

V11 EHR Webcast Series – Orders

Part 2 Building Orders

Advanced Order Features

Today's Presenters:



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EHR Consultant with Galen Healthcare Solutions

- 10 years of software consulting, including 5 years of EHR experience
- Project manager, Implementation consultant, Orders specialist



Sue D'Agostino, RN

Clinical Consultant with Galen Healthcare Solutions

- Over 15 years in Healthcare including 5 years EHR experience
- Clinical consultant, Business/Clinical Analyst

Education Path for Orders

1. **Building Orders - Basics**
2. **Advanced Order features**
3. **Managing multiple vendors and Orderable Item Synchronization**

The Version & Release seen in today's Webinar

11.2.3 HF 1

Remember... submit questions at any point during the webcast in the Q&A panel

Today's Objectives

1. **Orderable Item Life cycle**
2. **Explore dictionaries that feed into the OID**
3. **Financial Authorization**
4. **Scheduling Workflow**
5. **Site Restrictions (new to v11.2)**

Orderable Item Lifecycle

- **Found in the ADBR**
- **Provides a map of the many status an Order can obtain before being resulted and completed**
- **[Order Status] – [Order Status Reason]**
- **Needs Information → Hold For → Active**

Order Life Cycle



Phase 1 - Creation



- **Upon being placed in EHR, the order is in the 'Creation' phase**
 - ~ If all required data is entered at the time of ordering, orders can proceed unhindered
 - ~ Think of 'Creation' as the phase in which the test is being qualified for actually becoming a viable order
- **The Order can be prevented by**
 - ~ Failing to receive Supervising Provider's Authorization
 - ~ Financial Auth denial
 - ~ Being 'Deferred' or 'Voided'

Phase 2 - Execution



- **The 'Execution'**
 - ~ Order has been successfully placed
 - ~ Some information might still be gathered
 - ~ The order is transmitted, performed and resulted
- **Hold For – More information needed before performing the Order**
 - ~ Scheduling
 - ~ Specimen collection
 - ~ Effective Date
- **Active – Order is ready to be fulfilled**
- **Resulted –**
 - ~ Performing Location has returned results
 - ~ If Verification is required, the order is in a 'Resulted – Verification Required' status

Phase 3 - Termination



- **Termination**
 - ~ The Order has been Resulted (and Verified if appropriate)
- **Order can also terminate without results**
 - ~ Expire
 - ~ Discontinued

1. OID Information managed by Supporting Dictionaries

- **Item Modifier**
- **Answers**
- **Additional Information (AOE)**
- **Resultable Item (RID)**
- **Clinical Source & Specimen Type**
- **Requested Performing Location (RPL)**
- **Order Status Reason**
- **Communication Methods**

Financial Authorization

How does it work?

- **Delivered functionality enables an Orderable item to process thru Financial Authorization process**
- **Prior to going to 'Active' status, Order goes to status of 'Needs Information – Financial Auth'**
- **Delivered worklists are configured to filter the orders in this status until they are completed or terminated**
- **If Financial Auth is obtained, setting the Financial Auth to 'Approved' will progress the order to the next status in the lifecycle**

Financial Auth - Configuring

- **Can be set manually at the time of placing the order**
- **Can only be set to default via SSMT**
 - ~ Category: Order Defaults – OID – Insurance
 - ~ Column value to trigger the Fin Auth: *Needed*
- **Financial Auth found in the Additional Details section of the Order Details**
- **To get the order past ‘Needs Info – Financial Auth Required’ status, the field must be updated to one of these statuses**

Complete

Temporary Deferral

Permanent Deferral

Canceled

EIE

Scheduling Workflow

How does it work?

- **When orders are configured to be Scheduled, a simple workflow gets triggered upon order**
- **Rather than going to a status of Active, the order goes into a status of “*Hold For – Scheduling*”**
- **Worklists are ideal for managing this process**

Scheduling Workflow

Configuring the Order

- **Only configured to default via SSMT**
 - ~ Category: “Order Defaults – OID – Performing Location /Site”
 - ~ [Category? Column?]
- **The configuration can be manually overridden to update, cancel, or complete the workflow**

Site Restrictions

What is it?

- **Allows specific Orderable items or entire classes to be available for ordering based on the Site the user is logged into**

Why?

- **The key benefit is focusing specialized tests on the sites that need them, reducing the unnecessary tests other providers will not need**

Site Restrictions

How is it configured?

- **In .Net Preferences/Orders, verify that the .Net Preferences called 'Enable Orderable Item Selection by Site Filtering' is set to 'Y'**
 - ~ If this is 'N', the option won't be available to configure
- **In the Orderable Item Dictionary, select either an Item or a Classification**
 - ~ Scroll down to the 'Order Mapping' section
 - ~ Click the 'Site Restrictions' link
 - ~ In the window presented, select the Site or Sites that NEED this Item or Classification and

Site Restrictions

- Scroll down to the ‘Order Mapping’ section
- Click ‘Site Restrictions’

Dictionary: Orderable Item

Code	Name	Mnemonic
Endocrin	Endocrinology	
7000332	I 11-Deoxycortisol	11DEOXY
9000040	I Adrenocorticotrophic Hormone	ACTH
5000123	I AFP-Triple Screen	AFP-TS
7200026	I Aldosterone	ALDOS
7000349	I Androstenedione	ANDRO
7000551	I Antidiuretic Hormone Panel	ADH
1002450	I C-Peptide	CPEP

Order Mapping

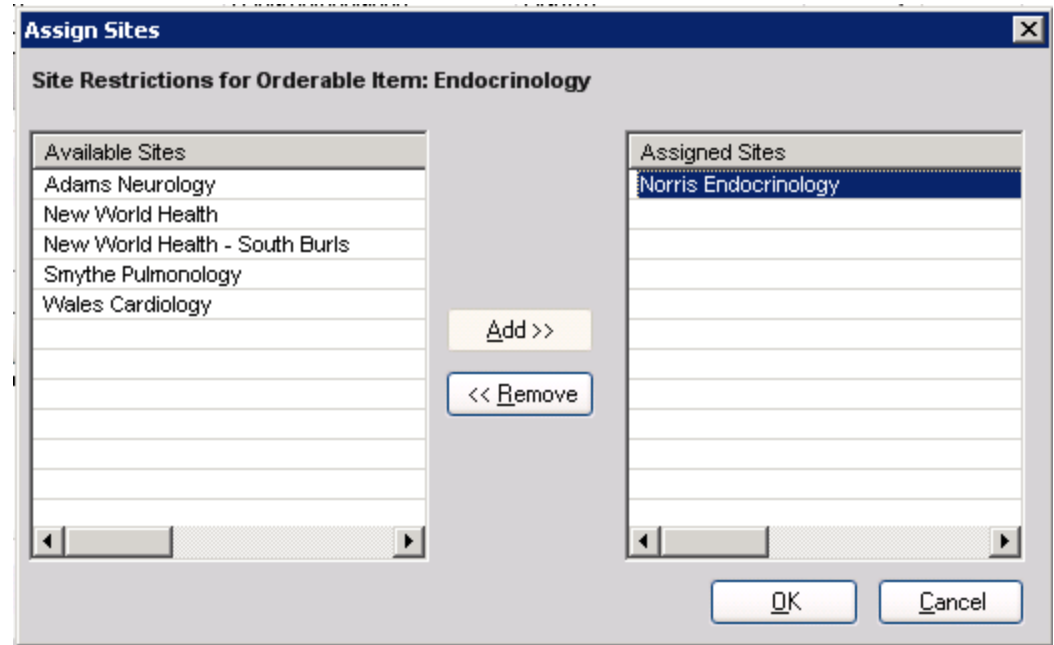
[Site Restrictions](#)

Linked Site Restrictions:

Code	Name	Mnemonic
There are no items to show in this view		

Site Restrictions

- Choose the Site(s) that will need access to this chosen Item or Class
- Add them to the 'Assigned Sites'
- Click 'OK'



Questions

At this time we will review the questions submitted prior to and during the webinar.

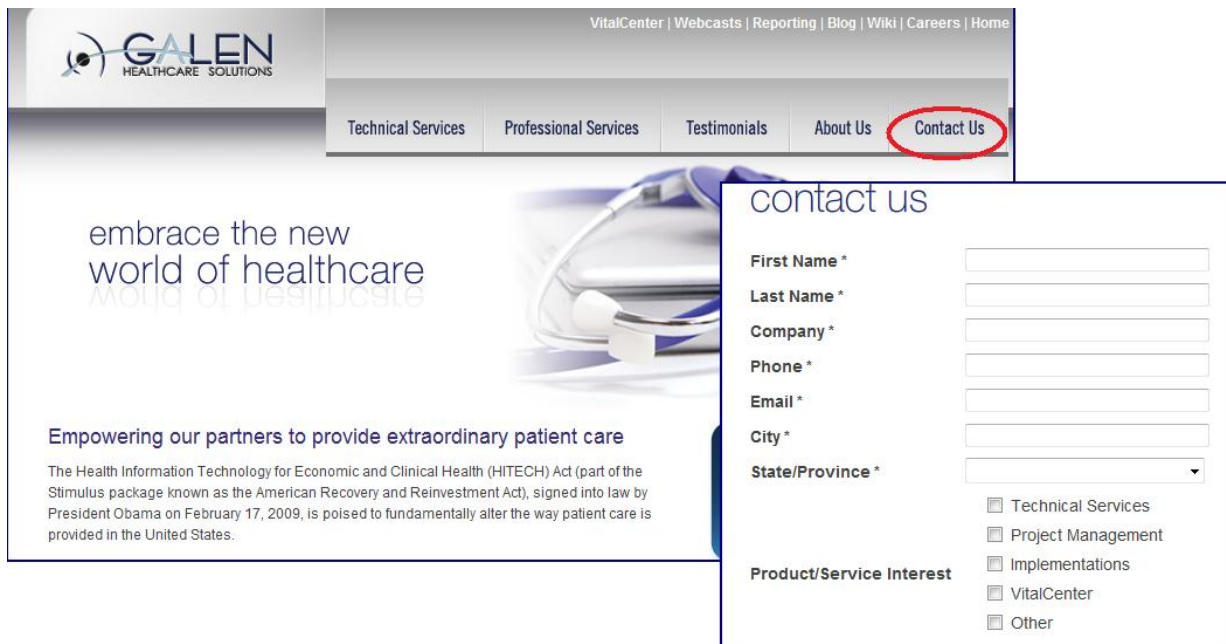
Next webinar

**Orders webinar Part 3 –
Managing multiple lab vendors
in EHR v11
April 27, 2012 2PM**

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- We will post responses to all related questions submitted during the webcast on the Galen wiki: <http://wiki.galenhealthcare.com/webcasts/>

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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.

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