

### **Results Verification**

Workflows November 22, 2013

**Empowering Extraordinary Patient Care** 



#### **Todays presentors**.....

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## Your phone has been automatically muted. Please use the Q&A panel to ask questions during the presentation!





## **Result Verification Agenda**

- Introduction to Results Verification
- Considerations prior to starting
- Preferences, General and Results
- Worklist, Task lists and Worklist View
- Dictionaries and Note Types
- User setup and Security
- Demonstrate Workflows
- Q & A



### **Results Verification How is it Intended to Work?**

**Results are received via Interface as a Task** 

Verify Patient Result Task goes to the providers

**Providers verify Results and select the Patient Communication** method

**Clinical staff communicate Results to patient** 

Verified Result is available in chart and can be trended



### Considerations

- How do results come back?
- Who will be verifying results?
- How are results verified when covering an absence?
- How are verified results documented and then communicated to the patient?
- Worklist and Task List



## **Mock Client Workflows**

- Internal Medicine practice with Residents.
- Providers and Residents verify results starting from their My Active Task list.
- Providers and Residents cover for each other using an Order-Results Coverage Task list.
- Resident's result notes are reviewed and co-signed by their Supervising Provider.
- Call Patient with Results, and Schedule F/U tasks are routed to clinical staff.
- Mail Patient Result tasks are routed to Medical Records.



### **General Preferences**

- Encounter Selection from Workist
- Encounter Type for Worklist
- WorkspaceViewTasks

| Treferences  |             |  |  |                   |
|--|-------------|--|--|-------------------|
|  |             |  |  |                   |
|  |             |  |  |                   |
|  |             |  |  |                   |
| Preference: General  | <b>*</b>    |  |  |                   |
| Preference V   | SubKey 🏾 🖓  | Description V  | Value V  | User Can Override |
| DefaultClinicalSummaryDocument                             |             | Sets the default Clinical Summary document to be used when printing, if no structured Note is defined as | CED  |                   |
| DefaultEnteringForProviderID                               |             | Default Entering For Provider ID   |  | <b>V</b>          |
| DefaultSpecialtyID   |             | Default Specialty ID   | Family Medicine                                  | <b>V</b>          |
| DefaultSupervisingProviderID                               |             | Default Supervising Provider ID  |  | <b>V</b>          |
| DefaultToQuickListFavorites                                |             | Default to QuickList Favorites   | N  | <b>V</b>          |
| DictionaryCache  |             | Dictionary Cache   |  |                   |
| DictionaryEdit   | MaxRowCount | Dictionary Edit Max Count  | 1000   |                   |
| DirectivesEditable   |             | DirectivesEditable   | N  |                   |
| Display <r> in Patient Banner for Restricted Documents</r> |             | Display <r> in Patient Banner for Restricted Documents</r>   | Y  |                   |
| DisplayFutureEncounters                                    |             | Show future encounters in selector X days in the future  | 1  |                   |
| DisplayPatientPicture                                      |             | DisplayPatientPicture  | N  |                   |
| Double Click Action  |             | Double Click Action  | View   | V                 |
| Due/Start Date of a Newly Added Bulk Enrollment            |             | Due Date or Start Date for Newly Added Bulk Enrollment   | Start Date same as date of newly added Bulk Enro |                   |
| Enable Allergy Verification                                |             | Enable Allergy Verification  | N  |                   |
| Enable E-Prescribe G Code Alert                            |             | Enable E-Prescribe G Code Alert  | Y  | <b>V</b>          |
| EnableCSOnScheduleDaily                                    |             | Enables the Clinical Summary Icon on Daily Schedule  | Y  | <b></b>           |
| EnableCSOnScheduleProvider                                 |             | Enables the Clinical Summary Icon on Provider Schedule   | N  |                   |
| EnableMSHV   |             | Enable Microsoft HealthVault?  | N  |                   |
| EnableTOCOnScheduleDaily                                   |             | Enables the Transition of Care Checkbox on Daily Schedule  | Y  |                   |
| EnableTOCOnScheduleProvider                                |             | Enables the Transition of Care Checkbox on Provider Schedule   | N  |                   |
| Encounter Selection from Worklist                          |             | Encounter Selection from Worklist  | Create New Encounter                             |                   |
| Encounter Type For Worklist                                |             | Encounter Type For Worklist  | Chart Update                                     |                   |
|  |             |  |  |                   |

| WorkspaceViewTasks | Workspace view for tasks that navigate to worklist | Worklist Desktop View |
|--------------------|--|-----------------------|



### **Result Preferences**

#### **Provider Preferences**

| Result Verification Append Staff Message to Task Comment Default For Verify | γ   |
|---|---|
| Result Verification Disable To/CC   | Ν   |
| Result Verification If Did Not Order  | Warn  |
| Result Verification Navigate After Review                                   | Stay on Worklist                                  |
| Result Verification Navigation After QVerify                                | Go To Next Patient                                |
| Result Verification Note Type For QVerify                                   | Result Note FoS                                   |
| Result Verification Note Type For Verify                                    | Result Note FoS                                   |
| Result Verification Note Use For Qverify                                    | Create New Note                                   |
| Result Verification Note Use For Verify                                     | Create New Note                                   |
| Result Verification Patient Communication Methods For Qverify               | Mail Results to Patient                           |
| Result Verification Patient Communication Methods For Verify                | Call patient with results;Mail Results to Patient |
| Result Verification Task Assignment   | Ordering Provider                                 |
| Result Verification Shows Verified Results in results document for QVerify  | Υ   |
| Result Verification Shows Verified Results in results document for Verify   | Υ   |

#### **Resident Preferences**

| Y   |
|---|
| N   |
| Warn  |
| Stay on Worklist                                  |
| Go to Note  |
| Result Note                                       |
| Result Note                                       |
| Create New Note                                   |
| Create New Note                                   |
| Mail Results to Patient                           |
| Call patient with results;Mail Results to Patient |
| Ordering Provider                                 |
| Y   |
| Y   |

A note is created for every verified result.

Provider Note Type: A Result Note that finalizes on save.

Resident Note Type: Prompts the Resident to send a task to their Supervising Provider to co-sign.



### **Worklist Desktop View**

| ∎ Edit View Dialog  | X   |
|---|---|
| View  |   |
| Worklist Desktop View    New  Delete  | Make Default View Open in Full Screen Display   |
| 1         2         1         3         1         2         1           2         3         1         3         3         2         3           View1         View2         View3         View4         View5         View6 | 1 2<br>3 4<br>View7 View8   |
| Allergies Health Management Plan Chart Viewer Encounter   | Meds/Orders Problem Patient Worklist  |
| Group Group Add Selected  | Group Group Add Selected  |
| Encounter   | Flowsheets  |
| Patient Worklist Problem Allergies Immuns   | ChartViewer Health Mgmt Orders Meds   |
| Component Name<br>Display Name: Patient Worklist<br>Default View: <user default=""></user>  | Component Name Display Name: ChartViewer Default View: < User Default >   |
| <ul> <li>○ Order and Result Managem</li> <li>○ Order Management</li> <li>✓ Order-Result Group Cover</li> <li>✓ Order-Result Management</li> <li>✓ Orders Requiring FU</li> </ul>  | All by Owner by Encounter I Hem/Onc Last 5 yrs     All by Problem     M Last 5 yrs     All by Problem by Encoun I Nephrology Last 5 yrs     All by Section     Veurology Last 5 yrs     All by Section by Sub-Se I OB/GYN Last 5 yrs     All by Section by Sub-Se I Defect forthere |
|   | Save As OK Cancel Apply   |



### Order-Result Management Worklist Configuration

#### **Order Status Reason**

- Requires Authorization
- Requires Signature
- Requires Verification
- Retrospective Authorization
- Retrospective By Protocol Authorization
- Review By Current Provider
- Requires Verification-Review Status-Show All

| Add / Edit  | <b>Views</b> Manage  | Enterprise   |   |   |  |
|---|--|--|---|---|--|
| View:<br>Desc:  | Order-Result I<br>for prescription<br>verification or i  | Management<br>ns or orders that require au<br>review. This view meant to | thorization and results that require worked by a Provider (curr | uire Default Dis<br>ent Collaps<br>Expand | New play Mode e All FirstNode                        |
|   | Display Un   | verified Items for Current F<br>urrent Patient Only in Pati              | Patient<br>ent Worklist   | Expand                                    | All  |
| Derform   | ing Provider   | Order Status   | Order Type  | Order Priority                            | Aboormal Level                                       |
| Encou   | nter Status  | Reg Perf Loc   | Where Performed   | Authorizing Provider                      | Billing Provider                                     |
|   | Misc   | Sites  | Patient Locations   | Orderable Items                           | Ordering Providers                                   |
| Require<br>Require<br>Require<br>Retrosp<br>Rx Benn<br>Also Inclu | s Authorization<br>s Signature<br>s Verification<br>ective Authoriza<br>ective By Protoc<br>fit Plan<br>de<br>w By Current Pro | tion<br>col Authorization<br>Unverifi<br>ovider Mec                      | ed Items<br>dications<br>upications                             | Requires V<br>Hide Re<br>Show R           | erification - Review Status<br>viewed<br>viewed Only |

#### **Ordering Providers**

- Ordering Providers Current Provider
  - Use Ordering Providers filter, because the ordered by and supervised by fields for a resulted order could be different in our example.
- Default to Expand All

| Add / Edit \ | <b>/iews</b> Manage  | Enterprise                    |                       |                                       |                    |  |  |  |
|--------------|--|-------------------------------|-----------------------|---------------------------------------|--------------------|--|--|--|
| View Info-   | View III Order-Result Management   New New   |                               |                       |                                       |                    |  |  |  |
| Desc:        | Desc: for prescriptions or orders that require authorization and results that require verification or review. This view meant to be worked by a Provider (current verification or review. This view meant to be worked by a Provider (current verification or review. This view meant to be worked by a Provider (current verification or review. This view meant to be worked by a Provider (current verification or review. This view meant to be worked by a Provider (current verification or review. This view meant to be worked by a Provider (current verification or review. This view meant to be worked by a Provider (current verification or review. This view meant to be worked by a Provider (current verification or review. This view meant to be worked by a Provider (current verification or review. This view meant to be worked by a Provider (current verification or review. This view meant to be worked by a Provider (current verification or review. This view meant to be worked by a Provider (current verification or review. This view meant to be worked by a Provider (current verification or review. This view meant to be worked by a Provider (current verification or review. This view meant to be worked by a Provider (current verification or review. This view meant to be worked by a Provider (current verification or review. This view meant to be worked by a Provider (current verification or review. This verification of the provider (current verification or review. This verification of the provider (current verification or review. This verification of the provider (current verification or review. This verification of the provider (current verification or review. This verification of the provider (current verification or review. This verification of the provider (current verification or review. This verification of the provider (current verification or review. This verification of the provider (current verification or review. This verification of the provider (current verification or review. This verification of the provider (curren |                               |                       |                                       |                    |  |  |  |
|              | Display Un   | verified Items for Current Pa | tient                 | <ul> <li>Expand</li> </ul>            | All                |  |  |  |
|              | Default to C   | urrent Patient Only in Patier | nt Worklist           |                                       |                    |  |  |  |
| Clinic       | al Source  | Review Needed                 | Order Type            |                                       |                    |  |  |  |
| Performi     | ing Provider   | Order Status                  | 🚽 Order Status Reason | Order Priority                        | Abnormal Level     |  |  |  |
| Encou        | nter Status  | Req Perf Loc                  | Where Performed       | Authorizing Provider Billing Provider |                    |  |  |  |
| 1            | Visc   | Sites                         | Patient Locations     | Orderable Items                       | Ordering Providers |  |  |  |
| Item(s)      |  |                               |                       |                                       |                    |  |  |  |
|              |  |                               |                       |                                       |                    |  |  |  |
|              |  |                               |                       |                                       |                    |  |  |  |
|              |  |                               |                       |                                       |                    |  |  |  |
|              |  |                               |                       |                                       |                    |  |  |  |
|              |  |                               |                       |                                       |                    |  |  |  |
|              |  |                               |                       |                                       |                    |  |  |  |
|              |  |                               |                       |                                       |                    |  |  |  |
|              |  |                               |                       |                                       |                    |  |  |  |
|              |  |                               |                       |                                       |                    |  |  |  |
| Current      | Provider   |                               |                       |                                       | Add                |  |  |  |



### Order-Result Group Coverage Worklist Configuration

#### **Order Status Reason**

- Requires Authorization
- Requires Signature
- Requires Verification
- Requires Verification-Review Status-Show
   All

#### Group coverage contains results that have been Reviewed in

| Worklist Vie  | w Editor   |               |                       |                      | <b>×</b>           |  |  |
|---|--|---------------|-----------------------|----------------------|--------------------|--|--|
| User © Enterprise Manage Views For: Enterprise Views  |  |               |                       |                      |                    |  |  |
| Add / Edit Views Manage Enterprise<br>View Info<br>View: Order-Result Group Coverage   New  |  |               |                       |                      |                    |  |  |
| Desc: for orders that require authorization and results that require verification/review as part of a regularly scheduled on-call coverage. Leave   |  |               |                       |                      |                    |  |  |
|   | Display Unverified Items for Current Patient     Default to Current Patient Only in Patient Worklist |               |                       |                      |                    |  |  |
| Clinic  | cal Source   | Review Needed | Order Type            |                      |                    |  |  |
| Perform   | ing Provider   | Order Status  | 🚽 Order Status Reason | Order Priority       | Abnormal Level     |  |  |
| Encou   | inter Status   | Req Perf Loc  | Where Performed       | Authorizing Provider | Billing Provider   |  |  |
|   | Misc   | Sites         | Patient Locations     | Orderable Items      | Ordering Providers |  |  |
| Item(s)         Requires Authorization         Requires Signature         Requires Verification         Retrospective Authorization         Retrospective By Protocol Authorization         Rx Benefit Plan |  |               |                       |                      |                    |  |  |
| Also Include Unverified Items Requires Verification - Review Status Hide Reviewed Only Show Reviewed Only Orders Show All   |  |               |                       |                      |                    |  |  |

#### **Ordering Providers**

- Covering Providers group: Internist and Residents
  - Use Ordering Providers filter, because the ordered by and supervised by fields for a resulted order could be different in our example.

#### Default to Expand All

| Add / Edit \ | /iews Manage  | Enterprise                    |                       |                      |                    |  |  |  |  |
|--------------|---|-------------------------------|-----------------------|----------------------|--------------------|--|--|--|--|
| -View Info   | View Info   |                               |                       |                      |                    |  |  |  |  |
| View:        | View: Order-Result Group Coverage   |                               |                       |                      |                    |  |  |  |  |
| Desc:        | Desc: for orders that require authorization and results that require verification/review as part of a regularly scheduled on-call coverage. Leave |                               |                       |                      |                    |  |  |  |  |
|              | Display Unv   | verified Items for Current Pa | atient                | Expand.              | All                |  |  |  |  |
|              | Default to Current Patient Only in Patient Worklist   |                               |                       |                      |                    |  |  |  |  |
| Clinic       | al Source   | Review Needed                 | Order Type            |                      |                    |  |  |  |  |
| Perform      | ing Provider  | Order Status                  | 🚽 Order Status Reason | Order Priority       | Abnormal Level     |  |  |  |  |
| Encou        | nter Status   | Req Perf Loc                  | Where Performed       | Authorizing Provider | Billing Provider   |  |  |  |  |
| 1            | Visc  | Sites                         | Patient Locations     | Orderable Items      | Ordering Providers |  |  |  |  |
| Ttem(s)      |   |                               |                       |                      |                    |  |  |  |  |
| Allscript    | s, Internist  |                               |                       |                      |                    |  |  |  |  |
| Allscript    | s, Residents  |                               |                       |                      |                    |  |  |  |  |



### Order-Result Group Coverage Task List

| Manage I  | Personal                                   | Personal Views Enterprise Views C   | ustom Task Filte | rs <mark>-</mark>           |  |
|---|--|---|------------------|-----------------------------|--|
| Enter<br>For:<br>View:  | <b>Tprise V</b><br>Enterprise<br>Order-Res | liews<br>sult Group Coverage  | New              | Sorts<br>1                  | <ul> <li>Ascending</li> <li>Descending</li> <li>Ascending</li> </ul>   |
| Desc:   | A covera <u>c</u><br>order aut             | ge task list for result verification and<br>horization.                           | • •              | 3                           | <ul> <li>Descending</li> <li>Ascending</li> <li>Descending</li> </ul>  |
| Assign<br>Create<br>Create<br>Delega<br>Overd<br>Patien<br>Prioritt<br>Status<br>Task | ed To<br>ed By<br>ated<br>ue<br>t<br>y     | Is Not       Active       Complete       In Progress       Inactive       Removed | Ī                | Sta<br>Ac<br>In<br>An<br>Ve | tive<br>Progress<br>d Task Is<br>thorize Order<br>rify Patient Results |
| Custo   | m:   | -   |                  | And Alls                    | d Assigned To Is<br>scripts,Internist<br>scripts,Residents             |

After navigating to the Worklist Desktop View from these tasks, the user must manually select Order-Result Group Coverage Worklist View to be able to see another Ordering Provider's results.



### Clinical Staff Results Communication Task List

| Task Admin                                     | Manage f | Personal    | Personal Views Enterprise Views Custom Ta | sk Filters | , A       |                  |   |
|--|----------|-------------|---|------------|-----------|------------------|---|
| CareGuide Admin<br>Charge Admin<br>Chart Admin |          |             |   |            |           |                  |   |
| Comm Admin<br>Concept Mapping                  | Ente     | rprise V    | liews                                     |            | - Sorts - |                  | Assaudius   |
| Dictate Admin<br>Dictionaries                  | For:     | Enterprise  |   |            | 1         | •                | <ul> <li>Ascending</li> <li>Descending</li> </ul> |
| Document Admin<br>Group Admin                  | View:    | Results C   | ommunication Go New                       |            | 2         |                  | Ascending   |
| Note Admin                                     | Desc:    | Clinical St | aff view to follow-up on results          | •          |           | •                | Descending  |
| Org Setup<br>PHB Comp Admin                    |          | Results an  | nd Schedule Results F/Up                  | _          | 3         | •                | <ul> <li>Descending</li> </ul>                    |
| PHB Sec Admin<br>Pon Health Mamt               | Filters  | :           | ● Is ○ Is Not                             | <b>Y</b>   |           |                  |   |
| Preferences                                    | Assign   | ed To       | <ul> <li>Yes</li> </ul>                   |            |           | Task Is          |   |
| Queue Admin<br>Provider Admin                  | Create   | ed<br>ed By | © No                                      |            |           | Call Patient w   | ith results                                       |
| Results Admin                                  | Delega   | ated        |   |            |           | Schedule Res     | ults F/Up   |
| Pt List Admin                                  | Overd    | ue          |   |            |           | And Status I     | S   |
| Security Admin                                 | Patien   | t           |   |            |           | Active           |   |
| Task Admin                                     | Status   | y<br>;      |   |            |           | In Progress      |   |
| TWUser Admin                                   | Task     |             |   |            |           | And Created      | l By Is   |
| Utilities                                      |          |             |   |            |           | Allscripts, Prov | vider   |
| V10 Note Admin                                 | Custo    | m:          |   |            |           | Allscripts,Resi  | dent  |
| WORK DELAUMIN                                  |          |             |   |            |           |                  |   |



### Medical Records Task List

| Manage f   | Personal   | Personal Views Enterprise Views  | Custom Task Filte               | ers  |  |
|--|--|--|---------------------------------|--|--|
| Enter<br>For:<br>View:<br>Desc:  | Patient Re<br>Contains<br>request te<br>records re | views<br>equest Team<br>tasks that are assinged to the p<br>eam that includes the mgmt of a<br>equests | Go New<br>atient<br>all medical | Sorts       1     Priority       2     Assigned To       3     Patient                               | <ul> <li>Ascending</li> <li>Descending</li> <li>Ascending</li> <li>Descending</li> <li>Ascending</li> <li>Ascending</li> <li>Descending</li> <li>Descending</li> </ul> |
| Filters<br>Assign<br>Create<br>Delega<br>Overd<br>Patien<br>Priority<br>Status<br>Task | ed To<br>ed<br>ed By<br>ated<br>ue<br>t<br>y<br>m: | ● Is O Is Not<br>Active<br>Complete<br>In Progress<br>Inactive<br>Removed                              |                                 | Status Is<br>Active<br>In Progres<br>And Assig<br>Patient Re<br>And Task<br>Mail Resul<br>Miscellane | ss<br>gned To Is<br>equest Team<br>c Is<br>Its to Patient<br>eous  |



### **Task Name Dictionary**

| vicuonaries                   | vicuonaries                         |                   |            |          |
|-------------------------------|-------------------------------------|-------------------|------------|----------|
| CareGuide Admin               |                                     |                   |            |          |
| Charge Admin                  |                                     |                   |            |          |
| Chart Admin                   |                                     |                   |            |          |
| Comm Admin                    | Dictionary: Task Name 🔻 🧭 📖         |                   |            |          |
| Concept Mapping               | Name                                | Mnemonic $\nabla$ | Code V     | Inactive |
| Dictate Admin                 | ABN Follow-up                       | ABNFup            | V41-02     |          |
| Document Admin                | ABN Order Follow-up                 | ABNOrdFolp        | ABNOrdFolp |          |
| Group Admin                   | Ad Hoc Note                         | AdHcNote          | 103        |          |
| Note Admin                    | Ad Hoc Result                       | AdHcRsIt          | 104        |          |
| Org Setup                     | Adjust Charges                      | CanChrg           | V36-01     |          |
| PHB Comp Admin                | Audit Order Int                     | AuditOrdI         | AuditOrdI  |          |
| PHB Sec Admin                 | Auth Order Int                      | AuthOrdI          | AuthOrdI   |          |
| Pop Health Mgmt               | Authorize Non-Formulary Medication  | AuthNonF          | AuthNonF   |          |
| Preferences                   | Authorize Order                     | AuthOrd           | V48-01     |          |
| Queue Admin<br>Provider Admin | Authorized Order                    | AuthdOrd          | AuthdOrd   |          |
| Results Admin                 | Authorized Rx                       | AuthMed           | AuthMed    |          |
| Pt List Admin                 | Call Back                           | CallBack          | 117        |          |
| Report Admin                  | Call In Cancel Rx                   | CallCanRx         | CallCanRx  |          |
| Security Admin                | Call In Failed Rx                   | CallFailRx        | CallFailRx |          |
| Task Admin                    | Call In Rx                          | CallInRx          | CallInRx   |          |
| TWUser Admin                  | Call Order                          | CallOrd           | CallOrd    |          |
| Utilities                     | Call Patient Communication          | CallPtComm        | CallPtComm |          |
| V10 Note Admin                | Call Patient with results           | CALLPTV11         | CALLPTVII  |          |
| Work Def Admin                | Call Pt with Results                | PTCALL            | PTCALL     |          |
|                               | Call ResultsN                       | CallResN          | 4005       |          |
|                               | Call ResultsR                       | CallResR          | 4003       |          |
|                               | Check Benefits - ct                 | CB - ct           | CB - ct    |          |
|                               | Check Benefits-KW                   | CB-KW             | CB-KW      |          |
|                               |                                     |                   |            |          |
|                               | ☆ Detail 1                          |                   |            |          |
|                               | Task Action: Process Note Results 💌 | V Delegate        |            |          |



## **Result Communications Dictionary**

• Adding an item to the Result Communications Dictionary

| Dictionary: Result Communications 🔹 🤣 🛄 |  |            |            |          |
|---|--|------------|------------|----------|
| Code 7                                  | · Name 꼬                                     | Mnemonic 꼬 | Inactive 5 | Enforced |
| PTCALL                                  | Call patient with results                    | PTCALL     |            | ✓        |
| DISCUSS                                 | Discussed results with patient               | DISCUSS    |            |          |
| PTCOPY                                  | Mail Results to Patient                      | PTCOPY     |            | 1        |
| NOCOMM                                  | No patient communication needed at this time | NOCOMM     |            |          |
| MEDEM                                   | Post to Medem                                | MEDEM      | V          | 1        |
| POL                                     | Post to Patient On Line                      | POL        |            | 1        |
| PYSPTCALL                               | Provider will call patient with results      | PYSPTCALL  |            |          |
| PTAPPT                                  | Schedule appointment to discuss results      | PTAPPT     |            | V        |



#### Document Type Dictionary Result Note and Result Letter

#### Resident

| Dictionary: Document Type 🔹 😥 🏢  |  | Dictionary: Document Type 🔹 😥 🏢  |                                       |
|--|--|--|---------------------------------------|
| Search: Name   Starting With   result  | Grid 🔻                                   | Search: Name  Contains  FoS  | Grid 🗸                                |
| Code 🛛 🏹   | Name                                     | Code 7   | Na                                    |
| RSLLTR   | Result Letter                            | RSLLTR_FOS   | Result Letter FoS                     |
| RSLNOTE  | Result Note                              | RSNOTE_FOS   | Result Note FoS                       |
| RSLLTR_FOS   | Result Letter FoS                        |  |                                       |
| RSNOTE_FOS   | Result Note FoS                          |  |                                       |
| ★ General Properties       Required Finalization<br>Authority:     Level 8     ✓     Mail       Required Owner Authority:     Level 6     ✓     Difficition  | nifestation: NOTEFORM   Illy Factor: 1.0 | ★ General Properties       Required Finalization     Level 8     Max       Authority:     Level 6     Diffice       WorkElow     Electropic Signature     Max  | nifestation: NOTEFORM    ulty Factor: |
| WorkFlow: Electronic Signature 🔻   | Security Codes                           | WorkFlow: Electronic Signature   | Security Codes                        |
| ☆ General Properties II  |  | ☆ General Properties II  |                                       |
| Display Note Icon on Schedule       Image: Prompt User to Route for Fill         Include in Unsigned Notes Report       Is Result         Auto CC       Is Letter         Allow eReply to Patient       Prompt For Signature Over         Req Corr - Allow Invalidate Only       Is Clinical Summary | urther Signature                         | <ul> <li>Display Note Icon on Schedule</li> <li>Prompt User to Route for Fill</li> <li>Include in Unsigned Notes Report</li> <li>Is Result</li> <li>Auto CC</li> <li>Is Letter</li> <li>Allow eReply to Patient</li> <li>Prompt For Signature Over</li> <li>Req Corr - Allow Invalidate Only</li> <li>Is Clinical Summary</li> </ul> | urther Signature<br>ride              |
| * Note Properties  |  | * Note Properties  |                                       |
| General Description: TW Result Letter Is Sub Type Parent Form: Finalize Note on Save   | •  | General<br>Description: Result Letter FoS<br>Is Sub Type Parent Form:  | ·                                     |

#### **Provider**



#### **Input Templates**

#### Resident

#### **Provider**

| Note Input Template Properties   |   | ×  |
|--|---|--|
| Document Type: Result Note Assign Specialties Add Delete   | Description:     Gender     Gender     Gender     Male     C Female                           | Clear  |
| <ul> <li>Filter Default Note Forms by Selected Specialty</li> <li>Note Attributes</li> <li>Security</li> <li>Finalization Authority: Level 8</li> <li>Note Owner Authority: Level 6</li> </ul> | Security Codes  | _  |
| Prompt to Route for Signature<br>Permanently Lock Note when Finalized  | eReply to Patient     Force Amendment if:   | Create Note Icon in Schedi   |
| Referring Provider Notification on Finalization     Patient Notification Task on Finalization     Review Covered Note on Finalization  | Annotation Added     Carbon Copy Added or Edited     Encounter Changed     Note Owner Changed | <ul> <li>Visible on Saving</li> <li>Visible on Initial Signing</li> <li>Visible on Finalization</li> </ul> |

| P Note Input Template Properties   |  | <u> </u>  |
|--|--|---|
| Document Type: Result Note FoS Assign Specialties Add Delete Filter Default Note Forms by Selected Specialty                   | T Description:<br>Gender<br>G Both<br>C Male<br>C Female         | Clear   |
| Note Attributes      Security      Finalization Authority:      Level 8      Note Owner Authority:     Level 6                 | Security Codes   |   |
| Prompt to Route for Signature Permanently Lock Note when Finalized Create Task Referring Provider Notification on Finalization | eReply to Patient     Force Amendment if:     Annotation Added   | Create Note Icon in Schedi Note Visibility  Visible on Saving                   |
| Patient Notification Task on Finalization Review Covered Note on Finalization  | Carbon Copy Added or Edited Encounter Changed Note Owner Changed | <ul> <li>Visible on Initial Signing</li> <li>Visible on Finalization</li> </ul> |



#### **Output Templates**

### Result Note Result Letter

| Note Output Template Properties   |   | <b></b> X  | 💀 Note Output Template Properties   |  | ×   |
|---|---|--|---|--|---|
| Input Template Properties     Document Type: Result Note     Specialties:   | Age:<br>Gender: Unknown   |  | Document Type: Result Note  | Age:<br>Gender: Unknown  | _   |
| Document Type: Result Note  | ▼ Allow   | / Section Auto-Insert  | Document Type: Result Letter  | - Allow  | v Section Auto-Insert   |
| Note Attributes  Security  Finalization Authority: Level 8  Note Owner Authority: Level 6   | Security Codes  |  | Note Attributes      Security      Finalization Authority: Level 8      Note Owner Authority: Level 6 | Security Codes   |   |
| Create Task Create Task Referring Provider Notification on Finalization Patient Notification Task on Finalization Call Patient with Results when requested Mail Results to Patient when requested | Show Note Amendments Force Amendment if: Annotation Added Carbon Copy Added or Edited | Amendment Format Note Visibility  Visible on Saving  Visible on Initial Signing  Visible on Finalization |   | Show Note Amendments  Force Amendment if:  Annotation Added  Carbon Copy Added or Edited | Amendment Format Note Visibility Visible on Saving Visible on Initial Signing Visible on Finalization |



#### **User Set-Up**

#### Provider

#### Resident

|  | User/Provider Allscripts Resident  |
|--|--|
| Jser/Provider Allscripts Provider  | Default Site: Burlington Clinic   Profession: Resident   Preferences   |
| Default Site: Burlington Clinic    Profession: Physician   Preferences  Employeet  Emplo | Employee#: Finalization Authority: Level 6  Fingerprint Condectials Ownership Authority: Level 6                         |
| Credentials M.D.   | Title :  |
| Title :  | Password Never Expires     Force Password Change     Physician Homebase User     Electronic Workflow                     |
| ☆ Provider Detail I  | ☆ Provider Detail I  |
| Code: TWP01 Mnemonic: TWP01 CME Pilot Ordering Authority: 8 🔆  | Code: TWP03 Mnemonic: TWP03 CME Pilot Ordering Authority: 6  |
| Prim. Specialty: Internal Medicine   DEA #: TW1111111 DEA Exp 31Jan2029  | Prim. Specialty: Internal Medicine   DEA #: TW3333333 DEA Exp 31Jan2029  |
| Sec. Specialty:       Image: Constraint of the system of the   | Sec. Specialty:  C C When Others Verify Their Results Billing Provider  C Schedulable Don't Generate "Send Charge" Tasks |
| PCP Secure Schedule Show Optional Clinical Messages  | PCP Secure Schedule Show Optional Clinical Messages  |
| * Provider Detail II   | * Provider Detail II   |
| ✓ II     ✓ III     ✓ III     ✓ III     ✓ III     ✓ III     ✓ III     ✓ IIII     ✓ IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII   | Prescribing Authority Levels - DEA Schedules Outbound Dictate ID TW03  |
| Rx Supervision Required Transcribe Difficulty:   | II III V V License Recording Formal GSM V  |
| Res. ID: TWP01 Alt. License:   | Rx Supervision Required     Transcribe Difficulty:       1.0 ÷   |
| UPIN: Signature Image:   | Res. ID: TWP03 Alt. License:   |
| Def. CC Method Review Task   | UPIN: Signature Image:   |
|  | Def. CC Method Review Task   |



### **Provider and Resident Security**

#### **Provider Security Classification**

#### Assigned Security Codes

Break Glass

Can Prescribe

Chart-Alert-Edit

Chart-Alert-View

Chart-Download

Chart-Edit

Chart-Print

Chart-View Document-Invalidate Order-Edit Patient Profile - Edit Results-Edit

Results-Invalidate

Results-Verify

#### **Resident Security Classification**





### **Context Menu**

| Provider J Show VTB                          |                          |                      |
|--|--------------------------|----------------------|
| Chart Daily Clinical Desktop Note            | View                     | nt Lists 🚬 Documen   |
| Allscripts Douglas T MRN: ZZZTW08            | View in new window       | FYI: FYI             |
| DOB: 03/10/1953                              | Void                     | Other: TW00          |
|  | Authorize                |                      |
| Worklist Desktop View                        | Authorize All            |                      |
|  | Completed Today          | ▼ Status             |
| Patient Worklist Problem Allergies Immuns Er | Completed On             |                      |
| Order-Result Managem                         | Order D/C                |                      |
| 1 Items : 22 Active Patient Tasks            | Record D/C               |                      |
| Resulted - Requires Verification             | Enter in Error           |                      |
| 📄 🛄 🖳 Blood Glucose Allscripts, Prov         | Edit                     | st2013 12:25PM       |
| Test Result                                  | Print Results            |                      |
| Glucose Finger Stick 70 mg/dl                | Annotate                 |                      |
|  | Enter Result             |                      |
|  | Print Requisition        |                      |
|  | Update Pt Address        |                      |
|  | Update Pharmacy          |                      |
|  | Update All Pharmacy      |                      |
|  | Record as admin          |                      |
|  | Covered Problems         |                      |
|  | Record as sample         |                      |
|  | Verify and Add           |                      |
|  | Review                   |                      |
|  | Review All               |                      |
|  | QVerify                  |                      |
|  | QVerify All              |                      |
|  | Verify                   |                      |
|  | Verify All               |                      |
|  | Order                    |                      |
|  | Remove                   |                      |
|  | Enter in Error Results   |                      |
|  | Update Provider          |                      |
|  | Task                     |                      |
| Authorize All Verify - QVerify All Void Re   | Cite selected            | Results              |
| User: twprovider Site: Burlington Clinic E   | Advanced Result Citation | Enc Type: Chart Upda |



### **Result Verification Dialog Box Details**

| ResultsVerificationDialog                        |  |                          |                          |                 |
|--|--|--------------------------|--------------------------|-----------------|
| Test, Gary 32 YO M DOB: 01J                      | lan1981  |                          |                          | AUDIT 11/1/2013 |
|  |  |                          |                          | 8 📰             |
| Patient Communications                           |  |                          |                          |                 |
| Call Pt with Results                             | Output renders in the                                    | Task                     |                          |                 |
| Schedule Results F/U                             | Output renders i   | n the Task               |                          | Π               |
| Mail Results To Patient                          |  |                          |                          |                 |
| Discussed results with patient communication     | nt<br>needed at this time<br>h results                   |                          |                          |                 |
| Assign delegated task to Alls                    | cripts, Internist  | ▼ Task Priority :        | Routine                  | •               |
| Result Document                                  |  | Sh                       | ow verified results ir   | Result Document |
| C None C Incomplete : <                          | Choose an incomplete N                                   | ote. >>                  |                          | -               |
| New:      Result Note     To/CC     Enabled bas  | FoS; Family Medicine; Alls                               | ence                     |                          |                 |
| Message to Staff                                 |  | Message to Patien        | t                        |                 |
| Text renders in the Tas<br>Message section of No | sk and TT<br>vte   | Text rende<br>Discussior | rs in<br>/Summary of Let | ter             |
| Append Staff Message to                          | Task Comment<br>Auto-c<br>sults Being VerifiedPreference | hecked based on<br>ence  | Results                  |                 |
| Text renders on the re-                          | sult itself under the tes                                | t name                   |                          |                 |
|  | Verify & Go To No  | Verify & Next            | Patient Verify           | Cancel          |



#### **Provider Verifying Results Workflow**

Select Patient 🔻 🛔 🛕

|   | Tas  | k l  | .ist                   |                  |                     |                     |                  |   |
|---|------|------|------------------------|------------------|---------------------|---------------------|------------------|---|
|   | View | r: 🚺 | ly Active Tasks        | ▼ View Desc      |                     |                     |                  |   |
| l | P ≑  | D    | † Task                 |                  | Assigned To         | Created By          | Created On       | ¢ |
| l | Δ    |      | Verify Patient Results | Allscripts,Fiona | Allscripts,Provider | Allscripts,Provider | 10/23/2013 11:41 |   |

| ¢                |          |                    |         |        |               |       |
|------------------|----------|--------------------|---------|--------|---------------|-------|
| Age: bu rears    | Allergi  | es: <sub>NKA</sub> |         | otner: | 10009         | _     |
| • 🛛 🛄            |          |                    |         |        |               |       |
| • 2 • 如 铊        | 19 🗸 🕥   | Commit             | Pat Loc |        | <b>▼</b>   \$ | tatus |
| Allergies        | Immuns   | Encounter          |         |        |               |       |
| llscripts, Fiona |          | ▼ < ▶ 6            | 3 🖬 🗹   | Y      |               |       |
|                  |          |                    |         |        |               |       |
| cation           |          |                    |         |        |               |       |
| se All           | scripts, | Provider           |         |        | 230ct201      |       |

| ResultsVerificationDialog   | an & Same Street a             | a Chatta Ala            |                              |
|---|--------------------------------|-------------------------|------------------------------|
| [R] Allscripts, Fiona 60 YO F DO  | B: 10Mar1953                   |                         | Chart Update 10/9/2013       |
| Patient Communications  |                                |                         |                              |
| Call Pt with Results  |                                |                         |                              |
| Schedule Results F/U  |                                |                         | TT                           |
| Mail Results To Patient   |                                |                         |                              |
| Discussed results with patient<br>No patient communication nee<br>Order Provider calls patient wi | ded at this time<br>th results |                         |                              |
| Assign delegated task to Allscrip   | ts, Provider 🔹                 | Task Priority : Routine | -                            |
| Result Document   |                                | Show verified           | d results in Result Document |
|   | oose an incomplete Not         | • >>                    |                              |
| To/CC<br>Messages   | and oo, ranny meurone          | , Cilsonpis, Fridvidel  |                              |
| Message to Staff  |                                | Message to Patient      |                              |
|   | TT                             |                         |                              |
| Append Staff Message to Tas   | k Comment                      |                         |                              |
| Annotations to Apply to All Result  | s Being Verified               |                         |                              |
|   |                                |                         |                              |
|   |                                |                         |                              |
|   | Verify & Go To Note            | Verify & Next Patient   | Verify Cancel                |

| □ - 圖   ◇ - ℡ - 聰 - 乙 -           | , ng ka ta ta ta | Commit   Pat Lo | -             | ▼ Sta      | atus |
|-----------------------------------|------------------|-----------------|---------------|------------|------|
| Patient Worklist Problem Al       | lergies Immuns   | Encounter       |               |            |      |
| Order-Result Managem 🔻 Allscripts | , Fiona 🔻        | < > Ø 🖪         | 0 7           |            |      |
| 1 Items : 12 Active Patient Tasks |                  |                 |               |            |      |
| Resulted - Requires Verification  |                  |                 |               |            |      |
| Er 🛗 💾 Blood Glucose              | Allscripts, P    | rovider         |               | 230ct2013  | 08:  |
| Test                              | Result           | Flag H          | Reference     |            |      |
| Glucose Finger Stick              | 178 mg/dl        | A               |               |            |      |
|                                   |                  |                 | Deview        | _          |      |
|                                   |                  |                 | Review        |            |      |
|                                   |                  |                 | Review All    |            |      |
|                                   |                  |                 | QVerify       |            |      |
|                                   |                  |                 | QVerify All   |            |      |
|                                   |                  |                 | Verify        |            |      |
|                                   |                  |                 | Verify All    |            |      |
|                                   |                  |                 | Order         | _          |      |
|                                   |                  |                 | Remove        | _          |      |
|                                   |                  |                 | Enter in Erro | or Results |      |
|                                   |                  |                 |               |            |      |



#### Verifying Another Provider/Resident's Results Workflow

| Task List  |   |                                  |  |  |  |
|--|---|----------------------------------|--|--|--|
| View: Order-Result Group Coverage View Desc  |   |                                  |  |  |  |
| P D Task Patient Assigned To   | Created By  |                                  |  |  |  |
|  | Worklist Desktop View 🗸 😥 🛄   |                                  |  |  |  |
|  | 🕒 🕶 🖉 👻 🕶 🌚 😨 🕈 🕲 🛍 🛍 🗑 Commit   Pat Loc                                    | ▼ Status                         |  |  |  |
|  | Patient Worklist Problem Allergies Immuns Encounter                         |                                  |  |  |  |
| Results Verification Dialog  | Order-Result Group Cov 🔻 Allscripts, Fiona 🔹 🖣 🖗 📓 🖉                        | Y 🖉 🕨                            |  |  |  |
| Patient Communications     The second s | Order-Result Management ChartView Abnormal Results Mication                 |                                  |  |  |  |
| Call Privati Results     TT  | Order-Result Group Coverage Allscripts, Provider F                          | inal 23Oct2013 09:46PM           |  |  |  |
| Mail Results to Vatient     Discussed results with patient     No patient communication needed at this time     Order Provider calls natient with results  | V Requiring Supervision<br>Test Result Flag Reference<br>Hemoglobin A1C 5.5 | ence                             |  |  |  |
| Assign delegated task to Allscripts Provider   Task Priority: Routine  |   |                                  |  |  |  |
| Result Document  |   |                                  |  |  |  |
| None C Incomplete:  < Choose an incomplete Note. >>     To: CO     New:      Results Document FoS; Family Medicine; Allscripts, Provider      To: CO   | L   |                                  |  |  |  |
| Messages Message to Staff Message to Staff   |   | Review                           |  |  |  |
|  |   | Review All                       |  |  |  |
|  |   | QVerify<br>OVerify All           |  |  |  |
| Π  |   | Verify                           |  |  |  |
|  | Warning   | Verify All                       |  |  |  |
| Verify & Go To Note Verify & Next Patient Verify Cancel  |   | Order                            |  |  |  |
|  | You are about to verify results for an item that you did not order.         | Remove<br>Enter in Error Results |  |  |  |
|  |   | Update Provider                  |  |  |  |
|  | OK Cancel   |                                  |  |  |  |



R.

×

OK Cancel

•

2 🕨

▼ Status

Note Signature

Sig Type:

User Name: twresiden Password

Make Final

Status: Needs Input

Overdue: 06 Nov 2013 3:29 PM

OK Cancel

Priority: Routine

- 🖉 🛄 🗛

Note Problem ChartViewer Encounter Meds/Orders Allergies HMP

Message Much improved, repeat in 3 months

Recompile Sign Copy Forward Sec

Signatures

\* Allergies \* Verified Results \* Discussion/Summar ☆ Message \* Signatures

🖳 🗸 🗿 🗸 🌮 🛪 🖓 🗸 🖉 🛍 📽 🐨 🍘 🛛 Commit | Pat Loc

TW Result Note 👻 🞯 🗃 🛛 Allscripts, Residents 🔹 🕮

#### **Resident Verifying Results Workflow**

😕 Task Detail -- Webpage Dialog Task Details

1 Not about a patient 2 Concerning patient [R] Test,Candy Assign To: 
User Team Task: Co-Sign Note

Aliscopts.Internist 
Ali Priority: Routine 
Status: Active

Task Filters

Comment:

Text Templates... Activate: 30 Oct 2013 4:29 PM

Delegate

Note

Current Meds

Allergies Verified Results Discussion/Summary Message Signatures

Result Note

Result Letter

View

Create Notify Task When: Complete Overdue Notify: Allscripts,Residents · All

| Active Tasks   | ▼ View Desc                   |  |  |  |
|--|-------------------------------|--|--|--|
| Task<br>Verify Patient Results   | Patient     Allscripts Figure | + Assigned To  | Created By     Allscripts Provider   |  |
|  |                               |  |  |  |
| ct Patient  i  |                               | Allergies: <sub>NKA</sub>  | otner: Two   | 009  |
|  | ▼外▼嗣 龍 智                      | Commit Pa  | tLoc   | ▼ Status   |
|  |                               |  |  |  |
| Patient Worklist Probler   | n Allergies Im                | muns Encounter   |  | 699.   |
| der-Kesult Managem   | Aliscripts, Fiona             | • • • 69   |  | <u> </u>   |
| Resulted - Requires Verif  | fication                      |  |  |  |
| 📄 🔛 🔛 Blood Gluce  | ose Allscr                    | ipts, Provider   |  | Oct2013 08:45PM  |
| Test   | Result                        | Flag   | g Reference  |  |
| Glucose Finger St  | tick 178 mg/                  | dl A   |  |  |
| _  |                               |  |  |  |
| Review   | -                             |  |  |  |
| D : AU   |                               |  |  |  |
| Keview All   |                               |  |  |  |
| OVerify  |                               | Results  | ItsVerificationDialog  | 1953 Cl  |
| QVerify<br>QVerify   |                               | Resu<br>(R) Alli<br>Patien   | ItsVerificationDialog<br>scripts, Fiona 60 YO F DOB: 10Mar<br>t Communications   | 1953 CI  |
| QVerify<br>QVerify All<br>Verify   | I .                           | ₽ Resu<br>Rain<br>Patien<br>Ca<br>Sco  | ItsVerificationDialog<br>scripts, Fiona 60 YO F DOB: 10Mar<br>Communications<br>II Pt with Results<br>hedule Results F/U   | 1953 CI  |
| QVerify<br>QVerify All<br>Verify   |                               | Resultation Resultatio Resultation Resultation Resultation Resultation Resulta   | ItsVerificationDialog scripts, Fiona 60 YO F DOB: 10Mar t Communications II Pt with Results hedule Results F/U II Results To Patient   | 1963 Ci  |
| QVerify<br>QVerify All<br>Verify<br>Verify.All   |                               | Resultion of the second   | ItsVerificationDialog scripts, Fiona 60 YO F DOB; 10Mar Communications I P with Results hedule Results F/U II Results To Patient cussed results with patient patient communication needed at th  | 1963 Ci  |
| QVerify<br>QVerify All<br>Verify<br>Verify All<br>Order  |                               | Resauration Control Co   | ItsVerificationDialog scripts, Fiona 60 YO F DOB: 10Mar Communications IP with Results IP with Results IP with Results FIU IP with Results FIU UP with Palent communication needed at th patient communication methed at   | 1963 CI  |
| QVerify<br>QVerify All<br>Verify<br>Verify All<br>Order<br>Remove  |                               | Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa<br>Resa   | ItsVerificationDialog scripts, Fiona 60 YO F DOB: 10Mar Communications IF With Results F/U IF with Results F/U IF exist To Patient coursed results with patient patient communication needed at th are Provide task to Atlecrepts, Provid Denoment   | 1963 CI<br>is time<br>er J Task Priority : [Routine  |
| QVerify<br>QVerify All<br>Verify All<br>Verify All<br>Order<br>Remove<br>Enter in Error Results                    |                               | Result<br>(1) Alth<br>Patient<br>Sc<br>M Ma<br>Assign<br>Result<br>C No  | ItsVerificationDialog  textpts, froms 60 YO F DOBS 10Mat Communication Communication I Pt with Results Provide Results F/U  I Results F/U I Results F/U I Results F/U I Results F/U I Results F/U I Resul | 1963 CI<br>is time<br>er J Task Priority : Routine<br>J Show verified result<br>incomplete Note. >>  |
| Review All<br>QVerify<br>QVerify All<br>Verify All<br>Order<br>Remove<br>Enter in Error Results<br>Update Provider |                               | Resau<br>(1) All<br>Patiente<br>So<br>M Ma<br>Assign<br>Resaut<br>C No<br>C No<br>C No<br>C No   | ItsVerificationDialog  tertips, from 60 YO F DOBs 10Mat  tertips, from 60 YO F DOBs 10Mat  tertips, from 60 YO F DOBs 10Mat  tertips, from 70 You for the formation of the form tertips of the formation of the fo | 1953 CT<br>Is time<br>er  Task Priority : [Routine<br>Show verified result<br>incomplete Note. >><br>amily Medicine, Allscripts, Provider  |
| Review All<br>QVerify<br>QVerify All<br>Verify All<br>Order<br>Remove<br>Enter in Error Results<br>Update Provider |                               | Result<br>Patient<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>Call<br>C | ItsVerificationDialog  tertips, from 60 YO F DOBS 10Mat  tertips, from 60 YO F DOBS 10Mat  tertips, from 60 YO F DOBS 10Mat  tertips, from 70 Your 10  | 1953 CT<br>1953 Source - Task Priority: [Routine<br>er  Task Priority: [Routine<br>@ Show verified result<br>incomplete Note. >><br>amily Medicine, Allscripts, Provider<br>Message to Patient   |
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### **Results Communication**

| Tasl  | k L | ist                       |                   |                      |                      |                  |        |
|-------|-----|---------------------------|-------------------|----------------------|----------------------|------------------|--------|
| View: | F   | tesults Communication     | ✓ View Desc Show: | 25 🔻                 |                      |                  |        |
| P 💠   | D   | 🗢 Task                    | Patient           | Assigned To          | Created By           | Created On       | Status |
|       | Υ   | Schedule Results F/Up     | Test,Sharon       | Allscripts,Residents | Allscripts,Residents | 10/31/2013 10:05 | Active |
|       | Υ   | Schedule Results F/Up     | Test,Test         | Allscripts,Residents | Allscripts,Residents | 10/31/2013 10:09 | Active |
|       | Y   | Call Patient with results | Test,Candy        | Allscripts,Internist | Allscripts,Residents | 10/28/2013 12:38 | Active |
|       | Υ   | Call Patient with results | Test,Candy        | Allscripts,Internist | Allscripts,Residents | 10/28/2013 12:38 | Active |
|       | Υ   | Call Patient with results | Test,Gary         | Allscripts,Residents | Allscripts,Residents | 10/30/2013 05:12 | Active |
|       | Υ   | Call Patient with results | Test,Test         | Allscripts,Residents | Allscripts,Residents | 10/31/2013 10:09 | Active |

| 🖳 Note Viewer   |  |                        |  |  |  |
|---|--|------------------------|--|--|--|
| Test, Candy 29 YO F DOB: 0  | 9Aug1984                               | Chart Update 10/28/201 |  |  |  |
| TW Result Note - Owner  | r: Allscripts,Residents Status: Final  | O Previous Next        |  |  |  |
| D ;   |  |                        |  |  |  |
|   |  |                        |  |  |  |
| Result Note   |  |                        |  |  |  |
| Verified Results<br>Glucose Fasting   | 280 ct2013 11:39AM Allscripts, Interni | ist                    |  |  |  |
| Test Name   | Result Flag Reference                  |                        |  |  |  |
| Glucose Fasting   | 90 mg/dl                               |                        |  |  |  |
| Blood Culture   | 230 ct2013 04:34PM Allscripts, Interni | ist                    |  |  |  |
| Test Name   | Result Flag Reference                  | ,                      |  |  |  |
| Blood Culture   | 75                                     |                        |  |  |  |
| Discussion/Summary<br>cxvfdxv<br>xzcxz<br>Message<br>dfd<br>Signatures              |  |                        |  |  |  |
| Electronically signed by : Residents Allscripts, ; UCt 28 2013 12/41PM ES1 (Author) |  |                        |  |  |  |
| Existing Appotations:   | New Appotati                           | 00                     |  |  |  |
| Oct 31 2013 10:18AM Allscripts,<br>called pt and they were not hor                  | ClinicalStaff A                        |                        |  |  |  |



### **Summary**

Today we've demonstrated the various aspects that need to be reviewed and considered for a successful Results Verification Roll-out including:

 Configuration Preferences, Worklist, Task List, Dictionary and Note Type review, User set-up, and Security





#### **Questions?**

- Submit questions to <u>education@galenhealthcare.com</u>
- Visit <u>http://galenhealthcare.com/calendar/</u> for future webcasts
- Presentation slides and complete Q&A will be posted at <a href="http://wiki.galenhealthcare.com/results\_verification">http://wiki.galenhealthcare.com/results\_verification</a>



# Thank you for joining us today, for additional assistance...

#### You can contact us through our website at

#### www.galenhealthcare.com

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| VitalCenter™<br>Using Patent Pending technology,<br>VitalCenter™ is a client-server application |   | Executive Team<br>Careers<br><u>Contact Us</u> |  |