

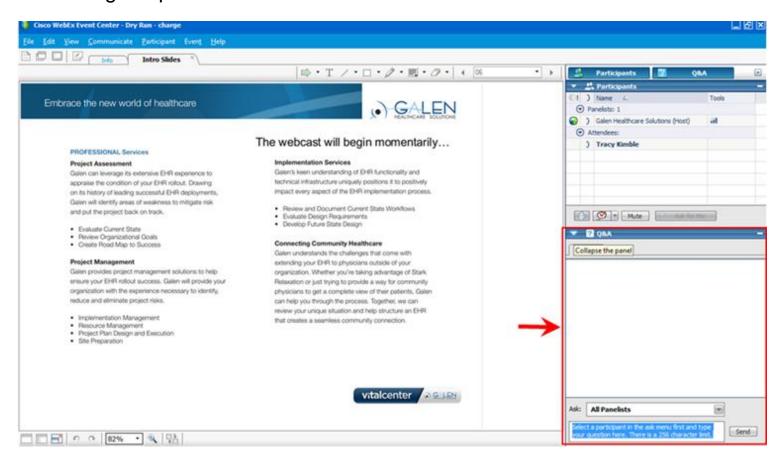
# Custom Cleanup Solutions: Overview and Demonstrations

**Empowering Extraordinary Patient Care** 





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## Introduction

#### **Fallon Hartford**

- Managing Consultant, Technical Services
- M.S. in Health Informatics
- 4+ years working in Healthcare IT
- Experience in conversions, Crystal reporting, ETL, Works database training



## Overview

- What are cleanup solutions?
- Types of solutions and use cases
- Demos
- An opportunity to ask your questions





## What are Cleanup Solutions?

- Series of SQL scripts that are run to mimic workflow to achieve desired results
- Changing data in the Works database to affect how the application displays data



## Types of Solutions Offered

- Order Cleanup
  - Transitions active orders to a completed status
- Task Cleanup
  - Update Active / In Progress tasks to a removed status
- Worklist Cleanup
  - Remove v11 worklist items based on input requirements
- Problem Cleanup
  - Resolves or resolves and suppresses active problems



## Order Cleanup

#### What Does It Do?

- Transitions orders from one status to another status
  - e.g. Active to a completed status

#### How Does It Work?

- Filters based on date, OrderItem parent classification, current order status
- Can add annotation and order status reason (optional)

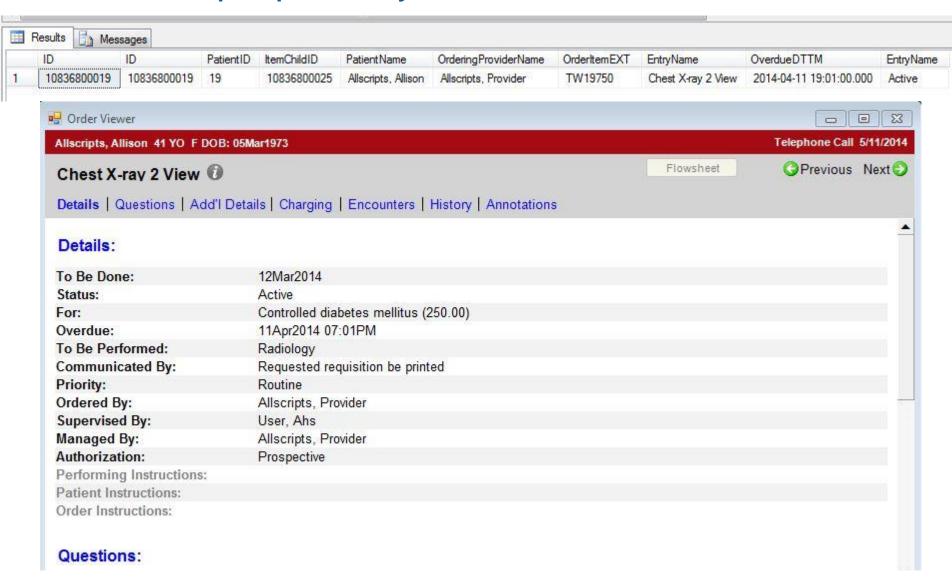
#### Components

- Identification script to review orders
- Stored procedure to take identified orders and put them in desired status





#### **Order Cleanup Step 1: Identify Orders**



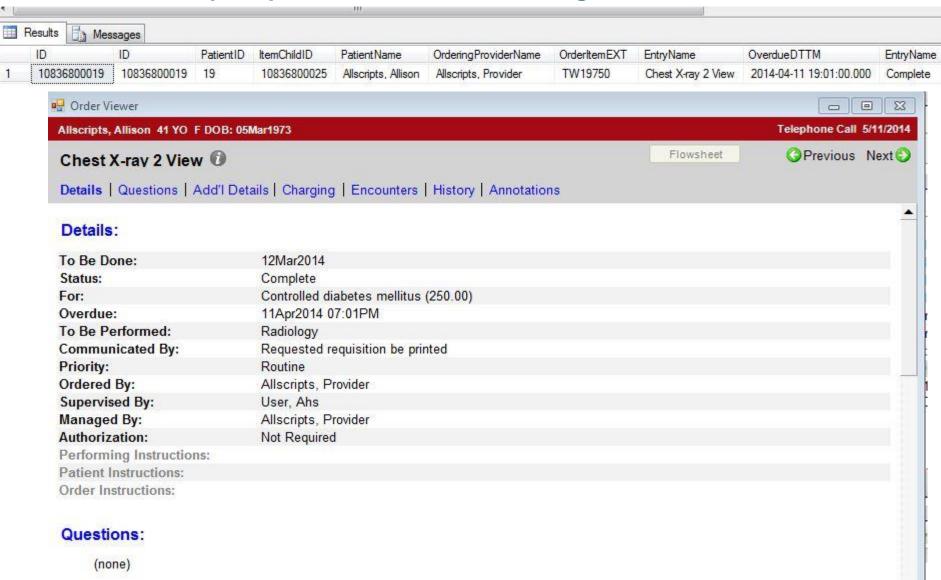


#### **Order Cleanup Step 2: Running Script**

```
10
11
12
   -- EXEC GHS OrderAutoCompleteOverdueBatch 'Active', 'Dx Imaging'
   CREATE PROCEDURE dbo.GHS OrderAutoCompleteOverdueBatch
14
        @OrderStatus VARCHAR(40),
15
        @ClassificationEntryName VARCHAR(40)
16
17
   AS
18
19
        Galen Healthcare Solutions, Inc 2010
20
21
22
        Description: Finds all outstanding orders that have gone 90 days overdue, and completes the
                    We assign an order status reason defined by the client.
23
24
```



#### **Order Cleanup Step 3: Check for Status Change**





## Use Case Example

- Orphaned Orders: Duplicate orders are often placed in the EHR due to order numbers
  not matching through the interface. In this example, we have two patients that have
  had duplicate orders placed on their charts. The tests have already been verified and
  the results are filed on the patients chart, although they still have one active orphan
  order sitting on their current orders list.
- During the migration from Allscripts to EPIC, it is important to consider future orders. This is another great example of when Galen would use the Order cleanup solution to load any future orders in EPIC and then remove them from Allscripts.
- Client has not been tracking overdue imaging orders and working them manually according to process leaving an active order on the chart when in reality the order has been completed.



# Order Cleanup Demo





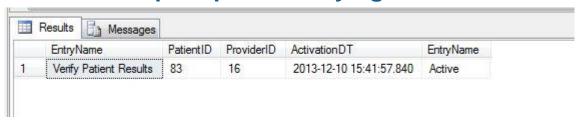
## Task Cleanup

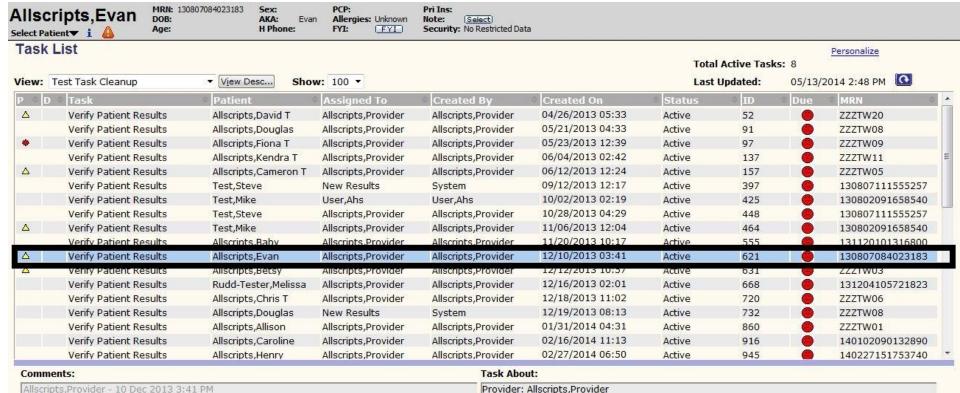
- What Does It Do?
  - Transitions tasks from active status to removed status
  - Removes from the active task list
- How Does It Work?
  - Filters based on date, task type and task owner
  - Can add task text (optional)
- Components
  - Identification script to review tasks
  - Stored procedure to take identified tasks and put them in desired status





#### **Task Cleanup Step 1: Identifying Tasks**





JF-Rapid Strep



#### **Task Cleanup Step 2: Running Script**

```
10
   11
   12 -- EXEC GHS TaskComplete
   13 ALTER PROCEDURE [dbo].[GHS TaskComplete]
   14
      AS
   15
   16
   17
   18
           Galen Healthcare Solutions, Inc 2009
   19
           Description: Update Active / In Progress tasks to a Remo
   20
                                                                III
       Messages
1 tasks updated
```

Allscripts, Provider - 10 Dec 2013 3:41 PM



## **Task Cleanup Step 3: Check Tasks for Updated Status**



Task	List								Personalize	
						Total /	Active Task	ı <b>s:</b> 8		
View:	Test Task Cleanup	▼ View Desc Show	ow: 100 ▼			Last U	Jpdated:	05/13/2	2014 4:25 PM 🔼	
Δ	Verity Patient Results	l est,Mike	Allscripts,Provider	Allscripts,Provider	11/06/2013 12:04	Active	464	-	130802091658540	
	Verify Patient Results	Allscripts,Baby	Allscripts,Provider	Allscripts,Provider	11/20/2013 10:17	Active	555		131120101316800	
Δ	Verify Patient Results	Allscripts,Betsy	Allscripts,Provider	Allscripts,Provider	12/12/2013 10:57	Active	631	•	ZZZTW03	
	Verify Patient Results	Rudd-Tester,Melissa	Allscripts,Provider	Allscripts,Provider	12/16/2013 02:01	Active	668		131204105721823	
	Verify Patient Results	Allscripts, Chris T	Allscripts,Provider	Allscripts,Provider	12/18/2013 11:02	Active	720		ZZZTW06	
	Verify Patient Results	Allscripts,Douglas	New Results	System	12/19/2013 08:13	Active	732		ZZZTW08	
	Verify Patient Results	Allscripts,Allison	Allscripts,Provider	Allscripts,Provider	01/31/2014 04:31	Active	860		ZZZTW01	
	Verify Patient Results	Allscripts, Caroline	Allscripts,Provider	Allscripts,Provider	02/16/2014 11:13	Active	916		140102090132890	
	Verify Patient Results	Allscripts,Henry	Allscripts,Provider	Allscripts,Provider	02/27/2014 06:50	Active	945		140227151753740	=
	Verify Patient Results	Test,Samy	Allscripts,Provider	Allscripts,Provider	04/03/2014 11:44	Active	1108		140204102504760	
	Verify Patient Results	Allscripts,Amber T	Allscripts,Provider	Allscripts,Provider	04/13/2014 06:32	Active	1146		ZZZTW02	
*	Verify Patient Results	Allscripts, Allison	Allscripts,Provider	Allscripts,Provider	06/18/2013 07:50	Complete	180		ZZZTW01	
Δ	Verify Patient Results	Allscripts,Diana T	Allscripts,Provider	Allscripts,Provider	05/22/2013 10:21	Complete	94		ZZZTW07	
Δ	Verify Patient Results	Allscripts,Betsy	Allscripts,Provider	Allscripts,Provider	11/04/2013 10:10	Complete	452		ZZZTW03	
		ALL THE STATE OF			11/04/2012 12:10		160		77771104	
Δ	Verify Patient Results	Allscripts,Evan	Allscripts,Provider	Allscripts,Provider	12/10/2013 03:41	Removed	621		130807084023183	A
	verify Facietic Results	Aliscripts, Douglas	Allocripts, Provider	Allscripts,Frovider	12/1//2012 12:00	Complete	14		22210000	
	Verify Patient Results	Allscripts,Douglas	Allscripts,Provider	Allscripts,Provider	12/17/2012 12:02	Complete	16		ZZZTW08	
	Verify Patient Results	Allscripts,Frank T	Allscripts,Provider	Allscripts,Provider	05/29/2013 03:58	Complete	121		ZZZTW10	-
E				1174/4742010000000000000000000000000000000000						
Comm	ients:			Task Abou	at:					

Provider: Allscripts, Provider

Task removed for Allscripts, Provider

vitalcenter •





## Use Case Example

- 'Submit Enc form' task removal. We have a clinic that experienced a workflow error with multiple encounter forms being created and consequently, the patients were getting double billed. We have found a workaround for the issue to remove all of the duplicate Submit Enc Form tasks.
- A new practice is going live and there are new doctors that haven't started working yet but have been added to receive results. Results are flowing into the system, but the doctor isn't there to verify the result yet and are getting a verify results task for each patient.



# Task Cleanup Demo





## Worklist Cleanup

- What Does It Do?
  - Removes Unwanted Worklist Items
- How Does It Work?
  - Filters based on Date, TaskStatus, UserName(s), Order Status Reasons, Patients
  - Can add custom annotation (optional)

#### Components

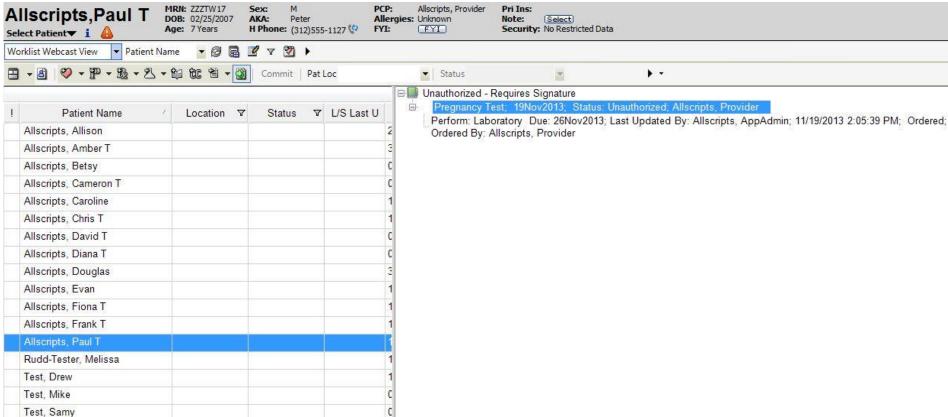
- Identification script to review worklist items
- Removal script to change statuses from tables that makeup worklist views





#### **Worklist Cleanup Step 1: Identifying Items**



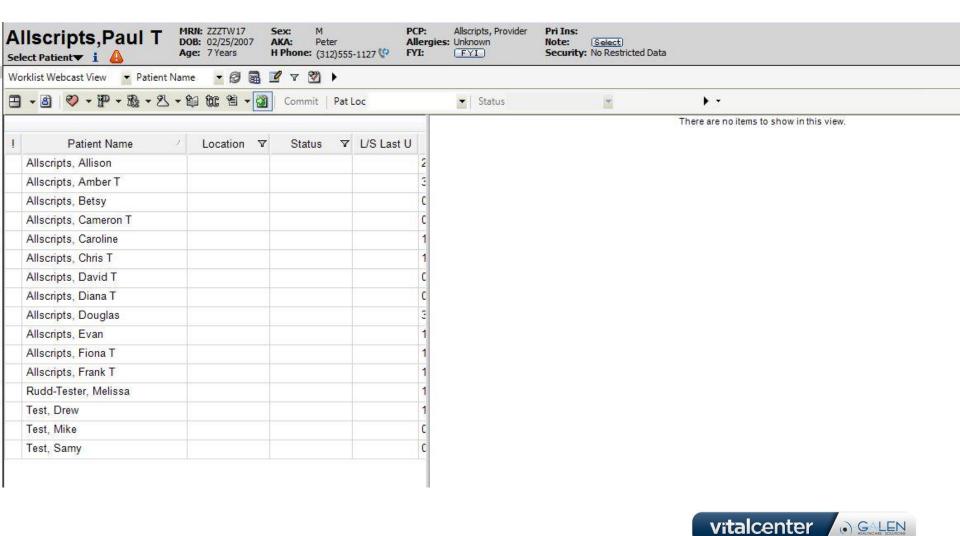




#### **Worklist Cleanup Step 2: Running Script**



#### Worklist Cleanup Step 3: Review Worklist for Removed Items





## Use Case Example

 Provider Allscripts is experiencing an issue where he has authorized all of his orders on the worklist, but an error in the system is causing all of these worklist items to still be present on the worklist. He is unable to remove any of the worklist items holding for requires authorization or requires signature from his worklist even though he has already gone through and authorized all of these items already.



# Worklist Cleanup Demo





## Problem Cleanup

#### What Does It Do?

- Transitions problems from one status to another status
  - e.g. Active Problems to Resolved

#### How Does It Work?

- Filters based on patient age, problem name, last assessed date, problem status
- Can either resolve or resolve and suppress

### Components

- Identification script of affected problems
- Stored procedure to take change problemincludeflags and problem status of desired problems





## **Problem Cleanup Step 1: Identifying Problems**

OrganizationMm		Problem	CreateDTTM	EntryName	ProblemIncludeFlags	
1	ZZZTW01	COPD (chronic obstructive pulmonary disease) wi	2013-08-07 08:45:12.947	Active	1	
2	ZZZTW01	lleostomy Care	2013-04-26 16:44:14.453	Active	4	
3	ZZZTW01	Asthma, allergic	2014-01-31 15:55:41.233	Active	1	
4	ZZZTW01	Visit For: Screening Malignant Neoplasm Colon	2014-03-26 10:37:02.463	Active	2	
5	ZZZTW01	Taking High-risk Medication	2014-03-26 10:37:02.993	Active	2	
6	ZZZTW01	Need For Vaccination Pneumococcal	2014-03-26 10:37:03.060	Active	2	
7	ZZZTW01	Vaccines Prophylactic Need Against Td	2014-03-26 10:37:03.120	Active	2	
8	ZZZTW01	Patient Education - Dietary	2014-03-26 10:37:03.263	Active	2	
9	ZZZTW01	Vaccines Prophylactic Need Against Influenza	2014-03-26 10:37:03.330	Active	2	
10	ZZZTW01	Vaccines Prophylactic Need Against DTP	2014-03-26 10:37:03.393	Active	2	
11	ZZZTW01	HTN (hypertension)	2014-01-31 16:07:26.370	Active	1	
12	ZZZTW01	Asthma, non-allergic	2014-01-31 15:55:40.800	Active	3	
13	ZZZTW01	Hypertension, essential	2014-04-21 13:39:15.100	Active	1	
14	ZZZTW01	Anticoagulated on Coumadin	2014-04-29 08:09:03.343	Active	1	
15	ZZZTW01	Asthma, allergic	2013-12-05 17:20:37.710	Active	4	
16	ZZZTW01	Atrial fibrillation	2014-04-29 07:57:51.547	Active	1	
17	ZZZTW01	Controlled diabetes mellitus	2013-12-05 17:20:37.667	Active	1	
18	ZZZTW01	Hyperlipemia	2014-04-21 13:32:34.333	Active	1	



#### **Problem Cleanup Step 1 Cont:**

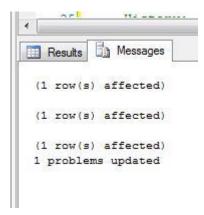






#### **Problem Cleanup Step 2: Running Script**

```
8
 9
10
11
   -- EXEC GHS ProblemListCleanup Resolve
12
   ALTER PROCEDURE [dbo].[GHS ProblemListCleanup Resolve]
13
14
15
   AS
16
17
18
        Galen Healthcare Solutions, Inc 2014
19
       Description: Finds all problems with a description, annotation or impression
20
21
       that fits the specified criteria and resolves them
22
23
24
```



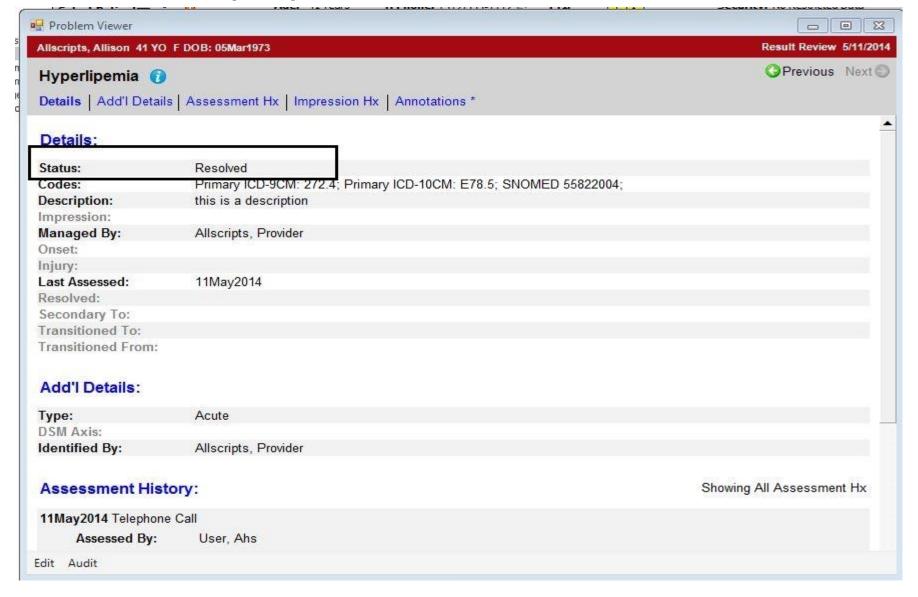


## **Problem Cleanup Step 3: Reviewing Problem Lists**

	Organization Mm	Problem	CreateDTTM	EntryName	ProblemIncludeFlags
26	ZZZTW01	Taking High-risk Medication	2014-03-26 10:37:02.993	Active	2
27	ZZZTW01	Need For Vaccination Pneumococcal	2014-03-26 10:37:03.060	Active	2
28	ZZZTW01	Vaccines Prophylactic Need Against Td	2014-03-26 10:37:03.120	Active	2
29	ZZZTW01	Patient Education - Dietary	2014-03-26 10:37:03.263	Active	2
30	ZZZTW01	Vaccines Prophylactic Need Against Influenza	2014-03-26 10:37:03.330	Active	2
31	ZZZTW01	Vaccines Prophylactic Need Against DTP	2014-03-26 10:37:03.393	Active	2
32	ZZZTW01	Viral sore throat	2014-03-26 15:32:53.290	Resolved	2
33	ZZZTW01	Infectious mononucleosis	2014-03-26 15:38:20.013	Resolved	2
34	ZZZTW01	Accidental Poisoning By Anticoagulants	2014-03-26 16:26:26:053	Resolved	2
35	ZZZTW01	HTN (hypertension)	2014-01-31 16:07:26,370	Active	1
36	ZZZTW01	Never a smoker	2013-11-20 10:43:52.383	Entered in Error	0
37	ZZZTW01	Asthma, non-allergic	2014-01-31 15:55:40.800	Active	3
38	ZZZTW01	Hypertension, essential	2014-04-21 13:39:15.100	Active	1
39	ZZZTW01	Anticoagulated on Coumadin	2014-04-29 08:09:03.343	Active	1
40	ZZZTW01	Asthma, allergic	2013-12-05 17:20:37.710	Active	1
41	ZZZTW01	Atrial fibrillation	2014-04-29 07:57:51.547	Active	1
42	ZZZTW01	Controlled diabetes mellitus	2013-12-05 17:20:37.667	Active	1
43	ZZZTW01	Hyperlipemia	2014-04-21 13:32:34.333	Resolved	2



#### **Problem Cleanup Step 3 Cont:**





## Use Case Example

 A clinic has found that many of its patients have active problems such as influenza, strep pharyngitis as well as many pregnancy entries that have been active for over 12 months. The clinic has come to the conclusion that all of the entries (active greater than 12 months) should be resolved.



# Problem Cleanup Demo





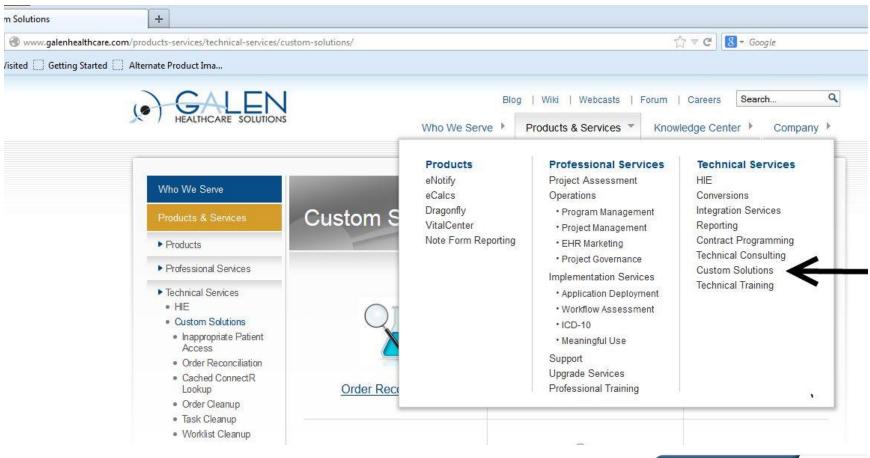
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