clicking *Master Comparison* to view golden records and their supporting instance records.

## Performing Simple Searches for Golden Records

You can initiate a simple search by entering data into the simple search input field and pressing *Enter* or clicking *Search*. The selected domain (for example, Member and Provider) is scanned for a match based on the first name, last name, or specific identifier that you entered. You can select a specific domain to locate records from the domain drop-down menu in the search panel. Wildcard searches are supported. The scope of the search is defined by the domain that is currently selected.

The search results have the same format as a list of records that is displayed on the Home page (Domain main page).

## Performing Advanced Searches for Golden Records

If you are required to enter additional parameters to locate records, then you can use the Advanced Search facility for this purpose, which can be accessed by clicking the *Advanced Search* button.

The screenshot shows the 'Advanced Search' modal window in the 360Viewer application. The interface includes a header with the 360Viewer logo and a search bar. Below the header, there are two tabs: 'Member Masters' and 'Provider Masters', with a red arrow labeled '1' pointing to the 'Provider Masters' tab. The main area is divided into two sections: 'Frequent' and 'General'. The 'Frequent' section contains input fields for 'Keyword', 'Last Name', 'Addr City', 'Date Of Birth', and 'Omni Created Date'. The 'General' section contains input fields for 'First Name', 'Addr Address Line1', 'Addr State Province', 'Id', and 'Omni Modified Date'. A red arrow labeled '2' points to the 'Frequent' section. At the bottom of the modal, there are three buttons: 'Search', 'Clear', and 'Close', with a red arrow labeled '3' pointing to the 'Search' button. On the right side of the modal, there is a link 'or try search' and a link 'Instances', with a red arrow labeled '4' pointing to the 'Instances' link.

The Advanced Search page contains the following areas:

- 1. Domain tabs.** Allow you to change domain for search.
- 2. Grouped attribute areas.** Allow you to enter search parameters.
- 3. Search, Clear, and Close buttons.** Allow you to execute searches, clear specified criteria, and close the search overlay without executing the search.
- 4. Subdomain links.** Allow you to search by subdomain record parameters. The list of displayed subdomains can be configured in the Admin Console. For more information, see [Using the Admin Console](#) on page 69.

The attributes in the Advanced Search page are grouped into sections that can be configured in the Admin Console. For more information, see [Using the Admin Console](#) on page 69. This makes it easier for you to find the required attribute. Only one section can be expanded at once. When another section header is clicked, the new section is opened and the previously opened section is closed.

After the Search button is clicked, the search overlay is hidden and the search is executed.

The Clear button deletes all entered criteria, except for the value in the Keyword, which can be only manually deleted.

If you click the Close button, the search overlay is hidden without executing the search or updating the search results. The parameters that you enter are cleared and returned to the state they were in as of the last advanced search that was performed.

When an advanced search is used to refine simple search results, the *Keyword* field is populated with what was entered before in the simple search input field. The final query is combined with the keyword search and any additional attributes.

If you edit the value in the Keyword field and perform an advanced search, the value in the simple search input field is overwritten with the new value.

If you already have results from an advanced search and return to the search overlay to edit the search criteria, the values you entered for your previous query are preserved.

In addition, validation mechanism for numeric fields and fields with date formats work for domain and subdomain pages. When invalid data is entered and you click Search, a message indicating invalid data is displayed and the corresponding field is highlighted in red, as shown in the following image.

If you want to perform an advanced search by subdomain, click on the appropriate subdomain link and a search overlay is populated with fields. These fields can be configured in the Admin Console for a specific subdomain. For more information, see [Using the Admin Console](#) on page 69.

Every subdomain page includes a Return to <name\_of\_domain> button, that allows you to return to the search results by domain, as shown in the following image.

Search for **Member Masters** **Provider Masters**

[Return to Member Masters](#)

**General**

Id  E Mail

Addr Address Line1  Addr Address Line2

Addr Address Line3  Addr Address Line4

Addr City  Addr Country

Addr County Region  Addr Postal Code

Addr State Province  Date Of Birth

Date Of Death

Search Results Page

After a simple search is performed by the specified criteria, the results are returned as rows in the Search results page, as shown in the following image.

360 Viewer Data Dictionary PRIMARY/user\_pay (group.GRP 2, User) Logout

360Viewer OMNIPAYER Member Masters kimberly Advanced Search

Home Search results Member Masters + Keyword: kimberly

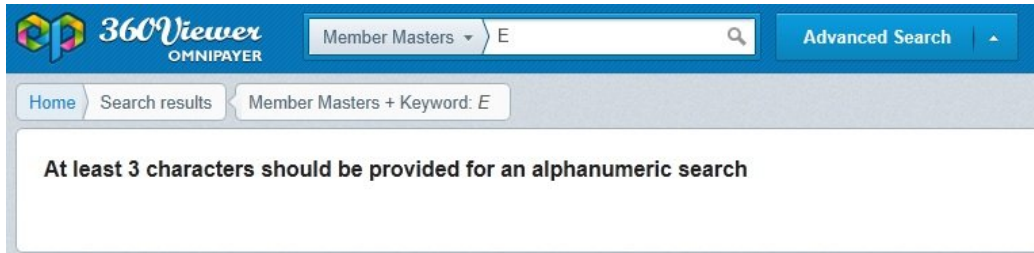
Member Masters 6

Showing 1-6 of 6 records. Number of records per page 20

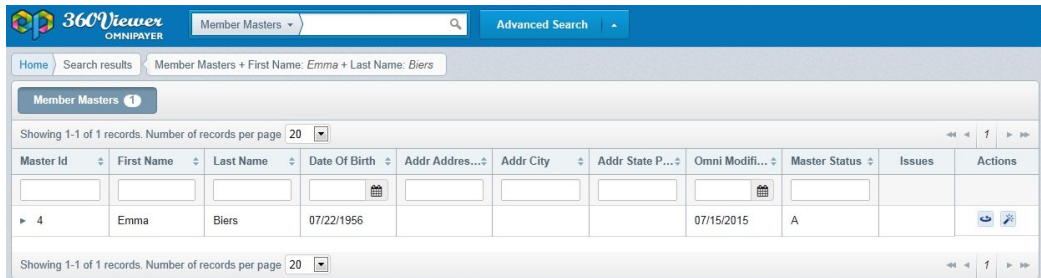
Master Id	First Name	Last Name	Date Of Birth	Addr Address...	Addr City	Addr State P...	Omni Modifi...	Master Status	Issues	Actions
10	Kimberly	Raceway	02/21/1965	301 East Ave	Livonia	NY	07/15/2015	A		
12	Kimberly	Okafor	02/21/1965	601 East Ave	Livonia	NY	07/15/2015	A		
14	Kimberly	Towns	02/21/1965	501 East Ave	Livonia	NY	07/15/2015	A		
2	Kimberly	Branch	02/21/1965	101 East Ave	Livonia	NY	07/15/2015	A		
6	Kimberly	Bryant	02/21/1965	401 East Ave	Livonia	NY	07/15/2015	A		
8	Kimberly	Hightower	02/21/1965	201 East Ave	Livonia	NY	07/15/2015	A		

Showing 1-6 of 6 records. Number of records per page 20

A validation mechanism exists for simple search functionality. If you perform a simple search using less than 3 alphanumeric characters, the following message is displayed in the Search results page.

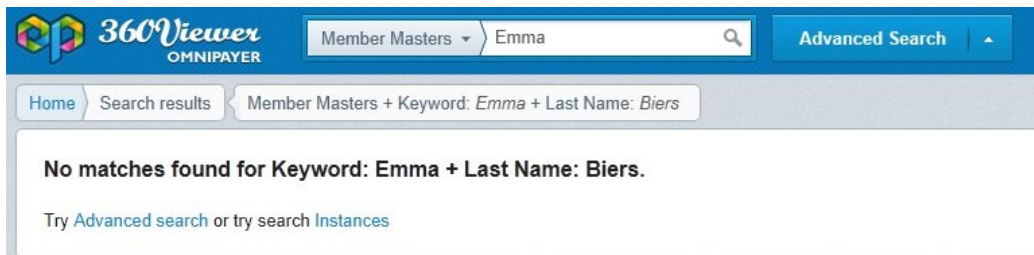


After an advanced search is performed by the specified criteria, the results in table format along with the search criteria are returned. The Domain drop-down menu indicates the domain used by which the Advanced Search was performed.



You can navigate to the Details 360 page by clicking *Details 360* or display the Master Comparison page by clicking *Master Comparison* to view golden records and their supporting instance records.

If you perform a search using non-existing criteria, the following type of message is displayed in the Search results page.



This same mechanism works for advanced search functionality, but the breadcrumb trail will also contain the search criteria.



## Details 360 Page

To view detailed information for a specific record (for example, member), click the *Details 360* link for the appropriate record. The Details 360 link is available on the Home and Search results pages.

The data in the Details 360 page is represented by data from the domain record (Member Masters Record tab) and collections of surrounding data (for example, Names, Addresses, and Identifiers). You can switch between these categories using tabs on the top of the page. For more information, see [Using the Admin Console](#) on page 69.

The data from the domain record is also divided into sections (for example, General), which can be collapsed and expanded, as shown in the following image.

The screenshot shows the 360Viewer OMNIPAYER interface. The top navigation bar includes '360 Viewer', 'Data Dictionary', and a user profile 'PRIMARYUser\_pay (group.GRP 2, User)' with a 'Logout' button. Below the navigation bar, there's a search bar with 'Member Masters' selected and an 'Advanced Search' button. The main content area has tabs for 'Member Masters', 'Identifiers', 'Names', 'Addresses', 'Emails', and 'Phone Numbers'. The 'Member Masters' tab is active, showing a table of member information. The table has columns for various fields, and the 'General' section is expanded, displaying the following data:

Full Name	Kimberly E. Towns
Addr Address Line1	501 East Ave
Addr Address Line2	Suite 555
Addr City	Livonia
Addr Country	USA
Addr County Region	Livingston
Addr Postal Code	14488
E Mail	
Addr State Province	NY
Date Of Birth	02/21/1965
Date Of Death	02/21/2050
Deceased Flag Code	N
Deceased Flag Code Description	N
Deceased Flag Code Id	SourceCode:Cdw:0136.N
Ethnic Group Code	H
Ethnic Group Code Description	H
Ethnic Group Code Id	SourceCode:Cdw:0189.H

By default, all of the sections are expanded. To collapse or expand a section, click on the section name. Sections and their properties can be configured using the Admin Console. For more information, see [Using the Admin Console](#) on page 69.

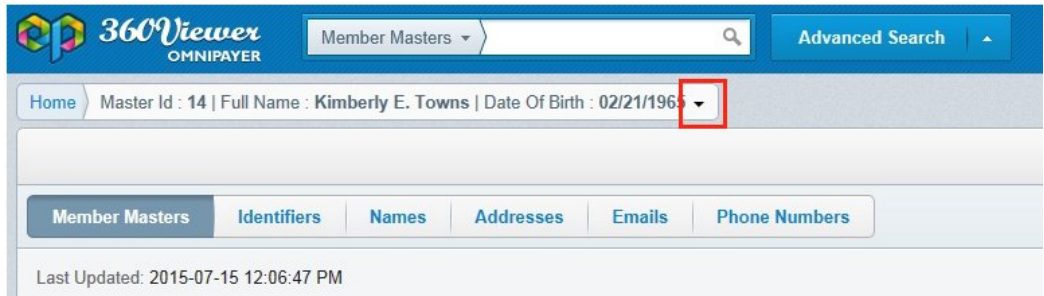
The Names tab for a subdomain displays all of the names that existed in the Member Masters domain. The same mechanism works for other subdomains.



When you click a specific table row, the Preview panel is displayed, which contains more detailed information associated with the record. The view that is displayed in the Preview pane can be configured using the Admin Console. For more information, see [Using the Admin Console](#) on page 69.

You can configure column sizes, alignment of columns, and specify what columns can be sorted and filtered using the Admin Console. For more information, see [Using the Admin Console](#) on page 69.

There is a drop-down menu in the breadcrumbs trail where you can view information about the supporting instance records, as shown in the following image.



## Master Comparison Page

### In this section:

- Using the Instance Records Overlay Window
- Performing Simple Searches for Instance Records
- Performing Advanced Searches for Instance Records
- Viewing the Search Results Page for Instance Records

Using the Master Comparison page, you can compare instance records with golden records, and other instance records.

To access the Master Comparison page for a golden record, click the Master Comparison link for the appropriate record on the Home page or Search Results page.

The screenshot displays the 360 Viewer interface for a Master Comparison page. At the top, the header includes the 360 Viewer logo, a search bar, and navigation links. The main content area is titled 'Golden Record' and features a 'Record Properties' sidebar on the left. The sidebar contains fields for Version (1), First Name (Kimberly), Last Name (Bryant), Date Of Birth (02/21/1965), and Master Id (6). The main table lists various attributes such as Full Name, Address, Date Of Birth, and Race Code. A sidebar on the right contains tabs for General, Identifiers, Names, Addresses, Emails, and Phone Numbers. Red callouts are placed over the interface: 1 points to the 'View History' button, 2 points to the 'Show Instances' link, 3 points to the 'Record Properties' sidebar, 4 points to the main attribute table, and 5 points to the 'Identifiers' tab.

Attribute	Value
Full Name	Kimberly E. Bryant
Addr Address Line1	401 East Ave
Addr Address Line2	Suite 555
Addr City	Livonia
Addr Country	USA
Addr County Region	Livingston
Addr Postal Code	14488
E Mail	
Addr State Province	NY
Date Of Birth	02/21/1965
Date Of Death	02/21/2050
Deceased Flag Code	N
Deceased Flag Code Description	N
Deceased Flag Code Id	SourceCode:Cdw:0136:N
Ethnic Group Code	H
Ethnic Group Code Description	H
Ethnic Group Code Id	SourceCode:Cdw:0189:H
Race Code Description	2106-3
Race Code Id	SourceCode:Cdw:0005:2106-3
Subscriber Policy Number	40145678
Subscriber Relationship Code	SPO
Subscriber Relationship Code Description	SPO
Subscriber Relationship Code Id	SourceCode:Cdw:0063:SPO
Tax Id	401-12-4014
Tax Id Type Code	SS
Tax Id Type Code Description	SSN
Tax Id Type Code Id	SourceCode:Cdw:0203:SS
Transaction Id	d4bebf55-126d-4d26-87bf-381362eb38f1
Written Language Code	ENG
Written Language Code Description	ENG
Written Language Code Id	SourceCode:Cdw:0296:ENG

The Master Comparison page contains the following areas:

- 1. View History button.** Allows you to view a list of versions for the golden record.
- 2. Show Instances link.** Expands the instance records section.

**3. Record Properties section.****4. Grouped attribute section(s).****5. Subdomain(s) section(s).**

The Record Properties section includes the version number, record ID, and the last modified date on the top of the page and can be configured using the Admin Console. For more information, see [Using the Admin Console](#) on page 69.

By default, only golden record data is displayed on the Master Comparison page.

The data is organized into sections that can be configured using the Admin Console. For more information, see [Using the Admin Console](#) on page 69.

The collection of items, which represent subdomain data, are displayed hierarchically in expandable sections (collapsed by default) and can also be configured using the Admin Console. For more information, see [Using the Admin Console](#) on page 69.

To view all instance records that correspond to the current golden record selected, click the Show Instances link. This link displays the number of instance records for the golden record. When you click this link, the candidate section is expanded to the right of the golden record.

For easy comparison, the information for the instance records is displayed next to the golden record. Attribute values in each instance record that are different from the attribute values in the golden record are highlighted in pink. The values that are common (standardized) to both records (golden and instance) are highlighted in yellow.

The Record Properties section for instance records displays the Source Name, Source Instance ID, and the last modified date. The properties for this view can be configured using the Admin Console. For more information, see [Using the Admin Console](#) on page 69.

HomeMaster Id : 6 | Full Name : Kimberly E. Bryant | Date Of Birth : 02/21/1965Details 360

Golden Record

Hide InstancesInstance Records1

Record Properties

Version: 1  
First Name: Kimberly  
Last Name: Bryant  
Date Of Birth: 02/21/1965  
Master Id: 6

Full Name: Kimberly E. Bryant  
Id: Member:Cdw:MetLife\_401

General

Full Name	Kimberly E. Bryant	Kimberly E. Bryant
Addr Address Line1	401 East Ave	401 East Ave
Addr Address Line2	Suite 555	Suite 555
Addr City	Livonia	Livonia
Addr Country	USA	USA
Addr County Region	Livingston	Livingston
Addr Postal Code	14488	14488
E Mail		a.b@company.com
Addr State Province	NY	NY
Date Of Birth	02/21/1965	02/21/1965
Date Of Death	02/21/2050	02/21/2050
Deceased Flag Code	N	N
Deceased Flag Code Description	N	N
Deceased Flag Code Id	SourceCode:Cdw:0136:N	SourceCode:Cdw:0136:N
Ethnic Group Code	H	H
Ethnic Group Code Description	H	H
Ethnic Group Code Id	SourceCode:Cdw:0189:H	SourceCode:Cdw:0189:H

Subdomains are essential attributes of a golden record that are not uniquely identified in the record. Subdomains are almost always a many-to-one relationship with the base record. These subdomains could include names, addresses, and contact information (for example, email addresses, phone numbers, and so on). However, one instance record may have two names in a collection, and another instance may have three. The resulting golden record may be a *union* of values across instance records.

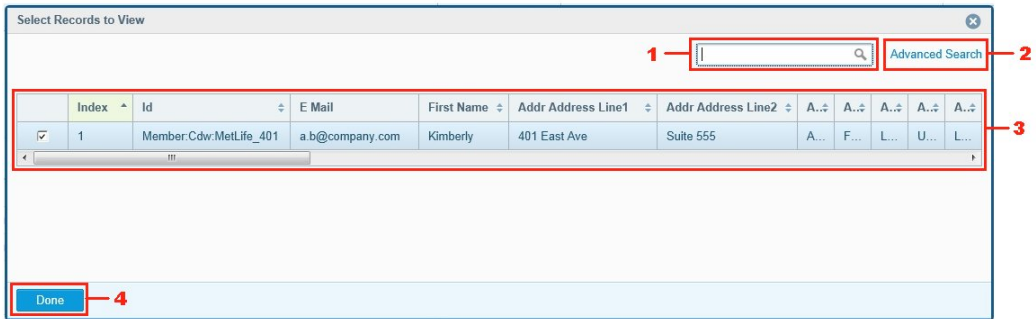
Instance records could have a different number of items in their collections and not all items are used to compose the golden record. The items that are used in a golden record are highlighted with a green border. Values of attributes in each instance record that are different from the attribute value in the golden record itself are highlighted in pink. The values that are common (standardized) to both records (golden and instance) are highlighted in yellow.

Using the Instance Records Overlay Window

The Instance Records overlay window contains the following areas:

1. Simple Search input.

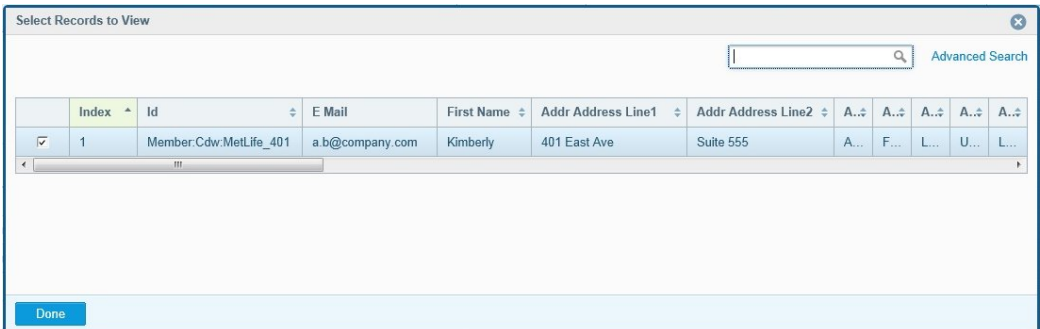
- 2. Advanced Search link.** Opens the Advanced Search page.
- 3. List of Instance records.** Shows all instances or search results.
- 4. Done button.** Closes the dialog and displays only the selected instance records on the Master Comparison page.



When there are many instance records corresponding to the current golden record, you can open the full list of instance records and select some records to be displayed in Comparison mode. You can also search the desired instance record by performing a simple search or leveraging the advanced search by using all of the attributes that are available.

When you click on the title of the instance records section, you receive a list of all instance records corresponding to the current golden record. All the records in the list are selected by default. If the list is long, then a scrollbar inside the overlay window is included. For each instance record, the Source Name, Source Instance ID, and the last modified date are displayed. The fields that are displayed can be configured using the Admin Console. For more information, see [Using the Admin Console](#) on page 69.

Currently displayed records are selected and highlighted. To select or deselect records, select or deselect the appropriate check boxes. When you are finished with your selections, click *Done* to close the overlay window and refresh the Comparison view to show the selected instance records.



## Performing Simple Searches for Instance Records

You can perform a simple or advanced search to narrow the list of instance records. This search mechanism is similar to the search of golden records. However, there is no validation of minimum alphanumeric characters performed for a simple search. Wildcard searches are also supported. A scope of the search is defined by the currently displayed golden record.

## Performing Advanced Searches for Instance Records

To search by different parameters (for example, to find all instance records that have a particular DOB, the same as in the golden record), you can leverage the advanced search. When you click *Advanced Search*, the overlay window is enlarged. You can enter any number of search criteria and then click *Search*.

Search Instance Records

☒ Frequent  
☒ General

Address Line1  
Address Line2  
Address Line3  
Address Line4  
Address Usage Comment  
Adopted Code  
Ambulatory Status Code  
Bad Debt Code  
Birth Order  
Blind Code  
Care Language Code  
Cause Of Death  
Citizenship Code  
City

Search Clear Back to Instances

or try search Addresses Names

2 3 1 4

The Advanced Search page contains the following areas:

- 1. Grouped attribute areas.** Used to set search parameters.
- 2. Search and Clear buttons.**
- 3. Back to Instances link.**
- 4. Subdomain links.** Allow you to search by subdomain record parameters. The list of displayed subdomains can be configured in the Admin Console. For more information, see [Using the Admin Console](#) on page 69.

The attributes in the Advanced Search dialog are grouped into sections to make it easier for you to find the necessary attribute. This can be configured using the Admin Console. For more information, see [Using the Admin Console](#) on page 69. Only one section can be expanded at once. When another section header is clicked, the new section is opened and the previously opened one is closed.

After the Search button is clicked, the list of search results, which consists of matching instance records corresponding to the current golden record, is displayed.

The Clear button deletes all entered criteria, except for the value in the Keyword field. The value in the Keyword field can be only cleared manually.

After the Back to Instances link is clicked, the Advanced Search dialog is closed and the instance records overlay window is displayed.

When an advanced search is used to refine simple search results, the Keyword attribute is populated with the value entered in the Simple Search input field. The final query is combined with the Keyword search and additional attributes.

If you edit the formerly filled in Keyword field and perform an advanced search, the value in the Simple Search input field is overwritten with the new value.

If you already received advanced search results and return to the search overlay to edit search criteria, the values that you entered in your previous query are preserved.

There is a validation mechanism for numeric fields and fields with date format. It works for domain and subdomain pages.

After invalid data is entered and you click *Search*, an appropriate message is displayed and the corresponding field is highlighted in red, as shown in the following image.

The screenshot shows the 'Search Instance Records' window. At the top, a red error banner contains two messages: 'Invalid value 'test' entered in 'Gyn Expected Delivery Date' field. Value must be date: [format: MM/dd/yyyy]' and 'Invalid value 'test' entered in 'Habit Alcohol Ounces' field. Value must be numeric.' Below the banner, the form is divided into two columns of input fields. The 'Gyn Expected Delivery Date' field in the right column and the 'Habit Alcohol Ounces' field in the left column are highlighted with a red border. At the bottom, there are 'Search', 'Clear', and 'Back to Instances' buttons, along with a search bar and links for 'Addresses' and 'Names'.

When you want to perform an advanced search by subdomain, click the appropriate subdomain link and the search overlay is populated with fields. These fields can be configured using the Admin Console for a specific subdomain. For more information, see [Using the Admin Console](#) on page 69.

Every subdomain page includes a Return to <name\_of\_domain> button, that allows you to return to the search results by domain, as shown in the following image.

The screenshot shows the 'Search Instance Records' window. A red box highlights the 'Return to Patients' button, which has a small '1' next to it. Below the button, the 'General' tab is selected, showing a form with fields for 'Address Line1', 'Address Line2', 'Address Line3', 'Address Line4', 'Address Type', 'City', 'End Date', 'Id', and 'Omni Status'. At the bottom, there are 'Search', 'Clear', and 'Back to Instances' buttons.



## Viewing the Search Results Page for Instance Records

After a simple search was performed using existing criteria, the resulting rows are displayed, as shown in the following image.

The screenshot shows a dialog box titled "Select Records to View" with a search bar containing "Emily" and an "Advanced Search" link. Below the search bar, the "Search Results" section displays a table with three rows, all of which are selected by default (indicated by checked checkboxes in the first column).

		Source Name	Omni Modified Date	Source Instance Id
<input checked="" type="checkbox"/>	1	ALLSCRIPTS		Member_10
<input checked="" type="checkbox"/>	2	ALLSCRIPTS		Member_11
<input checked="" type="checkbox"/>	3	ALLSCRIPTS		Member_12

A "Done" button is located at the bottom left of the dialog box.

All of the records are selected by default.

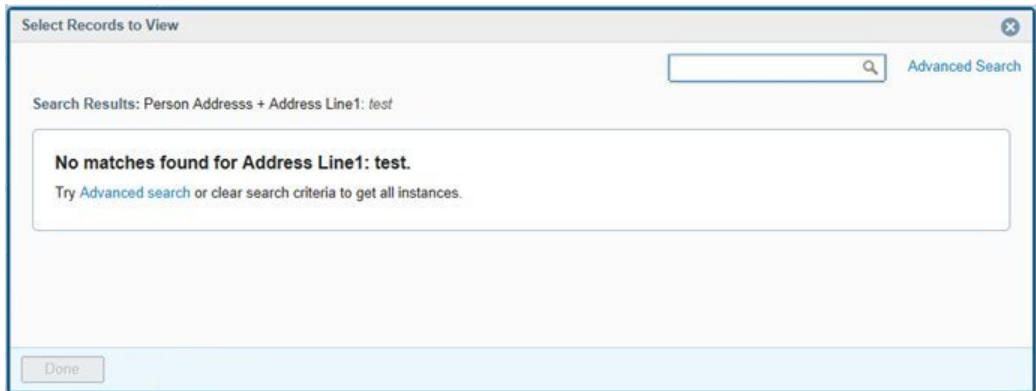
For the Advanced Search results page, the search query parameters are summarized above the search results, as shown in the following image.

The screenshot shows a dialog box titled "Select Records to View" with a search bar containing "Emily" and an "Advanced Search" link. Below the search bar, the "Search Results: Members + Keyword: Emily" section displays a table with three rows, all of which are selected by default (indicated by checked checkboxes in the first column).

		Source Name	Omni Modified Date	Source Instance Id
<input checked="" type="checkbox"/>	1	ALLSCRIPTS		Member_10
<input checked="" type="checkbox"/>	2	ALLSCRIPTS		Member_11
<input checked="" type="checkbox"/>	3	ALLSCRIPTS		Member_12

A "Done" button is located at the bottom left of the dialog box.

When you perform a search using invalid search criteria, an appropriate message is displayed on the Search results page, as shown in the following image.

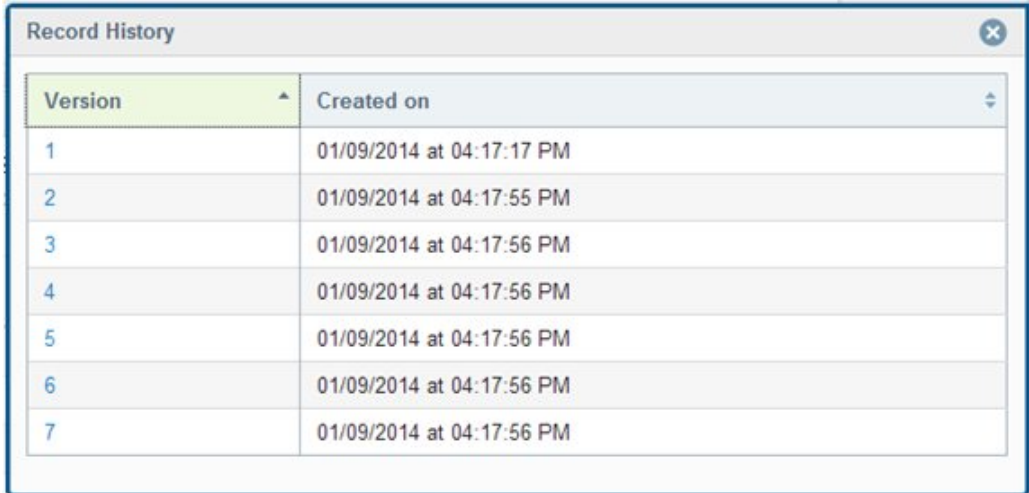


You can navigate to the Advanced Search dialog by clicking the *Advanced Search* link or go back to the full list of instances if you click *Done*.

## Master Comparison Page of Historic Records

For each golden record, a history of versions is also tracked. You can view this list of versions with indications of changes in a specific version. You can also select a version to see all the values of golden records and instance records in that version, and leverage the compare functionality to view differences between opened versions and current/previous versions of the golden record.

When you click View History, the overlay window is displayed, which shows a list of all versions of the golden record. The version number and creation date are displayed for each record, as shown in the following image.



The image shows an overlay window titled "Record History" with a close button in the top right corner. Inside the window is a table with two columns: "Version" and "Created on". The "Version" column contains numbers 1 through 7, and the "Created on" column contains timestamps from 01/09/2014 at 04:17:17 PM to 04:17:56 PM. The version numbers are blue and underlined, indicating they are clickable links.

Version	Created on
<a href="#">1</a>	01/09/2014 at 04:17:17 PM
<a href="#">2</a>	01/09/2014 at 04:17:55 PM
<a href="#">3</a>	01/09/2014 at 04:17:56 PM
<a href="#">4</a>	01/09/2014 at 04:17:56 PM
<a href="#">5</a>	01/09/2014 at 04:17:56 PM
<a href="#">6</a>	01/09/2014 at 04:17:56 PM
<a href="#">7</a>	01/09/2014 at 04:17:56 PM

To navigate to the Master Comparison page for any version, click the version number link.

When a version that is not current is selected, a NOT CURRENT label is displayed, as shown in the following image.

HomeSearch resultsUEMID # PatientMaster:214v.7NOT CURRENT

Golden Record

Hide Instances

Instance Records1

Compare

Record Properties

Version: 7  
Master Id: 214  
Omni Modified Date:

Source Name: ALLSCRIPTS  
Omni Modified Date:  
Source Instance Id: Patient\_10

Demographics

Date Of Birth1977-07-22T00:00:001977-07-22T00:00:00

GenderFemaleFemale

Gender CodeFF

Mothers Maiden NameCrownCrown

Marital StatusMarriedMarried

Marital Status CodeMM

CitizenshipUNITED STATESUNITED STATES

Citizenship CodeUSAUSA

Ethnicity

EthnicityNot Hispanic or LatinoNot Hispanic or Latino

Ethnic Group CodeNN

RaceWhiteWhite

Race CodeWHWH

Master Child Id

Master Created Date

Master Modified Date

Class

Owning Master Object Type

Status

Status Reason

Names

Addresses

You can return to the current version using the breadcrumb trail to the left of the page title.

The structure of this page is similar to the current version of a golden record and can be configured in the same view using the Admin Console. For more information, see [Using the Admin Console](#) on page 69.

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iWay Software

The only functionality that is accessible for non-current versions of a golden record is the Compare option, as shown in the following image.



There are several values that you can select for the Compare option.

- ❑ **Compare with current.** The differences between the selected version and the current version are highlighted.
- ❑ **Compare with previous.** The differences between the selected version and the previous version (version N-1 where N - selected version) are highlighted.
- ❑ **Select version.** A model is displayed where you can select the version you want to compare against.
- ❑ **Clear Comparison.** Clears comparison highlighting.

To select a value for the Compare option, click on the down arrow next to the Compare button and select the value from the drop-down list.

As a result, highlighted in blue are the golden record attributes that are different from the version you compared against. By hovering over the value, you can see the appropriate value in the compared version.

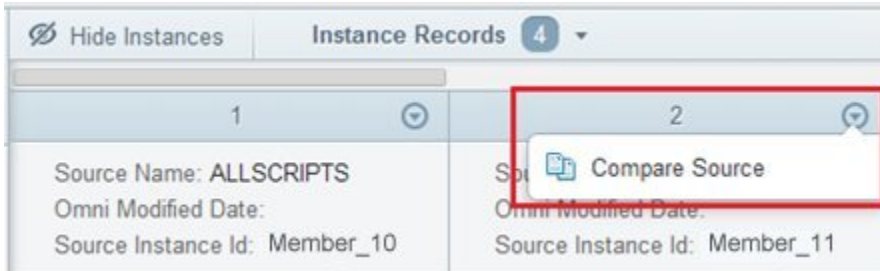
[Home](#)
[Search results](#)
UEMID # PatientMaster214
v.7
NOT CURRENT

Compare with Version 1

Golden Record		<a href="#">Hide Instances</a> Instance Records <span>1</span>
<b>Record Properties</b> Version: 7 Master Id: 214 Omni Modified Date:	Source Name: ALLSCRIPTS Omni Modified Date: Source Instance Id: Patient_10	
<b>Demographics</b>		
Date Of Birth	1977-07-22T00:00:00	1977-07-22T00:00:00
Gender	Female	Female
Gender Code	F	F
Mothers Maiden Name	Crown	Crown
Marital Status	Married	Married
Marital Status Code	M	M
Citizenship	UNITED STATES	UNITED STATES
Citizenship Code	USA	USA
<b>Ethnicity</b>		
Ethnicity	Not Hispanic or Latino	Not Hispanic or Latino
Ethnic Group Code	N	N
Race	White	White
Race Code	WH	WH
Master Child Id		
Master Created Date		
Master Modified Date		
Class		
Owning Master Object Type		
Status		
Status Reason		
<b>Names</b>		
<b>Addresses</b>		

## Compare Source Page

For each instance record, you can compare all of its values with values from the source system. Open an instance record context menu by clicking on the icon next to the instance record title and select *Compare Source*, as shown in the following image.



On the Compare Source page, the details of the instance record are displayed on the left and corresponding source record details are displayed on the right side of the page.

The instance record format is presented in a similar to the format of a golden record on the Master Comparison page.

The Compare Source page contains the following areas:

- 1. Records properties.**
- 2. Grouped attribute sections.**
- 3. Subdomain section(s).**





# 4 | Using Omni-Payer Data Dictionary

This section describes how to configure and use Omni-Payer Data Dictionary.

## Topics:

- Introduction
- Omni-Payer Data Dictionary Page Structure
- Using the Administration Console to Configure Properties for Code Sets and Database Objects

## Introduction

### In this section:

#### Page Overview

Omni-Payer Data Dictionary is a separate component of Omni-Payer Management Central (OPMC). The data dictionary provides a detailed view of the source system and Omni-Payer metadata, as well as reporting data mart metadata. Omni-Payer Data Dictionary currently contains the following modules:

- ❑ Code Sets Viewer
- ❑ Database Objects Viewer

### Page Overview

The Code Sets Viewer displays mappings between code sets from the available source systems and content of the code sets themselves. You can browse a list of code sets and view a table displaying the mappings between code sets in a source system belonging to a customer and Omni-Payer.

The Database Objects Viewer shows the table and column details of the databases from which the data is imported into Omni-Payer. From the available drop-down list, you can select the various databases that are available, and select any node (table or column) in the left pane to view descriptive information for that node in the right pane.

## Omni-Payer Data Dictionary Page Structure

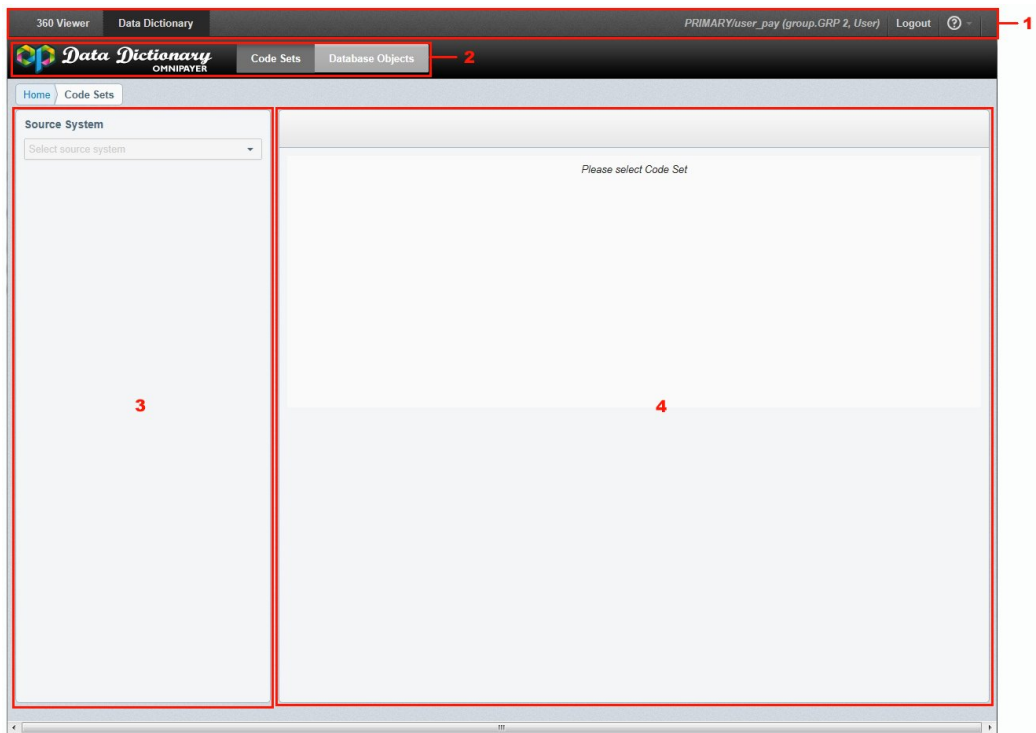
### In this section:

Top Panel

Code Sets Viewer

Database Objects Viewer

The Omni-Payer Data Dictionary page uses a common layout, as shown in the following image.



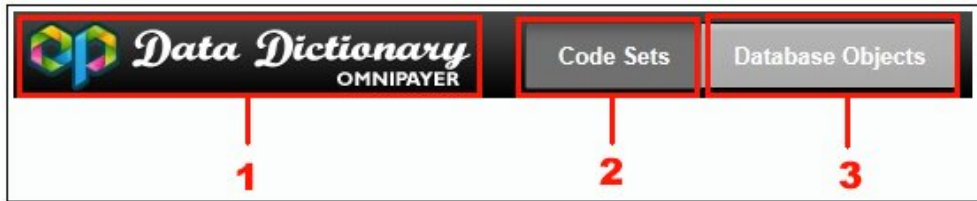
The Omni-Payer Data Dictionary page contains the following areas:

- 1.** Omni-Payer Management Central (OPMC) navigation menu.
- 2.** Top panel containing the Data Dictionary header and navigation tabs.
- 3.** Navigation panel.
- 4.** Details panel.

The OPMC navigation menu follows the standard behavior and allows you to navigate between the application modules.

## **Top Panel**

The following image shows the top panel of the Omni-Payer Data Dictionary page in more detail.



The top panel contains the following areas:

- 1.** Omni-Payer Data Dictionary logo.
- 2.** Code Sets tab.
- 3.** Database Objects tab.

## Code Sets Viewer

### In this section:

Navigation Panel

Searching Code Sets

Details Panel

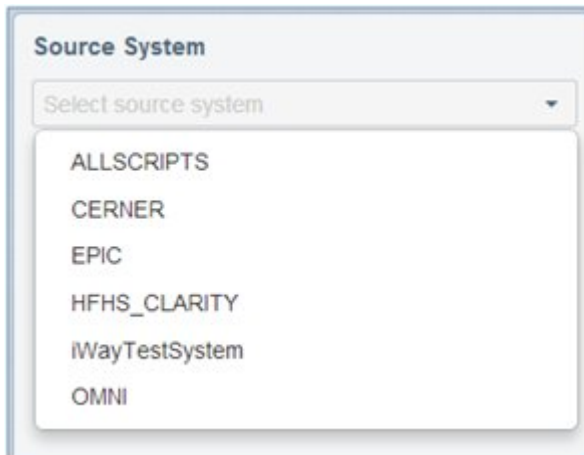
To navigate to the Code Sets tab, you must first click *Data Dictionary* in the Omni-Payer Management Central (OPMC) navigation menu. By default, before you select a source system from the drop-down list, the Details panel of the system is blank.

The screenshot displays the 'Code Sets' tab in the Omni-Payer Management Central. The interface is divided into a left navigation panel and a main details panel. The navigation panel includes a 'Source System' dropdown menu set to 'WayTestSystem', a 'Browse WayTestSystem' section with a search attribute field, and a list of code sets. The 'State Province' code set is selected. The main details panel shows a table of state province values with columns for Code, Code Description, Omni Code Set, and Set Name. The table lists 50 states and territories, each with a unique code and description. The table is paginated, showing 21-40 of 57 records.

Code	Code Description	Omni Code Set	Set Name
LA	Louisiana	US-LA	Louisiana
MA	Massachusetts	US-MA	Massachusetts
MD	Maryland	US-MD	Maryland
ME	Maine	US-ME	Maine
MI	Michigan	US-MI	Michigan
MN	Minnesota	US-MN	Minnesota
MO	Missouri	US-MO	Missouri
MP	Northern Mariana Islands	US-MP	Northern Mariana Islands (see also separate e...)
MS	Mississippi	US-MS	Mississippi
MT	Montana	US-MT	Montana
NC	North Carolina	US-NC	North Carolina
ND	North Dakota	US-ND	North Dakota
NE	Nebraska	US-NE	Nebraska
NH	New Hampshire	US-NH	New Hampshire
NJ	New Jersey	US-NJ	New Jersey
NM	New Mexico	US-NM	New Mexico
NV	Nevada	US-NV	Nevada
NY	New York	US-NY	New York
OH	Ohio	US-OH	Ohio
OK	Oklahoma	US-OK	Oklahoma

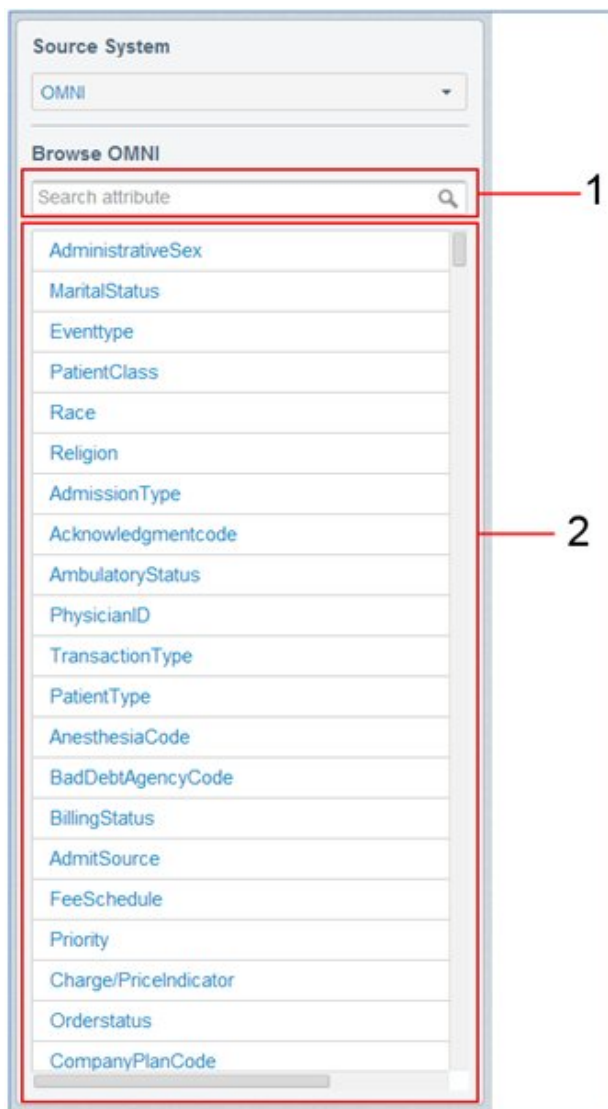
To begin working with code sets, you must select a source system from the Source System drop-down list in the Navigation panel.

The Source System drop-down list is populated with available source systems that can be selected, as shown in the following image.



## Navigation Panel

Once a source system is selected from the Source System drop-down list, the Navigation panel is populated with a list of corresponding code sets for the selected source system, as shown in the following image.



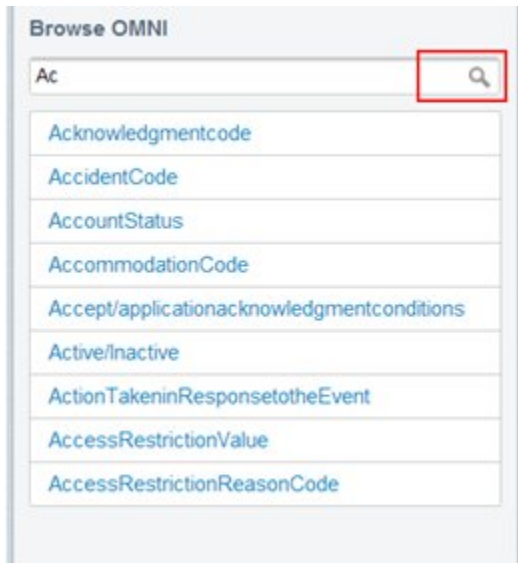
The Navigation panel contains the following areas:

1. Search field.

2. List of code sets for the selected source system.

## Searching Code Sets

A search field is available in the Navigation panel, which allows you to search through a list of code sets. To search through a list of code sets, enter your search terms in the field and click the search icon to the right of the field or press Enter, as shown in the following image.



**Note:** The behavior of the search is not case-sensitive and locates only those code sets, that begin with the search term entered.

To cancel a search, delete any search terms in the field and click the search icon to the right of the field or press Enter.

## Details Panel

You can select a specific node from the tree structure by clicking on the title of a subject area.



When you select a corresponding node, the Details panel displays the code set mapping information between the selected code set and Omni-Payer using a table format, as shown in the following image.

This code set contains the list of State Province values from iWayTestSystem source system.

1-20 of 57 records. Number of records per page: 20

Source Code Set		Omni Code Set		
Code	Code Description	Code	Code Description	Set Name
AR	Arkansas	US-AR	Arkansas	0347
AS	American Samoa	US-AS	American Samoa (see also separate en...	0347
AZ	Arizona	US-AZ	Arizona	0347
CA	California	US-CA	California	0347
CO	Colorado	US-CO	Colorado	0347
CT	Connecticut	US-CT	Connecticut	0347
DC	District of Columbia	US-DC	District of Columbia	0347
DE	Delaware	US-DE	Delaware	0347
FL	Florida	US-FL	Florida	0347
GA	Georgia	US-GA	Georgia	0347
GU	Guam	US-GU	Guam (see also separate entry under GU)	0347
HI	Hawaii	US-HI	Hawaii	0347
IA	Iowa	US-IA	Iowa	0347
ID	Idaho	US-ID	Idaho	0347
IL	Illinois	US-IL	Illinois	0347
IN	Indiana	US-IN	Indiana	0347
KS	Kansas	US-KS	Kansas	0347
KY	Kentucky	US-KY	Kentucky	0347

1-20 of 57 records. Number of records per page: 20

The structure of this table can be configured in the Administration Console if required. For more information, see [Using the Administration Console to Configure Properties for Code Sets and Database Objects](#) on page 63.

The code set table provides the following functionality:

1. Sorting by columns.
2. Filtering by multiple queries.
3. Pagination.
4. Drop-down list for the record quantity.

## Sorting

You can sort the code set table by column by clicking on the column header or sorting icon.

The option to sort by columns can be configured in the Administration Console if required. For more information, see [Using the Administration Console to Configure Properties for Code Sets and Database Objects](#) on page 63.

## Filtering

Inline filters can be used to quickly find a specific value. When a value is entered into the filter field at the top of each column, only rows that match this filtering criteria are displayed.

Filtering can also be applied by multiple queries. To discard filtered results, delete any filter terms in the filter field.

The option to filter can be configured in the Administration Console if required. For more information, see [Using the Administration Console to Configure Properties for Code Sets and Database Objects](#) on page 63.

## Pagination

You can navigate through any pages of information that are returned by clicking on a specific page number, or clicking on the appropriate arrow. A single arrow moves to the next page (one page at a time). A double arrow takes you to the first or last page (depending on the direction selected). You can also select a number of records to display in the table by default by selecting a number from the drop-down list. The data will reload automatically.

## Database Objects Viewer

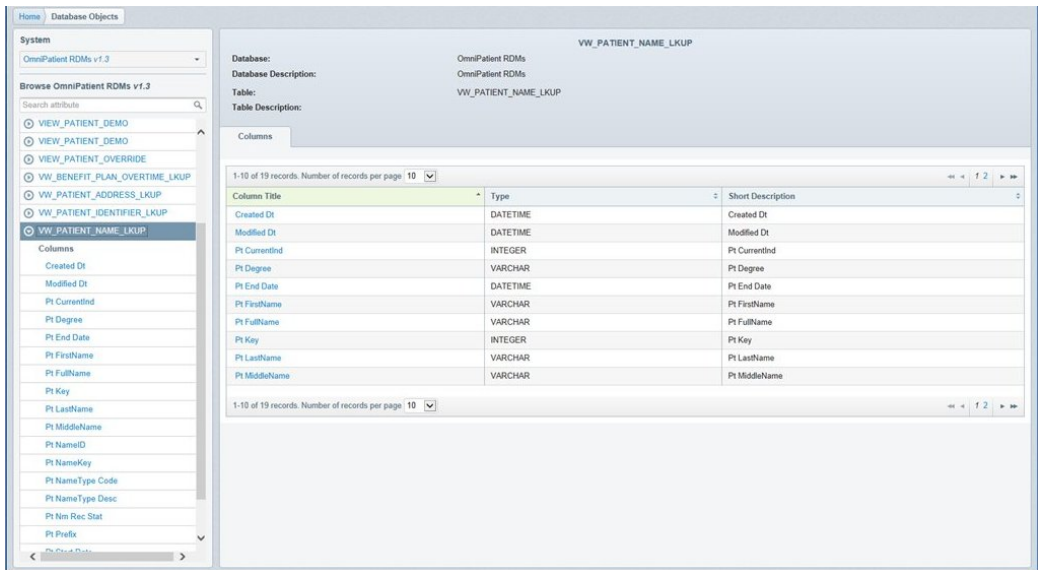
### In this section:

Navigation Pane

Searching Database Objects

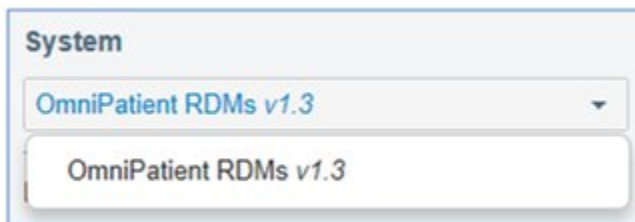
Details Panel

The Database Objects Viewer shows the Table and Column details of the databases from which the data is imported into Omni-Payer, as shown in the following image.

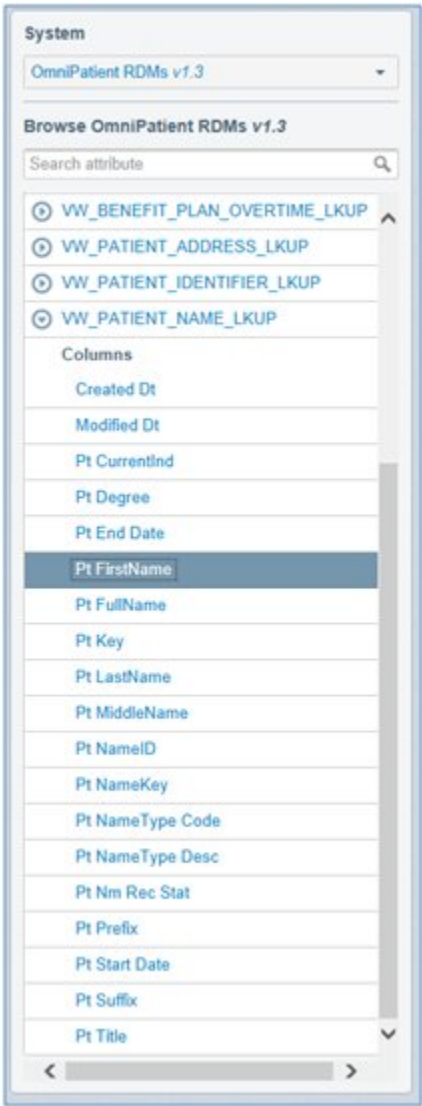


### Navigation Pane

You can select the database systems with versions that are available for browsing from the drop-down list, as shown in the following image.



Once a system is selected from the drop-down list, the Navigation panel is populated with a tree of corresponding database objects (tables and columns), as shown in the following image.



## Searching Database Objects

The Navigation panel contains a search field, which provide functionality to search through a tree of corresponding database objects (tables and columns). To search through a list of database objects, enter your search terms in the field and click the search icon to the right of the field or press Enter.

The search is performed only for the source system that is currently selected. The behavior of the search is not case-sensitive and finds all tables and columns that match the search criteria, even partially.

If the node name of a child matches the query but not the parent, then all parent nodes are displayed and expanded.

The Details panel does not change until you select any of the search results or cancel the search.

To cancel a search, delete any search terms in the search field and click the search icon to the right of the field or press Enter.

## Details Panel

You can select any node from the left pane and navigate the hierarchy as required. When you click on a table name header, the table node is expanded and the list of columns is displayed. At the same time, the Details panel is populated with the information about the selected object.

To view a column property, click a Column Title link in the Details panel or click a column in the navigation tree.

The screenshot displays the Omni-Payer Data Dictionary interface. On the left is a navigation tree with a search bar and a list of database objects. The main panel is titled 'BENEFIT\_PLAN\_LKUP'. At the top of this panel, there are three sections: 'Database: OmniPatient RDMs', 'Database Description: OmniPatient RDMs', and 'Table: BENEFIT\_PLAN\_LKUP'. Below these is a 'Table Description:' section. The main part of the panel is a table of columns. The table has three columns: 'Column Title', 'Type', and 'Short Description'. The table lists 14 columns, including 'AdjGrpSecClaims', 'AdjGrpSecClaims Desc', 'AdjGrpSecClaims Code', 'AdjGrpSecClaims Desc Code', 'AdjGrpSecClaims Code Desc', 'AdjGrpSecClaims Code Desc Code', 'AdjGrpSecClaims Code Desc Code Desc', 'AdjGrpSecClaims Code Desc Code Desc Code', 'AdjGrpSecClaims Code Desc Code Desc Code Desc', 'AdjGrpSecClaims Code Desc Code Desc Code Desc Code', 'AdjGrpSecClaims Code Desc Code Desc Code Desc Code Desc', 'AdjGrpSecClaims Code Desc Code Desc Code Desc Code Desc Code', 'AdjGrpSecClaims Code Desc Code Desc Code Desc Code Desc Code Desc', and 'AdjGrpSecClaims Code Desc Code Desc Code Desc Code Desc Code Desc Code'. The table is paginated, showing 1-10 of 194 records.

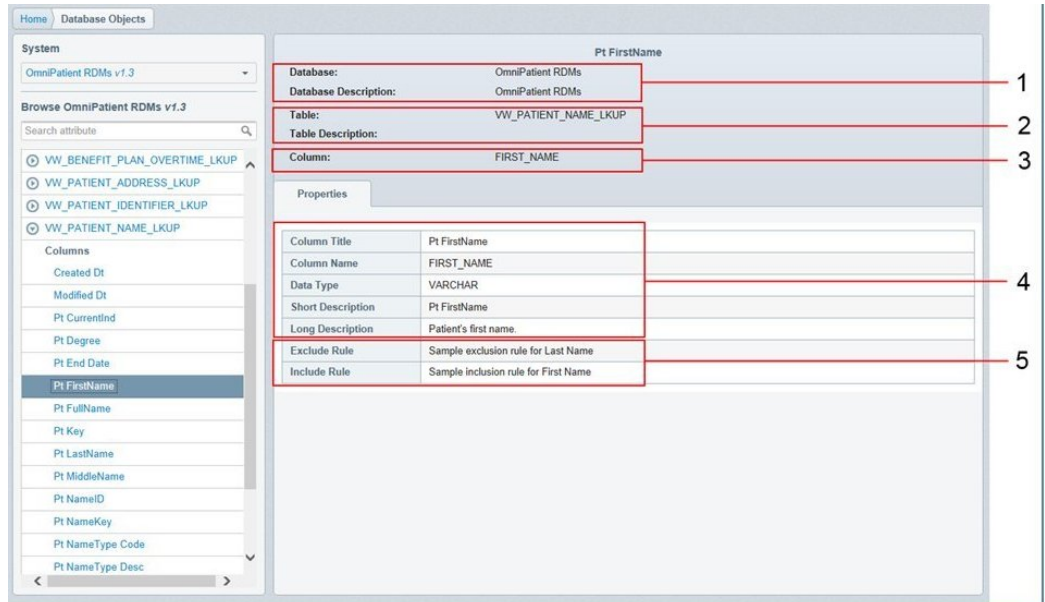
Column Title	Type	Short Description
AdjGrpSecClaims	VARCHAR	AdjGrpSecClaims
AdjGrpSecClaims Desc	VARCHAR	AdjGrpSecClaims Desc
AdjGrpSecClaims Code	VARCHAR	AdjGrpSecClaims Code
AdjGrpSecClaims Desc Code	VARCHAR	AdjGrpSecClaims Desc Code
AdjGrpSecClaims Code Desc	PACKED	AdjGrpSecClaims Code Desc
AdjGrpSecClaims Code Desc Code	VARCHAR	AdjGrpSecClaims Code Desc Code
AdjGrpSecClaims Code Desc Code Desc	VARCHAR	AdjGrpSecClaims Code Desc Code Desc
AdjGrpSecClaims Code Desc Code Desc Code	VARCHAR	AdjGrpSecClaims Code Desc Code Desc Code
AdjGrpSecClaims Code Desc Code Desc Code Desc	VARCHAR	AdjGrpSecClaims Code Desc Code Desc Code Desc
AdjGrpSecClaims Code Desc Code Desc Code Desc Code	VARCHAR	AdjGrpSecClaims Code Desc Code Desc Code Desc Code
AdjGrpSecClaims Code Desc Code Desc Code Desc Code Desc	VARCHAR	AdjGrpSecClaims Code Desc Code Desc Code Desc Code Desc
AdjGrpSecClaims Code Desc Code Desc Code Desc Code Desc Code	VARCHAR	AdjGrpSecClaims Code Desc Code Desc Code Desc Code Desc Code
AdjGrpSecClaims Code Desc Code Desc Code Desc Code Desc Code Desc	VARCHAR	AdjGrpSecClaims Code Desc Code Desc Code Desc Code Desc Code Desc
AdjGrpSecClaims Code Desc Code Desc Code Desc Code Desc Code Desc Code	VARCHAR	AdjGrpSecClaims Code Desc Code Desc Code Desc Code Desc Code Desc Code

Information that can be displayed in the Details panel is metadata driven and can be configured in the Administration Console if required. For more information, see [Using the Administration Console to Configure Properties for Code Sets and Database Objects](#) on page 63.

The Details panel for a selected table contains:

1. Database quick details.
2. Table quick details.
3. Table of columns that belong to that table, which includes descriptive information.

The following image shows the structure of the Details panel that is displayed when a database object is selected.



The Details panel contains the following information:

1. Database quick details.
2. Table quick details.
3. Column quick details.
4. Column full information.
5. Include and Exclude rules if they exist.

## Using the Administration Console to Configure Properties for Code Sets and Database Objects

### In this section:

Configuring Properties for Code Sets

Configuring Properties for Database Objects

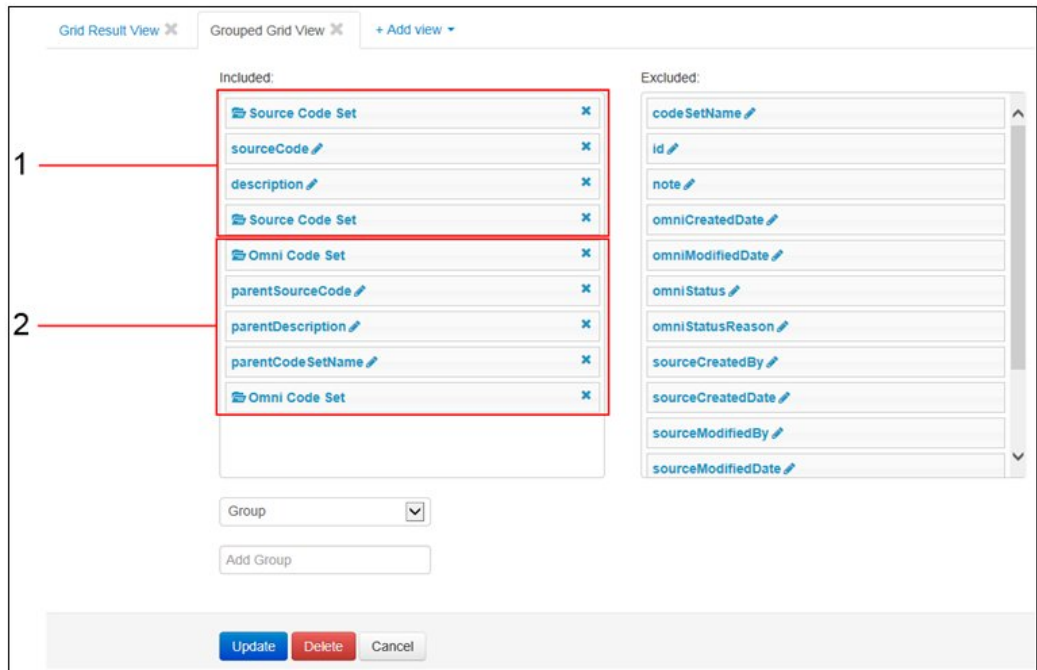
This section describes how you can use the Administration Console to configure properties for code sets and database objects.

**Note:** The Administration Console is available only for users with system administrator roles.

## Configuring Properties for Code Sets

To configure properties for code sets, navigate to the Administration Console by clicking *Administration* in the Omni-Payer Management Central (OPMC) navigation menu. Edit the Source Codes table that is displayed in the Table List grid on the Tables tab.

To configure the Source Code Set and Omni Code Set sections, select the Source Codes table and then edit the Grouped Grid View section, as shown in the following image.



The Grouped Grid View section contains the following groups:

1. Source Code Set columns
2. Omni Code Set columns



To change the column display name, whether sorting and filtering can occur, click the pencil icon for a specific column and update the corresponding options, as shown in the following image.

The screenshot shows the 'Edit Column' form in the Omni-Payer Data Dictionary. The form is for editing a column named 'sourceCode'. The 'Title' field is set to 'Code' and is highlighted with a red box and a red line pointing to the number 1. The 'Can Sort' and 'Can Filter' toggle switches are both set to 'ON' and are highlighted with red boxes and red lines pointing to the numbers 2 and 3 respectively. Other fields include 'Description', 'Table \*' (Source Codes), 'Type' (String), 'View' (groupedGridView), 'Treat As' (text), 'Pattern', 'Width', 'Alignment' (left), 'Can Edit' (ON), and 'Is Visible' (ON). At the bottom are 'Update', 'Delete', and 'Reset' buttons.

The column main properties that are visible in the Code Set table include:

- 1.** Title, which is responsible for the column title in headers.
- 2.** Sorting functionality for that column.
- 3.** Filtering functionality for that column.

## Configuring Properties for Database Objects

**In this section:**

- Table Properties
- Column Properties

To configure properties for database objects, navigate to the Administration Console by clicking *Administration* in the Omni-Payer Management Central (OPMC) navigation menu. Edit the database table that is displayed in the Table List grid on the Tables tab. A list of included columns are displayed in the Quick Details View for the database.

### Table Properties

To configure properties for selected tables that are displayed in the Details panel, navigate to the Administration Console by clicking *Administration* in the Omni-Payer Management Central (OPMC) navigation menu. Edit the table that is displayed in Table List grid on the Tables tab. A list of included columns are displayed in the Quick Details View for the table.

Grid Result View ✕

Quick Details View ✕

Full Info View ✕

+ Add view ▾

Included:

name ✎ ✕

shortDescr ✎ ✕

Excluded:

decommissionDate ✎

id ✎

implementationDate ✎

longDescr ✎

systemVersion ✎

Group ▾

Add Group

Update

Delete

Cancel

Columns that are displayed in the grid for database tables can be configured in the columns table within the Grid Result View section. In addition, configuration of nested columns (display name, sorting, and filtering functionality) is available.

The screenshot displays the 'Grid Result View' configuration window. At the top, there is a horizontal menu with several tabs: 'Grid Result View' (active), 'Quick Details View', 'Full Info View', 'Record Properties View', 'Advanced Search View', 'Frequent Search View', 'Related Instances View', 'Breadcrumb View', 'Cases Popup View', 'Case Properties View', 'Manual Override Popup View', and 'Grouped Grid View'. Below the menu is a '+ Add view' button. The main area is divided into two sections: 'Included:' and 'Excluded:'. The 'Included:' section contains a list of columns with edit icons: 'id', 'implementationDate', 'longDescr', 'name', 'shortDescr', 'systemVersion', and 'decommissionDate'. The 'Excluded:' section is currently empty. At the bottom, there are three buttons: 'Update' (blue), 'Delete' (red), and 'Cancel' (grey).

## Column Properties

To configure properties for selected columns that are displayed in the Details panel, navigate to the Administration Console by clicking *Administration* in the Omni-Payer Management Central (OPMC) navigation menu. Edit the Columns table that is displayed in the Table List grid on the Tables tab. A list of columns that are currently included is displayed in the Quick Details View section.

Column properties can be configured from the Columns table in the Full Info View section.

Include and Exclude Rule columns can be configured from the Include Rules and Exclude Rules tables, in the Full Info View section. If required, the title can be changed by configuring the title of a column that is placed in that view.



# A Using the Admin Console

This appendix describes how to use the Admin Console to configure administrative properties and functions that are reflected in Omni-Payer 360 Viewer.

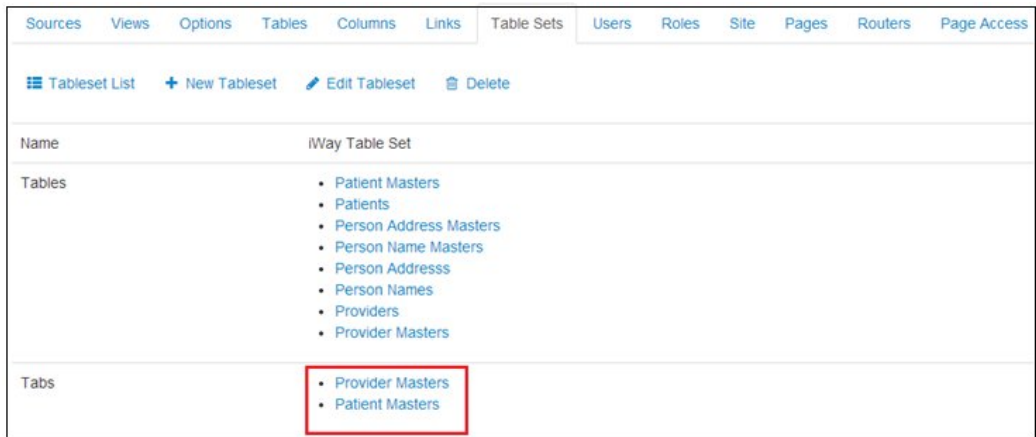
**Note:** As the display changes that are made using the Admin Console are implemented on a system-wide basis (not on a individual user basis), the use of the Admin Console, as documented in this appendix, is limited to users with the *System Administrator* role assigned in the WS02 Identity Server.

## Topics:

- ❑ Configuring Domains
- ❑ Configuring Table Columns Displayed in Pages
- ❑ Configuring Table Columns for Record Details
- ❑ Configuring Subdomain Links for the Advanced Search Page
- ❑ Configuring Frequently Searched Fields for the Advanced Search Page
- ❑ Configuring Search Fields (Except Frequently Searched) and Attributes for the Advanced Search Page
- ❑ Configuring Subdomain Links for the Details 360 and Master Comparison Pages
- ❑ Configuring Domain and Subdomain Section Attributes (Details 360, Master Comparison, and Compare Source Pages)
- ❑ Configuring Record Properties Section Attributes
- ❑ Configuring Column Dimensions and Identifying Columns to be Sorted and Filtered

## Configuring Domains

To configure domains, click the Table Sets tab, as shown in the following image.



## Configuring Table Columns Displayed in Pages

To configure table columns that are displayed in Omni-Payer 360 Viewer pages (for example, the Home page and Search Result page), edit the Master table and include or exclude the required columns in the GridResultView tab, as shown in the following image.

The screenshot shows the 'Edit Table' interface in the Admin Console. The 'Columns' tab is selected, and the 'GridResultView' sub-tab is active. The table being edited is 'PatientMaster' from the 'OmniSource' source. The 'Name' field is 'Patient Masters' and the 'tableRecordName' is 'Record'.

The 'Included' list contains the following columns:

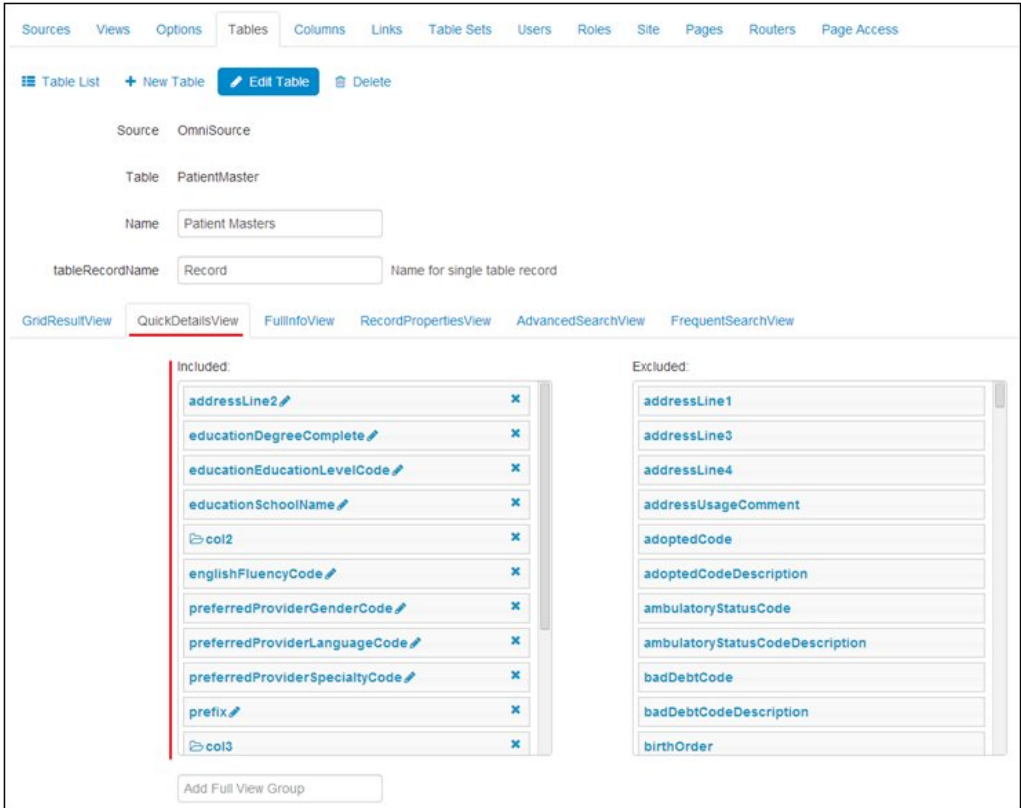
- id
- motherMaidenName
- omniCreatedDate

The 'Excluded' list contains the following columns:

- addressLine1
- addressLine2
- addressLine3
- addressLine4
- addressUsageComment
- adoptedCode
- adoptedCodeDescription
- ambulatoryStatusCode
- ambulatoryStatusCodeDescription
- badDebtCode
- badDebtCodeDescription

## Configuring Table Columns for Record Details

To configure table columns that are displayed in Omni-Payer 360 Viewer pages for record details, edit the table and include or exclude the required columns in the QuickDetailsView tab, as shown in the following image.





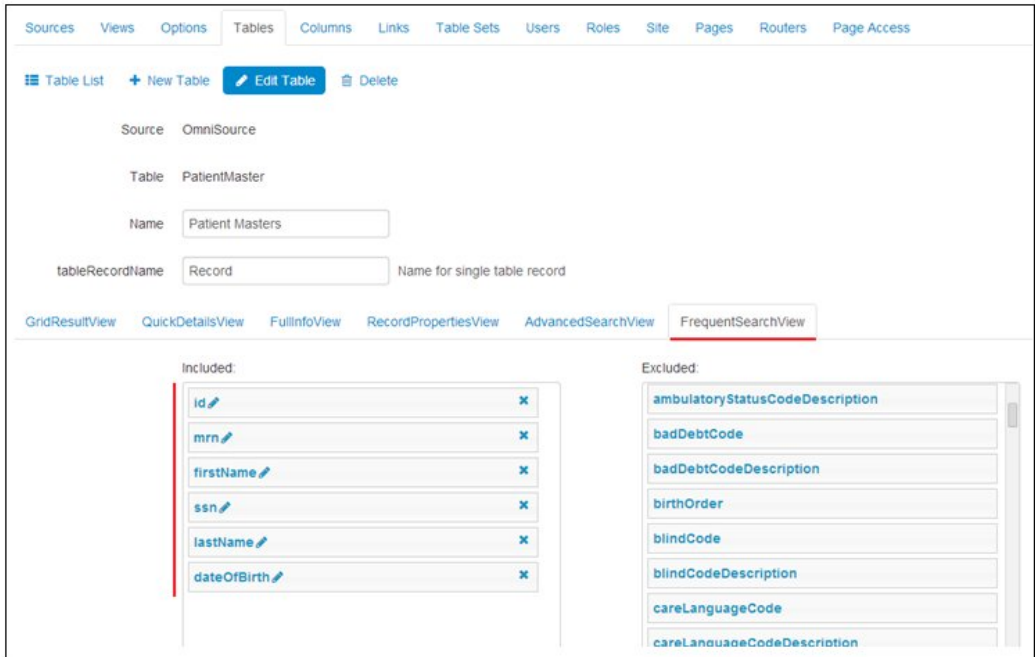
## Configuring Subdomain Links for the Advanced Search Page

To configure subdomain links that are displayed in Omni-Payer 360 Viewer for the Advanced Search page, edit the table and include or exclude the required links in the AdvancedSearchView tab for the corresponding table, as shown in the following image.

The screenshot displays the Admin Console interface for configuring subdomain links. The top navigation bar includes tabs for Sources, Views, Options, Tables, Columns, Links, Table Sets, Users, Roles, Site, Pages, Routers, and Page Access. The 'Tables' tab is active, showing a 'Table List' with buttons for '+ New Table', 'Edit Table', and 'Delete'. The 'PatientMaster' table is selected, with 'OmniSource' as the source and 'Patient Masters' as the name. The 'tableRecordName' is set to 'Record'. Below this, there are tabs for GridResultView, QuickDetailsView, FullInfoView, RecordPropertiesView, AdvancedSearchView (which is selected and underlined), and FrequentSearchView. The 'AdvancedSearchView' tab shows two sections: 'Included:' and 'Excluded:'. The 'Included:' section contains a list of links: 'addresses' and 'names', each with a blue pencil icon and a red 'x' icon. The 'Excluded:' section contains a list of links: 'contactMethods', 'identifiers', 'instances', and 'preferredProviders', each with a blue pencil icon.

# Configuring Frequently Searched Fields for the Advanced Search Page

To configure frequently searched fields displayed in Omni-Payer 360 Viewer for the Advanced Search page, edit the table and include or exclude the required fields in the FrequentSearchView tab for the corresponding table, as shown in the following image.



## Configuring Search Fields (Except Frequently Searched) and Attributes for the Advanced Search Page

To configure search fields and their corresponding attributes that are displayed in Omni-Payer 360 Viewer for the Advanced Search page (except frequently searched), edit the table and include or exclude the required fields in the AdvancedSearchView tab, as shown in the following image.

The screenshot shows the Admin Console interface for configuring search fields. The 'Tables' tab is active, displaying the 'PatientMaster' table with the name 'Patient Masters' and 'Record' as the table record name. The 'AdvancedSearchView' tab is selected, showing a list of included and excluded search fields.

**Included:**

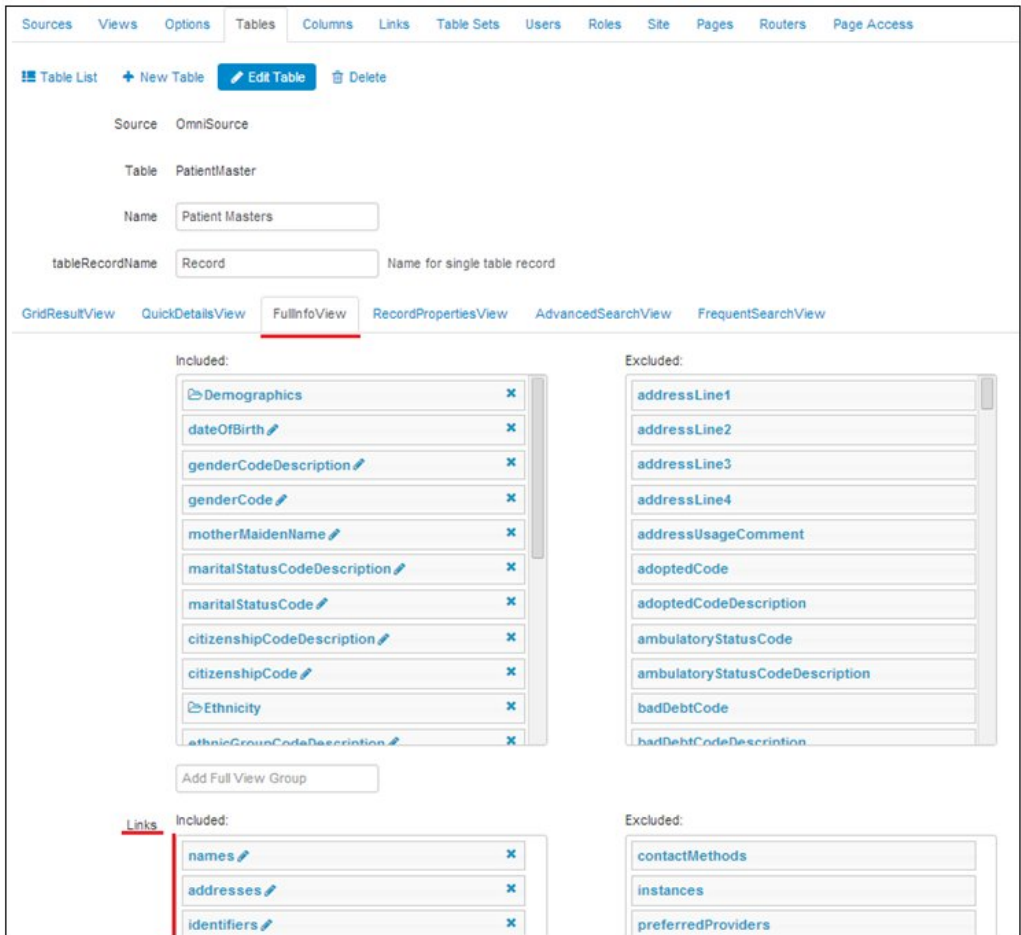
- dateOfDeath
- deafCode
- deceasedCode
- degree
- disabilityCode
- Group1
- diseaseAlertCode
- drugAllergiesCode
- educationDegreeComplete
- educationEducationLevelCode

**Excluded:**

- habitIllicitDrugUseCodeDescription
- habitPipeUseCodeDescription
- habitSnuffUseCodeDescription
- habitTobaccoUseCodeDescription
- handicapCodeDescription
- hearingImpairedCodeDescription
- identityUnknownCodeDescription
- interpreterRequiredCodeDescription
- languageCodeDescription
- livingArrangementCodeDescription
- livingDependencyCodeDescription

## Configuring Subdomain Links for the Details 360 and Master Comparison Pages

To configure subdomain links that are displayed in Omni-Payer 360 Viewer for the Details 360 page and Master Comparison page, edit the master table and include or exclude the required links in the FullInfoView tab, as shown in the following image.



## Configuring Domain and Subdomain Section Attributes (Details 360, Master Comparison, and Compare Source Pages)

To configure attributes that are displayed in Omni-Payer 360 Viewer for the Domain and Subdomain sections (Details 360, Master Comparison, and Compare Source pages), include or exclude the required columns in the FullInfoView tab, as shown in the following image.

The screenshot shows the Admin Console configuration page for the **PatientMasters** table. The **FullInfoView** tab is selected, displaying a list of attributes to be included or excluded from the view.

**Table Configuration:**

- Source: OmniSource
- Table: PatientMaster
- Name: Patient Masters
- tableRecordName: Record

**Attributes Configuration:**

**Included:**

- Demographics
- dateOfBirth
- genderCodeDescription
- genderCode
- motherMaidenName
- maritalStatusCodeDescription
- maritalStatusCode
- citizenshipCodeDescription
- citizenshipCode
- Ethnicity
- ethnicGroupCodeDescription

**Excluded:**

- addressLine1
- addressLine2
- addressLine3
- addressLine4
- addressUsageComment
- adoptedCode
- adoptedCodeDescription
- ambulatoryStatusCode
- ambulatoryStatusCodeDescription
- badDebtCode
- badDebtCodeDescription

At the bottom, there is a button labeled "Add Full View Group".

## Configuring Record Properties Section Attributes

To configure attributes that are displayed in Omni-Payer 360 Viewer for the Record Properties section, include or exclude the required columns in the RecordPropertiesView tab, as shown in the following image.

SourcesViewsOptionsTablesColumnsLinksTable SetsUsersRolesSitePagesRoutersPage Access

Table ListNew TableEdit TableDelete

Source: OmniSource

Table: PatientMaster

Name: Patient Masters

tableRecordName: RecordName for single table record

GridResultViewQuickDetailsViewFullInfoViewRecordPropertiesViewAdvancedSearchViewFrequentSearchView

Included:

masterId✕

omniModifiedDate✕

Excluded:

addressLine1

addressLine2

addressLine3

addressLine4

addressUsageComment

adoptedCode

adoptedCodeDescription

ambulatoryStatusCode

ambulatoryStatusCodeDescription

badDebtCode

badDebtCodeDescription

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iWay Software

## Configuring Column Dimensions and Identifying Columns to be Sorted and Filtered

To configure the column size, alignment of columns, and specify what columns can be sorted and filtered in Omni-Payer 360 Viewer, click the corresponding pencil icon for the column in the GridResultView tab, as shown in the following image.

The screenshot shows the Admin Console interface for configuring the 'PatientMaster' table. The 'GridResultView' tab is selected, showing a list of columns that are included or excluded from the grid. The 'Included' list contains three columns: 'id', 'motherMaidenName', and 'omniCreatedDate'. Each of these columns has a red box highlighting a pencil icon, indicating that they can be edited for sorting and filtering. The 'Excluded' list contains several address-related columns: 'addressLine1', 'addressLine2', 'addressLine3', 'addressLine4', 'addressUsageComment', and 'adontedCode'.

Source	Table	Name	tableRecordName
OmniSource	PatientMaster	Patient Masters	Record

GridResultView | QuickDetailsView | FullInfoView | RecordPropertiesView | AdvancedSearchView | FrequentSearchView

Included:

- id
- motherMaidenName
- omniCreatedDate

Excluded:

- addressLine1
- addressLine2
- addressLine3
- addressLine4
- addressUsageComment
- adontedCode





## **Reader Comments**

In an ongoing effort to produce effective documentation, the Technical Content Management staff at Information Builders welcomes any opinion you can offer regarding this manual.

Please share your suggestions for improving this publication and alert us to corrections. Identify specific pages where applicable. You can contact us through the following methods:

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