

Worklist

Reviewing the types of worklists, functionality, and customization

Empowering Extraordinary Patient Care

Today's presenters:

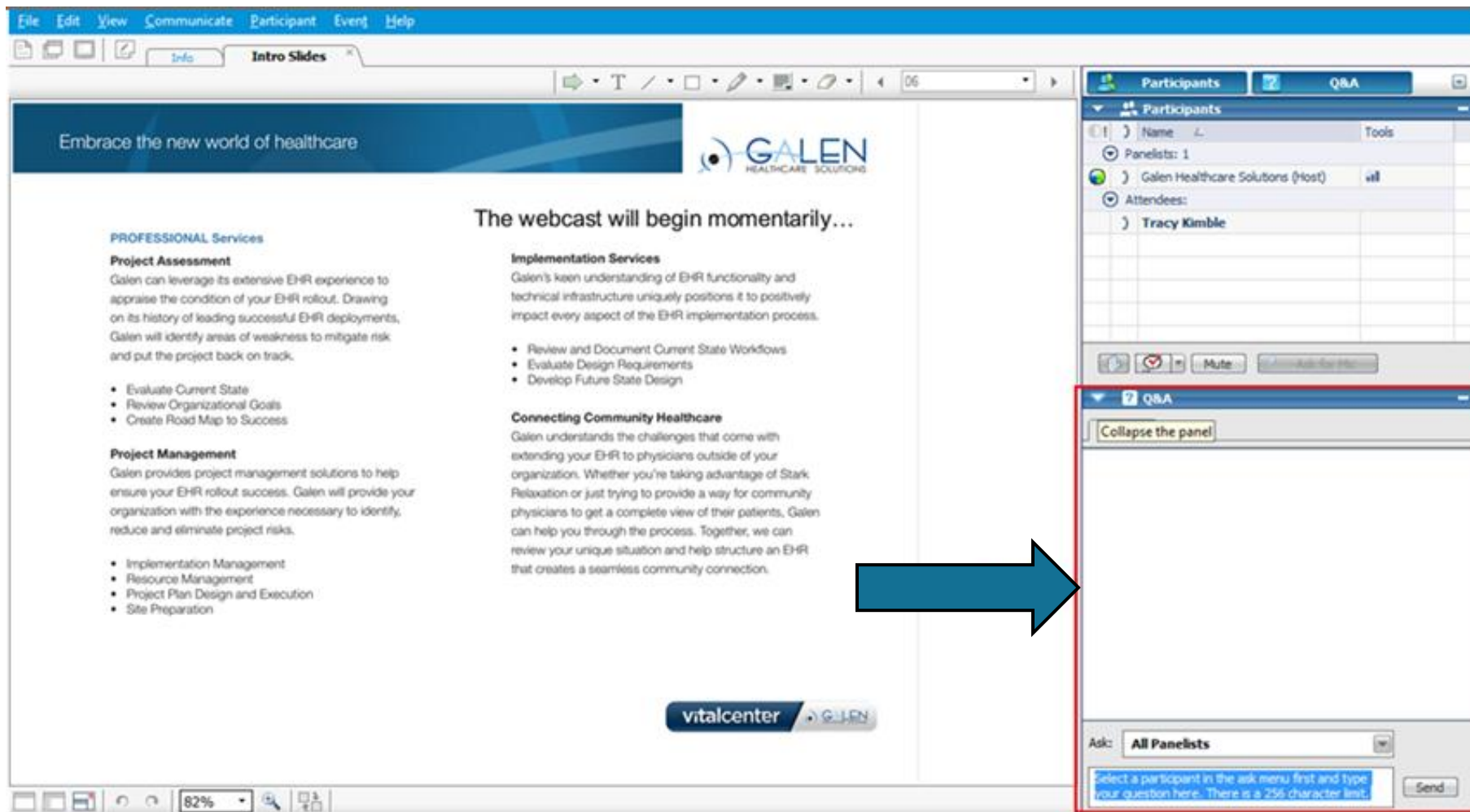


Dana McDonough
Associate Consultant
Galen Healthcare Solutions



Katie McDonough
Consultant
Galen Healthcare Solutions

Your phone has been automatically muted. Submit questions here during the webcast



The screenshot displays a webcast interface. The main content area shows a presentation slide with the title "Embrace the new world of healthcare" and the Galen Healthcare Solutions logo. The slide content is divided into three sections: "PROFESSIONAL Services", "Implementation Services", and "Connecting Community Healthcare". A large blue arrow points from the slide content to the Q&A panel on the right.

PROFESSIONAL Services

Project Assessment

Galen can leverage its extensive EHR experience to appraise the condition of your EHR rollout. Drawing on its history of leading successful EHR deployments, Galen will identify areas of weakness to mitigate risk and put the project back on track.

- Evaluate Current State
- Review Organizational Goals
- Create Road Map to Success

Project Management

Galen provides project management solutions to help ensure your EHR rollout success. Galen will provide your organization with the experience necessary to identify, reduce and eliminate project risks.

- Implementation Management
- Resource Management
- Project Plan Design and Execution
- Site Preparation

Implementation Services

Galen's keen understanding of EHR functionality and technical infrastructure uniquely positions it to positively impact every aspect of the EHR implementation process.

- Review and Document Current State Workflows
- Evaluate Design Requirements
- Develop Future State Design

Connecting Community Healthcare

Galen understands the challenges that come with extending your EHR to physicians outside of your organization. Whether you're taking advantage of Stark Relaxation or just trying to provide a way for community physicians to get a complete view of their patients, Galen can help you through the process. Together, we can review your unique situation and help structure an EHR that creates a seamless community connection.

Participants

Name	Tools
Panelists: 1	
Galen Healthcare Solutions (Host)	all
Attendees:	
Tracy Kimble	

Q&A

Collapse the panel

Ask: All Panelists

Select a participant in the ask menu first and type your question here. There is a 256 character limit.

Send













What will we cover today?

- Define the Worklist
- Distinguish between the two types of worklists
- Review the delivered Worklists & common customized Worklists
- Identify all build items that control Worklist functionality & display
- Review how to setup a Worklist
- Demonstrate basic functionality of a Worklist
- Review actions performed within each type of Worklist



What is a Worklist?

- a workspace containing order and result items
- most commonly used to see items that need an action performed before they can be completed
 - e.g., items in a state/reason of needs information or needs verification/authorization

Problem Encounter Patient Worklist Health Management Plan			
Results Management		Morris, Julie	       
1 Items : 1 Active Patient Tasks			
Resulted - Requires Verification			
   	CBC	Canton, Elizabeth	Final 07Oct2010 09:56AM
<div> <div>Test</div> <div>Result</div> <div>Flag</div> <div>Reference</div> </div>			
<div> <div>[19Dec2012 04:31PM Bones, Jeff]</div> <div>flagged wbc for review</div> </div>			
WBC	123 K/mm3	A	
RBC	456		

Two Types of Worklists



Patient-Centric

- A list of order or result-related items that apply to one specific patient
- An individual component of the Clinical Desktop

Cross-Patient

- A list of order or result-related items that apply to multiple patients.
- This workspace is located in the vertical/horizontal toolbars.

Clinical Desktop | MAR (V11) | Worklist | Note | eCalcs | Referral Documents | Note Viewer

Morris, Julie | Sex: F | Age: 42 Years | MRN: 040102140111293 | Directives: W Phone: Security: No Restricted Data | Allergies: Unknown | FYI: FYI | Note: Select

My Adult Patient View

Dictation: Office New Pt L3 | Ready | 0/0s

Patient Worklist

Results Management | Morris, Julie

1 Items : 1 Active Patient Tasks

Resulted - Requires Verification

Test	Result	Flag	Reference
[19Dec2012 04:31PM Bones, Jeff] flagged wbc for review			
WBC	123 K/mm3	A	
RBC	456		

Health Maintenance (V70.0)

* CBC Status: Resulted - Requires Verification Done: 07Oct2010 09:56AM

Chart Viewer | Health Management Plan

All by Section by Sub-Section | None

15 of 42 Chart Items (21 Invalid and 5 Audit Items)

Notes

Office Notes

View | Edit | New | Print | Clinical Exchange Document

Patient-Centric

Task List Documents Manage My Views Add / Edit My Views Note **Worklist** Printing Tasks

Morris, Julie Sex: F MRN: 040102140111293 Directives: Allergies: Unknown
 Age: 42 Years W Phone: FYI: FYI
 DOB: 05/29/1970 H Phone: Security: No Restricted Data Note: Select

Order and Result Manag Patient Name

Dictation Office New Pt L3 Ready 0/0s

Patient Name	Location	Status	L/S Last U	Oldest Item
2222, Patient				06Feb2013 ...
Abbott, Susan				20Sep2010 ...
Baca, Deborah				25Jan2012 ...
Chart, Sample				10Sep2010 ...
Fitzgerald, George				08Jul2006 ...
Imagelink, Test				18May2010 ...
Jones, Myrtle				09Jun2006 ...
Jones, Robert				03Jan2006 ...
Morris, Julie				19Dec2012 ...
Murray, Lila				06Jul2006 ...
Paterson, Stella				20Jul2012 ...
Reese, Paula				16Jan2005 ...
Smith, Joe				23May2007 ...
Smith, Rose				26Aug2012 ...
Smith, Susan				23May2007 ...

Resulted - Requires Verification

Test	Result	Flag	Reference
[19Dec2012 04:31PM Bones, Jeff] flagged wbc for review			
WBC	123 K/mm3	A	
RBC	456		

View Void Authorize Completed Today Completed On Order D/C Enter in Error Cancelled Verify Edit Update Provider Print Results Annotate

Cross-Patient

How are Tasks different from Worklist Items?

Task

- allow for up to 4 filters
- may or may not pertain to an order or result
- assigned to an owner
- follow up with any remaining Task List items after checking worklist

Worklist

- provide 18 filter tab types
 - a query builder around Orderable Items
 - linked to a specific order or result
 - assigned to a view to be worked by one or more users
 - check the Worklist first
- a task can be a reminder that a Worklist item exists, but the inverse is not true
 - May pertain to orders/results

Provider

- Order-Result Management
- Order-Result Group Coverage
- Abnormal results
- Denied Financial Auth Order

Midlevel & Resident

- Order-Result Group coverage
- Abnormal Results
- RV Requiring Supervision

Delivered Enterprise Views

Clinical Staff

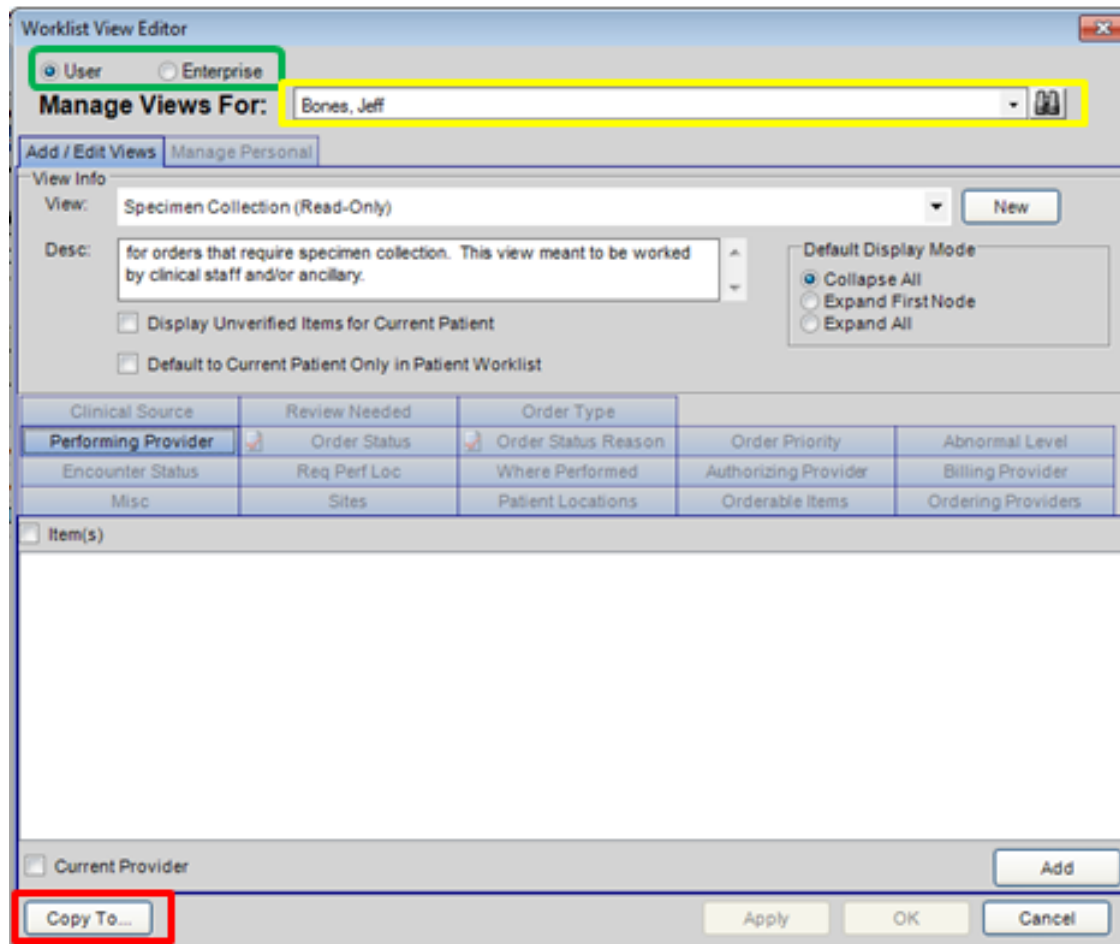
- Overdue Orders
- Orders Requiring FU
- Meds/Immun Requiring Attention
- Specimen Collection

Front Desk/Clerical Staff

- Orders Requiring FU
- Financial Auth

Worklist View Editor Layout: Controls

The **Worklist View Editor** window that opens when you select the  icon on the Worklist tab




- **User/Enterprise**
- **Manage Views For:**
- **‘Copy To...’**
- **Apply, Ok, Cancel**

Worklist View Editor Layout: Add/Edit Views tab

Worklist View Editor

☒ User ☐ Enterprise

Manage Views For: 

Add / Edit Views **Manage Personal**

View Info

View:




Desc:

☐ Display Unverified Items for Current Patient

☐ Default to Current Patient Only in Patient Worklist




Default Display Mode

☒ Collapse All
☐ Expand FirstNode
☐ Expand All

Clinical Source	Review Needed	 Order Type		
Performing Provider	 Order Status	 Order Status Reason	Order Priority	Abnormal Level
Encounter Status	Req Perf Loc	Where Performed	Authorizing Provider	Billing Provider
Misc	Sites	Patient Locations	Orderable Items	Ordering Providers

- **Display Unverified Items for Current Patient**
- **Default to Current Patient Only in Patient Worklist**
- **Default Display Mode radio buttons**

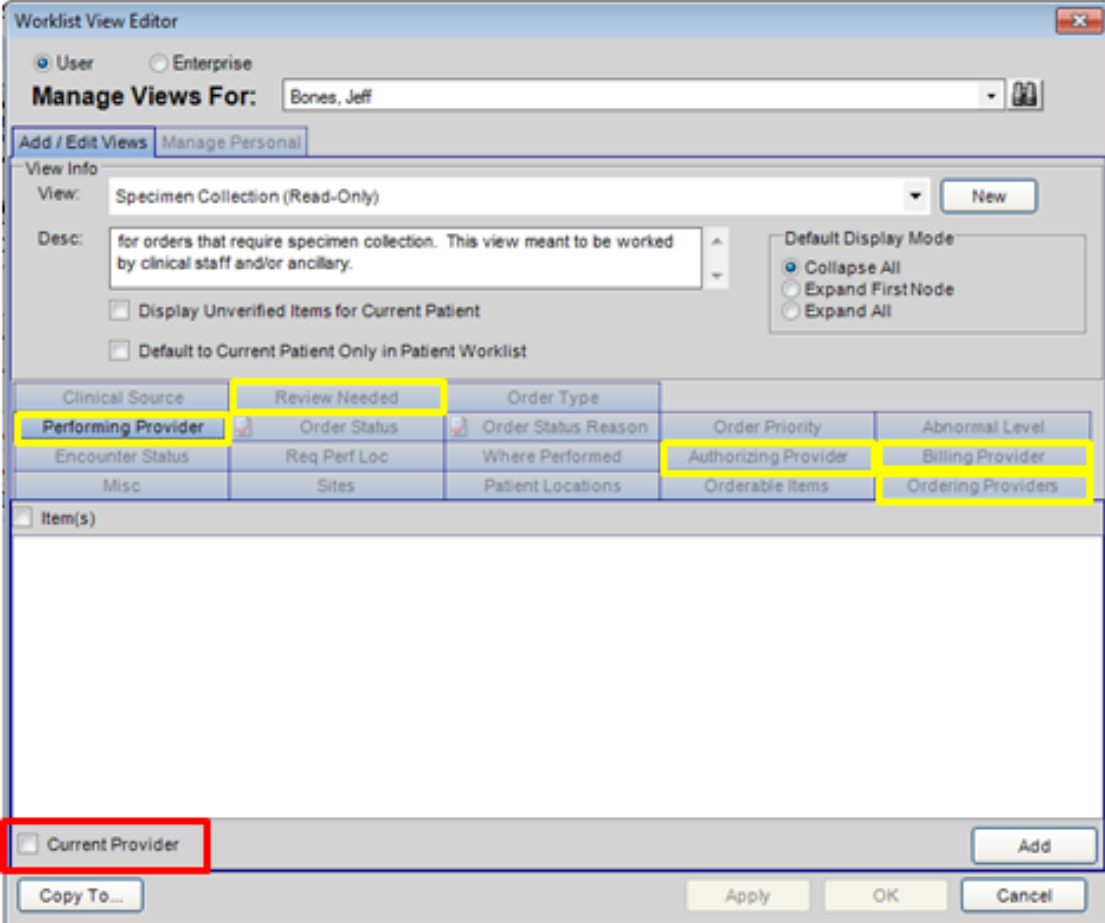
Worklist Viewer Layout: Filters

Clinical Source	Review Needed	 Order Type		
Performing Provider	 Order Status	 Order Status Reason	Order Priority	Abnormal Level
Encounter Status	Req Perf Loc	Where Performed	Authorizing Provider	Billing Provider
Misc	Sites	Patient Locations	Orderable Items	Ordering Providers

- **Choosing the right filter drives how you sort your ‘bucket’ of orders and results**
- **18 available filters**
- **customize a view specific to your role**
 - optimize your daily workflow
- **Users are not required to utilize every filter**

Notable Filters: Filters containing ‘current provider’ checkbox

- 5 filters include a “current provider” checkbox
- Example: the view will show items for which the current provider was the performing provider, authorizing provider, etc.



Worklist View Editor

☒ User ☐ Enterprise

Manage Views For: Bones, Jeff

Add / Edit Views Manage Personal

View Info

View: Specimen Collection (Read-Only) [New]

Desc: for orders that require specimen collection. This view meant to be worked by clinical staff and/or ancillary.

☐ Display Unverified Items for Current Patient

☐ Default to Current Patient Only in Patient Worklist

Default Display Mode

☒ Collapse All
☐ Expand First Node
☐ Expand All

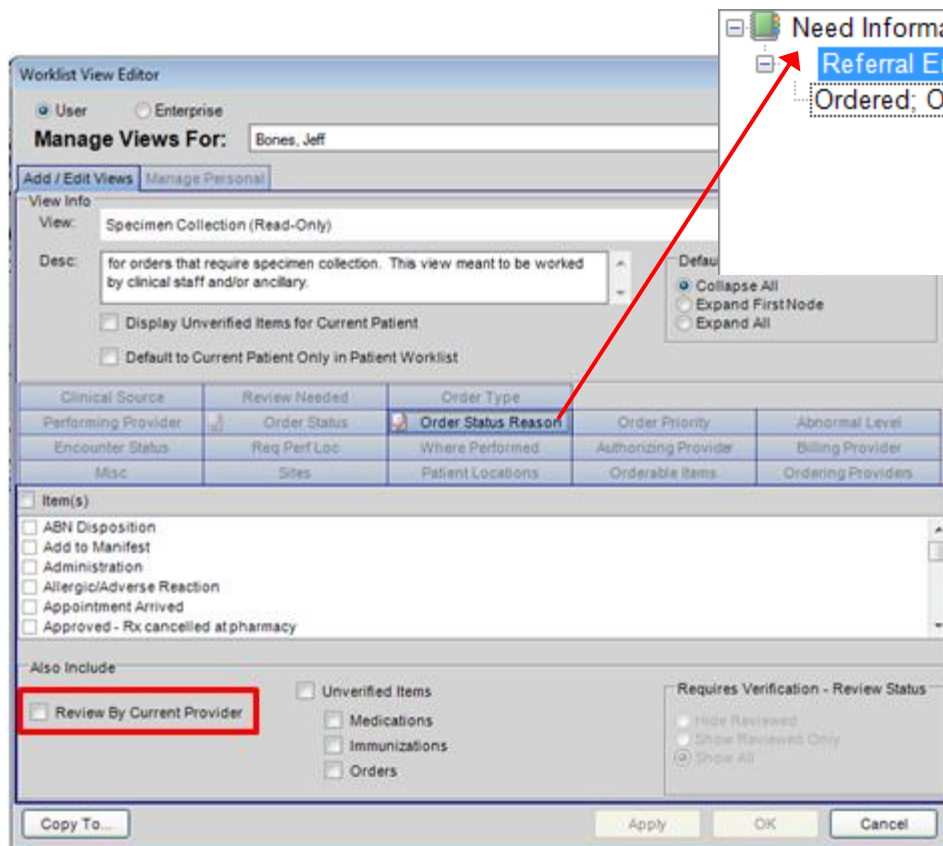
Clinical Source	Review Needed	Order Type	Order Priority	Abnormal Level
Performing Provider	Order Status	Order Status Reason	Authorizing Provider	Billing Provider
Encounter Status	Req Perf Loc	Where Performed	Orderable Items	Ordering Providers
Misc	Sites	Patient Locations		

☐ Item(s)

☒ Current Provider [Add]

[Copy To...] [Apply] [OK] [Cancel]

Notable Filters: Order Status Reason

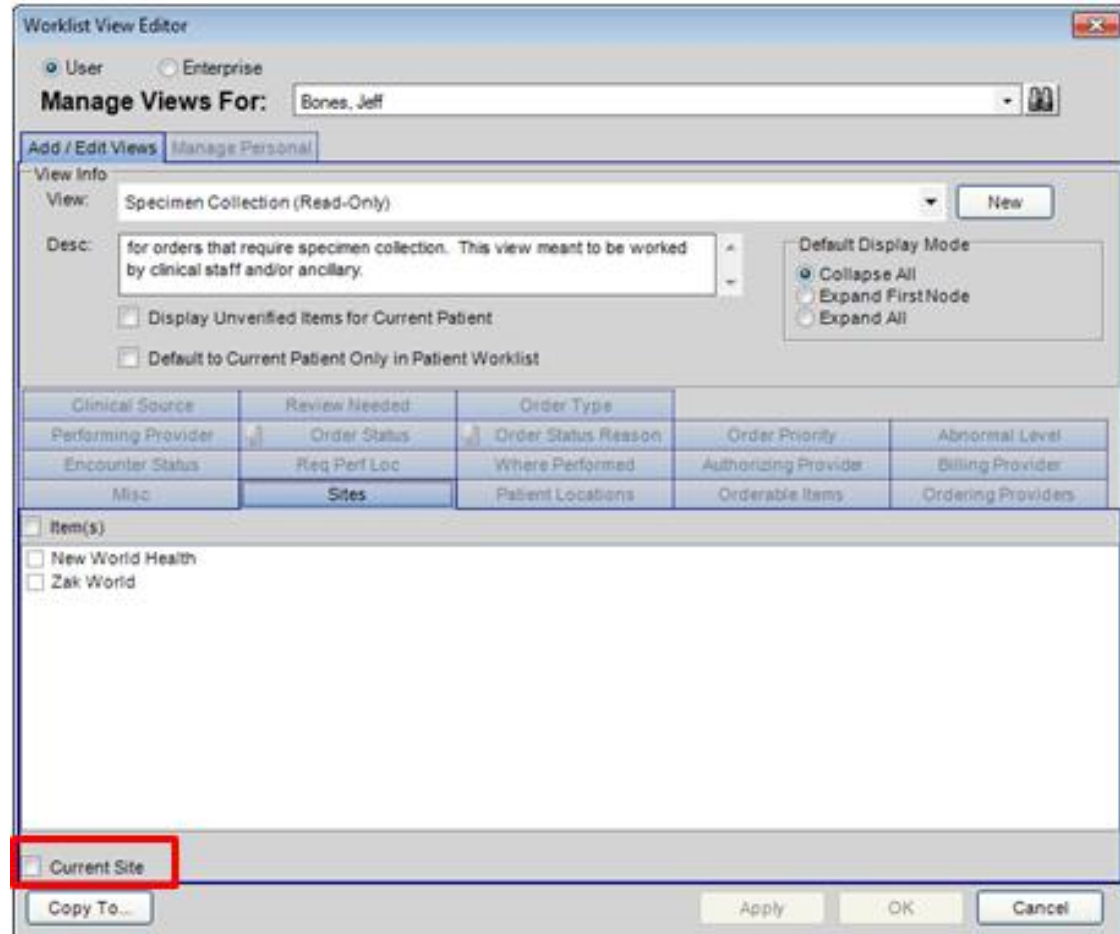


The screenshot shows the 'Worklist View Editor' window. The 'Manage Views For:' field is set to 'Bones, Jeff'. The 'View Info' section shows 'View: Specimen Collection (Read-Only)' and 'Desc: for orders that require specimen collection. This view meant to be worked by clinical staff and/or ancillary.' The 'Order Status Reason' filter is highlighted in the 'Order Type' column. A red arrow points from this filter to a callout box containing the text: 'Referral Emergency Room; 14Sep2012; Status: Need Information; Bones, Jeff Ordered; Ordered By: Bones, Jeff Performed: Due: 24Sep2012'. The 'Also Include' section has the 'Review By Current Provider' checkbox checked and highlighted with a red box. Other checkboxes include 'Unverified Items', 'Medications', 'Immunizations', and 'Orders'. The 'Requires Verification - Review Status' section has 'Show Reviewed Only' selected.

- “Review by Current Provider” checkbox
- include items that require review
- Also, include certain unverified items

Notable Filters: Sites

- “Current Site” checkbox
- If a site is not selected, then the view does not filter based on this item



Worklist View Editor

☒ User ☐ Enterprise

Manage Views For: Bones, Jeff

Add / Edit Views Manage Personal

View Info

View: Specimen Collection (Read-Only) [New]

Desc: for orders that require specimen collection. This view meant to be worked by clinical staff and/or ancillary.

☐ Display Unverified Items for Current Patient

☐ Default to Current Patient Only in Patient Worklist

Default Display Mode

☒ Collapse All

☐ Expand First Node

☐ Expand All

Clinical Source	Review Needed	Order Type		
Performing Provider	Order Status	Order Status Reason	Order Priority	Abnormal Level
Encounter Status	Req Perf Loc	Where Performed	Authorizing Provider	Billing Provider
Misc	Sites	Patient Locations	Orderable Items	Ordering Providers

☐ Item(s)

☐ New World Health

☐ Zak World

☐ Current Site

Copy To... Apply OK Cancel

Notable Filters: Misc

- Display Items in Current Organization Only
- Display Overdue Important Only
- Days Overdue
- Days to be Done
- Days to Expire
- Patient Waiting N Minutes
- Miscellaneous Sort does not function before v11.2.3 hf 3



The screenshot shows the 'Miscellaneous Filters' dialog box. The 'Misc' tab is selected. The 'Miscellaneous Filters' section contains the following options:

- ☐ Display Items in Current Organization Only
- ☐ Display Over-Due Important Only
- Days Overdue: 0 ☐ Beyond ☐ Within (The 'Beyond' radio button is circled in red)
- Days to be Done: 0 ☐ Beyond ☐ Within
- Days to be Expire: 0 ☐ Beyond ☐ Within
- Patient Waiting N Minutes: 0

The 'Miscellaneous Sort' section contains:

- Patient Name:
- ☒ ASC ☐ DESC

Buttons at the bottom: Copy To..., Apply, OK, Cancel.

Creating an enterprise view

- Worklist View – Edit security
- Worklist View – Administration
- TWAdmin> Work Def Admin > Worklist tab> Worklist View Editor window



Recommended Worklists by Role

Provider

Order-Result Management
Order-result Management-
Group Coverage

Clinical Staff

Clinical Staff Items
In House Orders

Front Desk

Check Out Items
Financial Auth Orders
Denied Financial Auth Orders

Surgery Scheduler
Surgery Scheduling

Office Manager

Overdue Orders
Outstanding Orders
Financial Auth Orders
Denied Financial Auth Orders

Scenario One

- An OBGYN practice orders different radiology and labs for their patients but only wants to track the patient's Mammograms. At the end of every month, the manager receives a report of all Mammograms that have been ordered. She then calls the patients to follow up on the status of their Mammogram. She would like a way to track these in the EHR.

Now let's go into the application!



Scenario Two

- A hospital has three affiliated practices. The scheduler at the hospital schedules all referral appointments for the three associated practices. He needs a Worklist view that displays all of the referral orders on hold for scheduling that were placed at these three practices.

Now let's go into the application!



Scenario Three

The organization would like Worklists setup by role to be used during the patient visit.

- **Create a In-house Orders Worklist which will hold all in-house lab procedure orders that need to be worked by the clinical staff during the visit.**
 - In House Orders – Active status, but Commun Method = Perform Order
- **Create a Check Out Worklist which will hold all orders that need to be worked by the staff at check out**
 - Follow-up and Imaging Orders on Hold for Scheduling

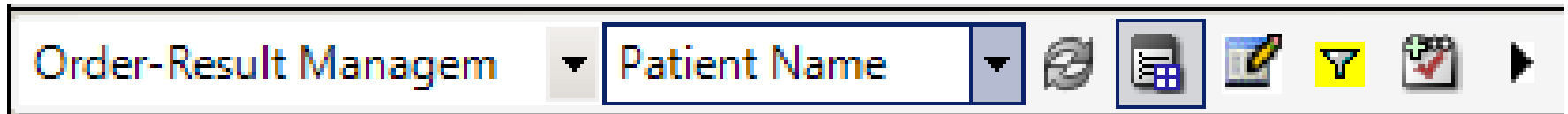
Now let's go into the application!



Manage Personal/Manage Enterprise tab

- **This radio button determines how this tab renders**
 - ‘Manage Enterprise’
 - ‘Manage Personal’
- **The current user can assign enterprise views as personal**
 - also allows them to set default view
- **Use SSMT to upload Worklist views & assign to specific users**

Cross-Patient Worklist Controls



- **View**
- **Sort**
 - Enables you to sort by Patient Name, Location, Status, L/S Last Updated & Oldest Item Updated
- **Refresh Icon**
- **Expand Icon**
 - Expands/contracts all data items within component
- **Edit View Icon**
- **Filter**
- **New Task Icon**

Things to Remember When Setting Up Your Worklist

Preferences

- Encounter selection worklist
encounter type worklist
- Maximum number of seconds to
allow for worklist load
- Workspace view task
- Worklist Navigation After
Authorize or Void
- Hide the grid header from result
display in worklist
- Result Verification Navigate
After Review
- Result Verification Navigation
after QVerify

Security

- Worklist View – Edit
- Worklist View
Administration

Overview

- **A worklist is a workspace containing order and result items**
- **There are two types of worklists**
 - Cross-patient & patient-centric
- **Worklists and tasklists are not the same thing**
- **You can create new worklist views in the Worklist View Editor**
 - These views can be assigned in the Worklist View Editor & through SSMT
- **Choosing the right filter drives how you sort your ‘bucket’ of orders and results**

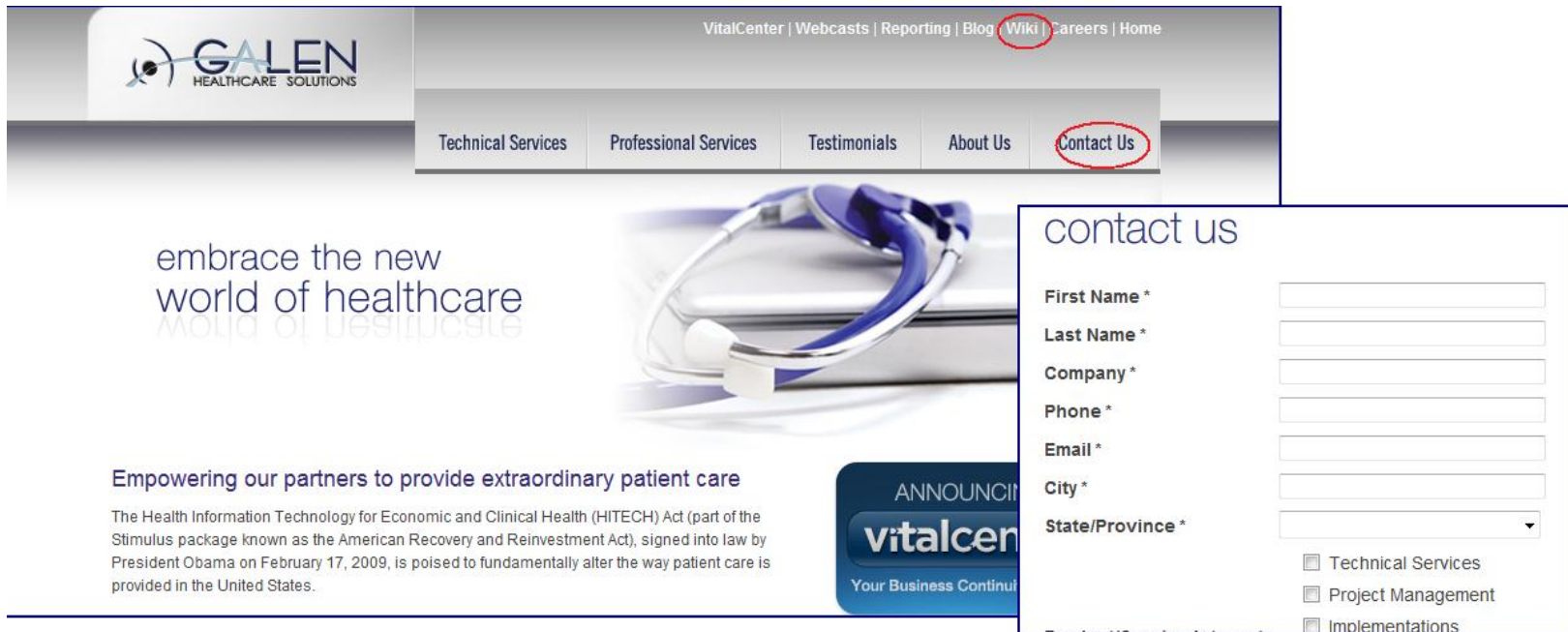
Q & A



<http://wiki.galenhealthcare.com/Webcasts>

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

You can contact us through our website at
www.galenhealthcare.com



The screenshot shows the Galen Healthcare Solutions website. The header includes the company logo and navigation links: VitalCenter | Webcasts | Reporting | Blog | **Wiki** | Careers | Home. A secondary navigation bar contains: Technical Services | Professional Services | Testimonials | About Us | **Contact Us**. The main content area features the slogan "embrace the new world of healthcare" with a stethoscope image. Below this is a section titled "Empowering our partners to provide extraordinary patient care" with text about the HITECH Act. A "vitalcenter" logo is also present. On the right, a "contact us" form is displayed with the following fields: First Name *, Last Name *, Company *, Phone *, Email *, City *, and State/Province *. Below these fields are three checkboxes: Technical Services, Project Management, and Implementations.

VitalCenter | Webcasts | Reporting | Blog | **Wiki** | Careers | Home

Technical Services | Professional Services | Testimonials | About Us | **Contact Us**

embrace the new world of healthcare

Empowering our partners to provide extraordinary patient care

The Health Information Technology for Economic and Clinical Health (HITECH) Act (part of the Stimulus package known as the American Recovery and Reinvestment Act), signed into law by President Obama on February 17, 2009, is poised to fundamentally alter the way patient care is provided in the United States.

ANNOUNCING
vitalcenter
Your Business Continuity

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City *
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☐ Technical Services
☐ Project Management
☐ Implementations

Who We Are

ALIGN YOURSELF with an Allscripts favorite.

Galen Healthcare Solutions is a certified Platinum Plus Allscripts partner for EHR adoption — and for good reason. Our company has been involved in hundreds of successful EHR implementations, from 6 physician specialty practices to 7,000 physician networks. Imagine the insights and expertise that Galen would bring to your EHR program.

EXPERIENCE success at every level.

Whatever EHR stage you're in, Galen has the tools and resources to help you succeed. Our seasoned team of experts is skilled in all areas of EHR and can help you with everything from database building to project management and application development to HITECH completion.