



Accessing COMPASS from Your Home or Office

IMPORTANT: Please Read!

1. We encourage you to have your **office manager** or **IT professional** establish access for you using these instructions.
2. You can establish access using these instructions. Establishing access takes about 10-15 minutes and, while not difficult, **must** be performed in the correct sequence.
3. If you need **technical** assistance, call the Seton ServiceDesk at (512) 324-1675. When prompted, select option #5 (COMPASS). Tell the operator you are a **physician** needing help establishing COMPASS access. The Seton ServiceDesk is available 24 hours a day, seven days a week.
4. If you need **assistance learning to use COMPASS**, a 30-minute lesson is available online at Seton Learning Central (course code COMP-150EV).

Before Establishing COMPASS Access

1. Check that your computer meets **all minimum technical requirements** for running COMPASS. You will **not** be able to access COMPASS from any computer not meeting these requirements. The requirements are—
 - a. Windows 2000 operating system or later
 - b. Internet Explorer 5.0 or later
 - c. broadband Internet connection
2. Get your **Seton Network** and **COMPASS** logons. For an explanation of the differences between a Seton Network account and a COMPASS account or for instructions on how to request an account or password, see **Appendix: Requesting Accounts and Changing Passwords** on page 10.

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For electronic versions of these documents,
please visit the COMPASS Help section of DoctorLink,
Seton's new Internet physician portal.

DoctorLink can be found at <http://doctors.seton.org>.

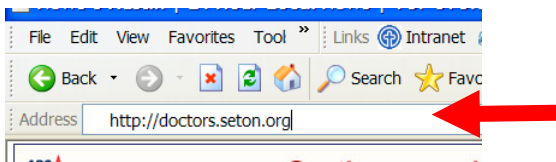
Step 1: Accessing COMPASS for the first time

Physicians can now access COMPASS from anywhere - even home - through a secure, Internet-based portal. To safeguard patient health information, it is recommended DoctorLink not be accessed from public computers outside of your control, such as airport kiosks, internet cafés, hotel business centers, libraries, etc.

Step 1A. Installing the Citrix Client

To connect to COMPASS, you must first download and install the **Citrix ICA Web** software. This only has to be installed once and should only take one to two minutes. If you have previously installed the Citrix software, proceed directly to **Step 1B. Accessing COMPASS** on page five.

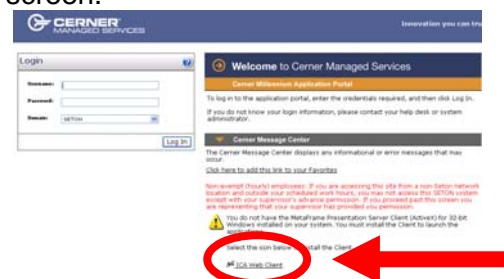
1. Connect to the Internet. In the address line of the web browser, type <http://doctors.seton.org>.



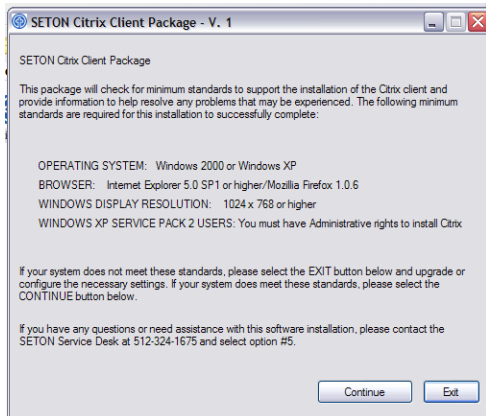
2. DoctorLink will appear. Please click on the **COMPASS** graphic or the word **Login** to the right of the screen.



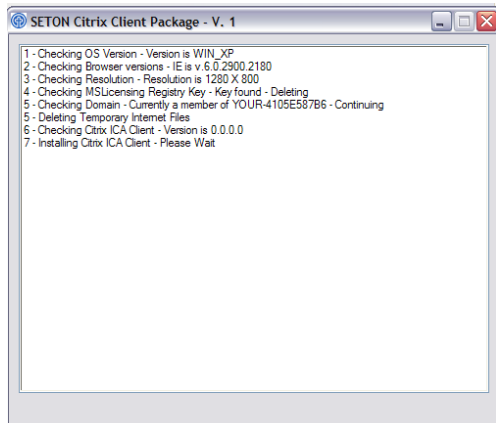
3. To install the software, click on the **ICA Web Client** link in the lower right-hand corner of the screen.



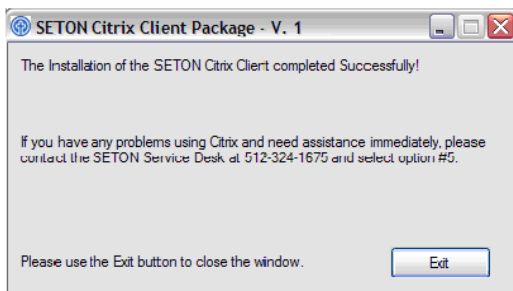
4. If your system meets the minimum standards listed, select **Continue**. If your system does not meet these minimum standards, you cannot download the necessary software. Select **Exit** to stop the download. You (or your IT professional) will need to configure your system correctly and then continue the ICA Web Client installation.



5. The actions automatically performed by the ICA Web Client will appear. The Web Client will automatically.

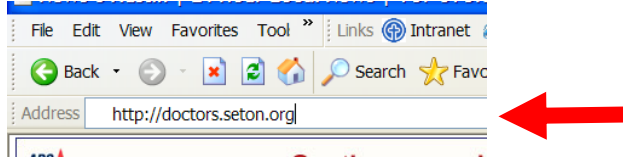


6. After the installation is complete, select **Exit**.



Step 1B. Accessing COMPASS

1. Connect to the Internet. In the address line of the web browser, type <http://doctors.seton.org>.



2. DoctorLink will appear. Click the **COMPASS** graphic or the word **Login** at the right of the screen.

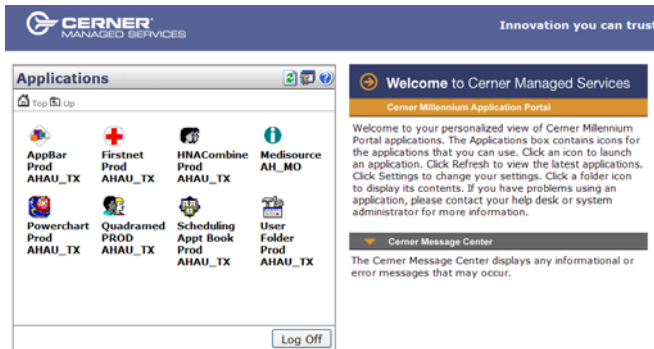


3. Logon with your Seton Network user ID and password. For an explanation of the differences between a Seton Network account and a COMPASS account or for instructions on how to request an account or password, see **Appendix: Requesting Accounts and Changing Passwords** on page 10.

NOTE: If this is your first time logging in with your Seton Network Account, you will be prompted to change your password. Go to page 11 of this document for instructions. After changing, continue with step four on the next page.

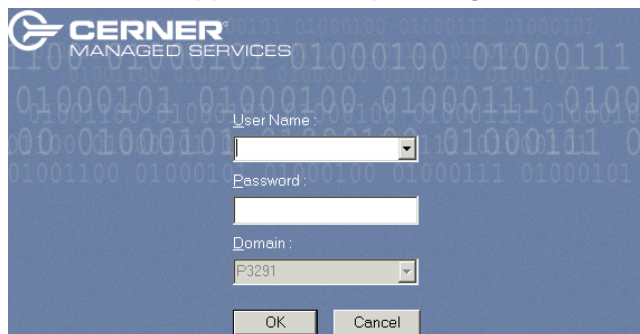


- The COMPASS Application page will appear. Click the corresponding icon to launch your desired application. The majority of physicians will use PowerChart. Emergency physicians will most often use FirstNet.

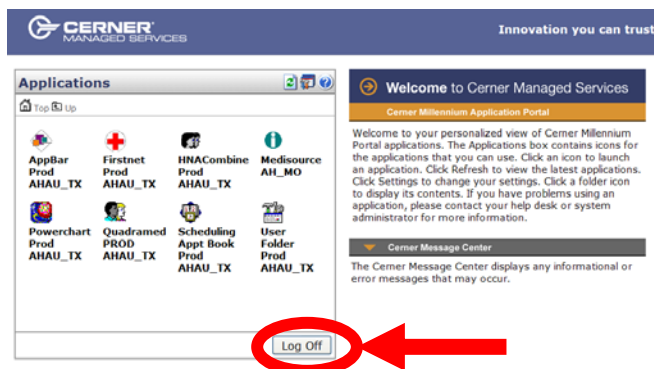


- Wait for the connection to complete.
- Enter your COMPASS user name and password. Press **Enter** or click **OK**.

NOTE: This is different from the Seton Network Account information used in step three. For information on the differences between your Seton Network Account and your COMPASS account, see **Appendix: Requesting Accounts and Changing Passwords** on page 10.





- When finished using COMPASS, please exit all applications. The COMPASS Application page will appear. Click the **Log Off** button.



Now continue to **Create a Visit Relationship List** found on page seven.

Step 2: Create a Visit Relationship List



The Visit Relationship list will create a list of all patients in the hospital with whom you have a relationship. This list will automatically update each time you log on to COMPASS.

1. From the Patient List tab, click the **List Maintenance** button. The Modify Patient List box displays. 
2. Click **New**. The Patient List Type box displays.
3. Click **Visit Relationship**.
4. Click **Next**. The Visit Relation Patient List box displays.
5. Place a check mark in the boxes beside the following:
 - Physician-admitting
 - Physician-attending
 - Physician-consulting
 - Physician-coordinator of care
 - Physician-cross covering
6. Highlight everything in the **Name** box. Type "My Patient List" in the box.
7. Click **Next**. The filter status and type box displays.
8. Select **Not Discharged** from the select a status box (left side).
9. Click **Next**. The Proxy box displays.
10. Click **Next**. The Filter Facility box displays.
11. Click desired facilities to select.
12. Click **Finish**.
13. In the Modify Patient List box (left side) highlight "My Patient List" and click the **blue arrow** in the center of the Modify Patient List box to move your list to the active column (right side). 
14. Click **OK**. The My Patient List tab will appear.

Now continue to *Create a Provider Group List* found on page eight.

Step 3: Create a Provider Group List

The Provider Group List will create a list of all patients in the hospital being treating by any member of your medical office. This list will automatically update each time you log on to COMPASS.

1. From the Patient List tab, click the **List Maintenance** button. The Modify Patient List box displays. 
2. Click **New**. The Patient List Type box displays.
3. Click **Provider Group**.
4. Click **Next**. The Provider Group Patient List box displays.
5. Select your Provider Group. NOTE: If your Provider Group does not display, call the SETON Service Desk: (512) 324-41675 Option #5 for assistance.
6. Click **Finish**.
7. In the Modify Patient List Type box highlight "My Patient List" and click the **blue arrow** in the center of the Modify Patient List Type box to move your list to the active column. 
8. Click **OK**. The My Patient List tab will appear.

Now continue to *Create Custom List* found on page nine.

Step 3: Create a Custom List for Tracking Patients

Unlike a provider group list or a visit relationship list, which are based on admission records, a **custom list** is built and maintained by the user – allowing for the highest level of personalization.

To Create a Custom List:

1. From the Patient List tab, click the **List Maintenance** button on the horizontal toolbar at the top of your screen.
2. Click **New**. The Patient List box displays.
3. Click **Custom**.
4. Click **Next**.
5. Name the custom list, click **Finish**.
6. Select the list in the Available lists window, and click the Add arrow to move the list to the Active list window.
7. Click **OK**.



Once a custom list is created, search for and add patients to your list by:

1. Select the custom patient list so it is open. Click **OK**.
2. Click the **Add Patient** button on the horizontal toolbar at the top of your screen.
3. Search for the patient with the patient's name, MRN, or SSN.
4. Click **Search** or press the ENTER key.
5. Select the patient you wish to add. Click **OK**.



Patients will remain on a custom list until you remove them by:

1. Select the custom patient list so it is open.
2. Select the patient to be removed from list.
3. Click the **Remove Patient** button on the horizontal toolbar at the top of your screen.



To print a custom list from within a Seton facility:

1. Select the tab for your custom list.
2. Click the **Printer** icon in the toolbar.
3. Select a printer from the list.
4. Click **Print**.



To print a custom list from outside a Seton facility:

1. Select the tab for your custom list.
2. From the **Task Menu**, select **Print Screen**.
3. Verify your printer is in the print dialog box
4. Click **Print** (note: you may have to scroll down in your list and repeat this as Print Screen only prints the viewable area of the list).

This completes the instructions for accessing COMPASS for the first time from your home or office.

Appendix: Requesting Accounts and Changing Passwords

Seton Network and COMPASS Accounts Explained

Your **Seton Network Account** was issued when you were credentialed at Seton. This is what you use anytime you log into a computer within a Seton facility to check your email, visit to a website, etc. When accessing COMPASS from your office or home, the Seton Network Account (sometimes called an Active Directory Account) allows you past the Seton security firewall and into the Seton Network to access various applications.

Once inside the Seton firewall, your **COMPASS** account allows you to access COMPASS.

How to get a Seton Network Account or Password

If you do not have a Seton Network Account or cannot remember your Seton Network Account password, contact the Seton ServiceDesk at (512) 324-1675 for assistance.

How to get a COMPASS Account or Password

If you are a Seton credentialed physician and do not have a COMPASS Account, please contact Kathleen Lawson with MedStaff Services at 324-1287. If you are a resident and do not have a COMPASS Account, please contact Mary Matus with AMEP at 324-7864. If you cannot remember your COMPASS password, contact the Seton ServiceDesk at (512) 324-1675.

Seton Family of Hospitals Electronic Password Guidelines

Passwords must be least eight characters in length. Strong passwords are recommended whenever feasible and usually include:

- Upper and lower case characters,
- Numeric digits, and
- Punctuation characters.

Password should not be:

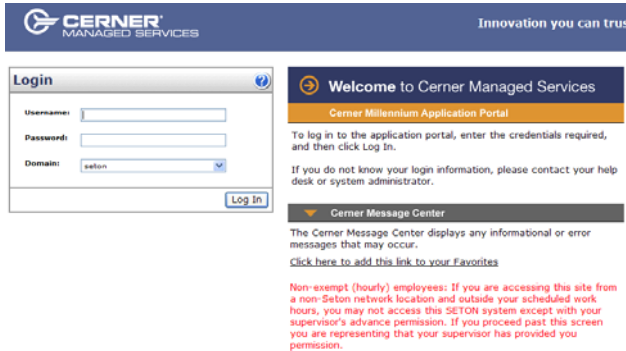
- Based on personal information,
- Easily guessed, or
- Written down.

It is strictly prohibited to share password(s) with any other person. It is also forbidden to use systematic saving/caching features which allow systems to store password information.

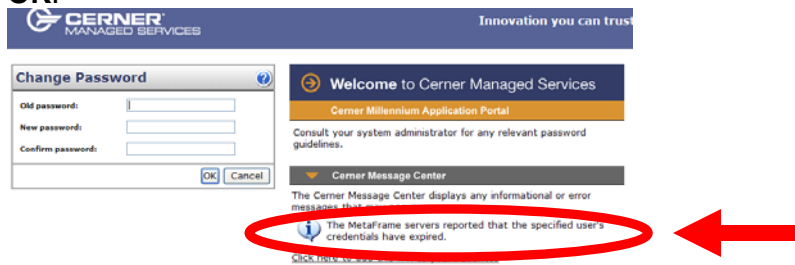
Changing Your Seton Network Password

NOTE: If this is the first time logging on with a Seton Network account, a prompt will appear requiring you to change your password. Follow the instructions below to reset this password when necessary. If you encounter any issues while trying to log on, please contact the Seton Service desk at 324-1675.

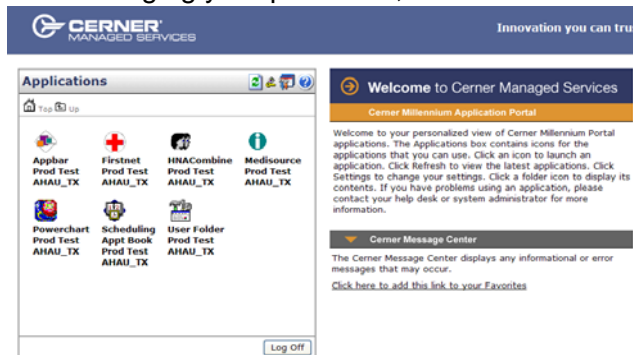
1. Enter your *Seton Network Account* user credentials into the **Username** and **Password** boxes.



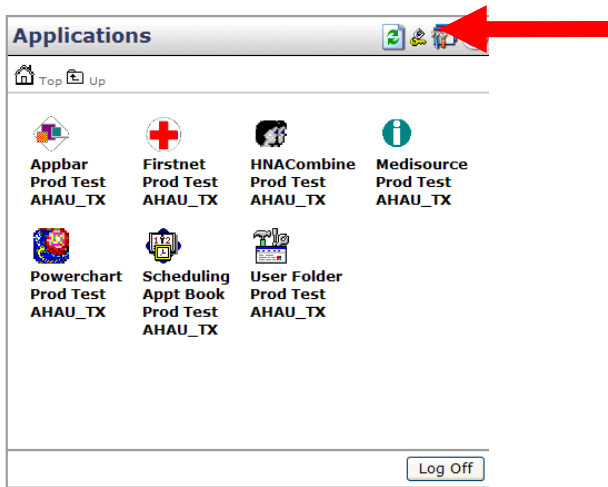
2. A prompt will display indicating the password must be changed as noted in the oval below. If not already filled in, enter the old password. Then enter a new password twice and click **OK**.



3. After changing your password, the COMPASS application set will display.



- If, for any reason you need to change your password before it expires or if you feel the password has been compromised, you can select the key icon at the top of the Application Screen to change the password.



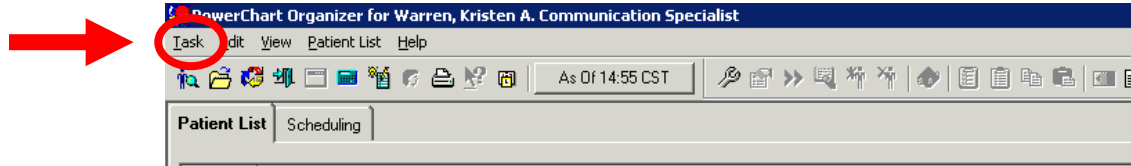
- If not already filled in, type the old password. Then Enter a new password twice and click **OK**.



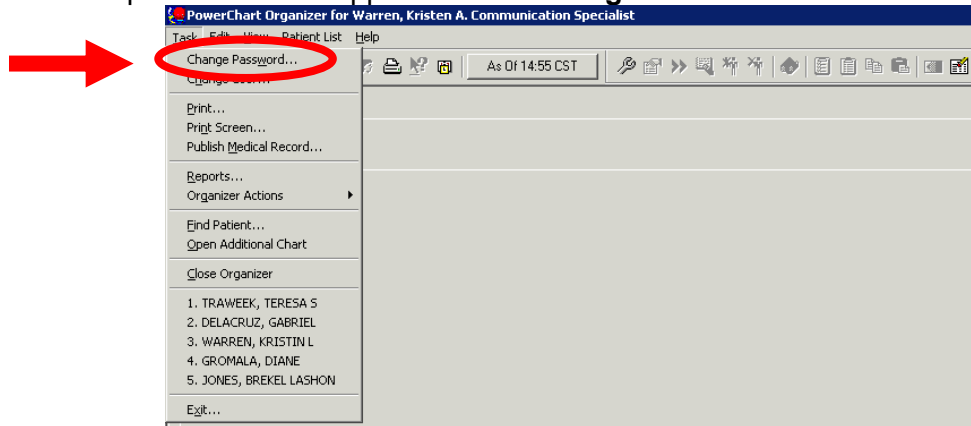
Changing Your COMPASS Password

COMPASS account passwords must change every ninety days. However, you may reset your COMPASS password any time you chose. This is particularly helpful if you like to synchronize your COMPASS password with other system passwords.

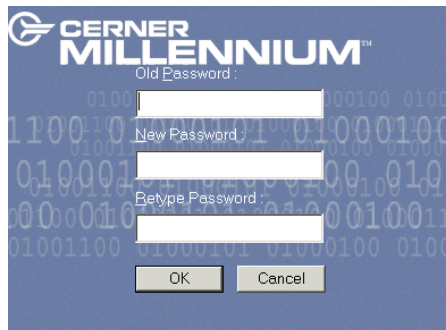
1. With your COMPASS application open, select **Task** from the toolbar at the top of your screen.



2. A drop down box will appear. Select **Change Password**.



3. If not already filled in, enter the old password. Then enter a new password twice and click **OK**.

A screenshot of the Cerner Millennium password change dialog box. The dialog has a blue background with the Cerner Millennium logo at the top. It contains three text input fields labeled "Old Password:", "New Password:", and "Retype Password:". Below the fields are "OK" and "Cancel" buttons. The background of the dialog features a pattern of binary code (0s and 1s).