



Orders Technical Implementation Guide

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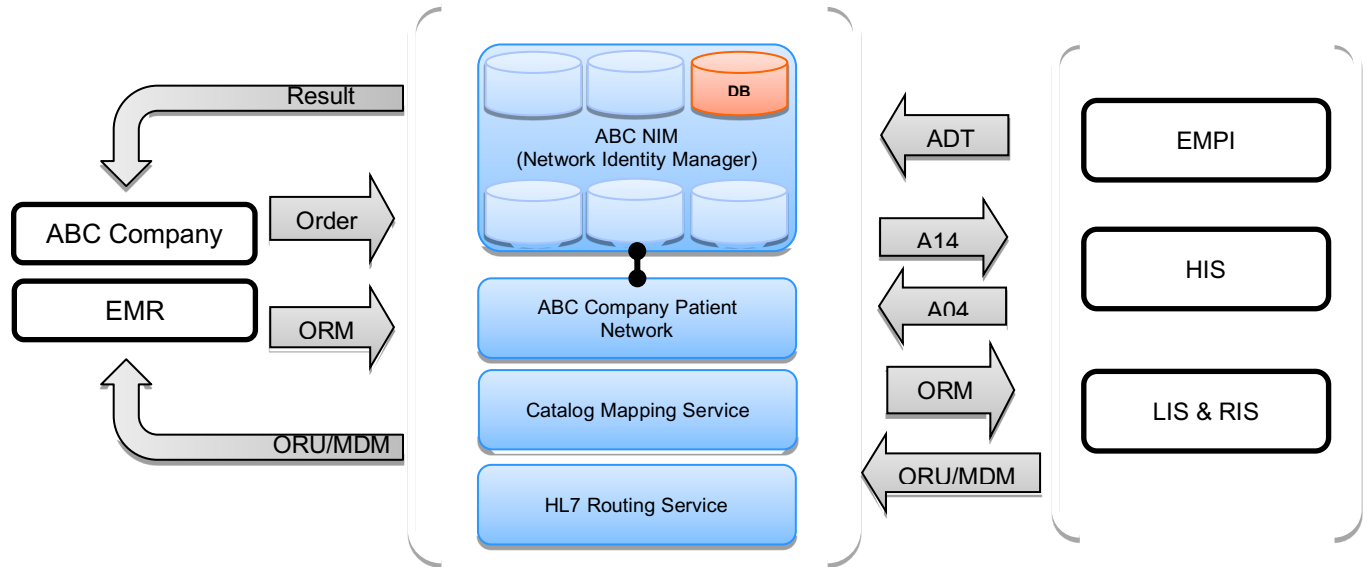
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1. Introduction and Overview

This document provides detailed technical implementation information for Hospitals and Health Systems deploying ABC Company's Connected Orders service. It also serves as a reference guide to assist Hospitals and Health Systems in evaluating the Connected Orders service prior to purchase. This document specifies installation and configuration requirements, HL7 message flows, and detailed field-level requirements. Where these requirements and a hospital's or health system's capabilities do not match, ABC Company Professional Services should be contact for further options.

2. How the Messages Flow

The following diagram illustrates Connected Orders service, consisting of the elements detailed below.



- ABC Company maintains a mirror of a partner's patient population via a real-time ADT feed from the partner's eMPI and HIS.
- ABC Company maintains a Master Orderable Catalog to which partner lab and radiology catalogs are mapped.
- Ordering physicians can create an electronic order in ABC Company and receive the corresponding result in ABC Company's Result Manager
- Connected Orders can also be supported with an EMR. Details of this functionality are available separately.
- ABC Company can request an account number for a known patient or a new patient record and account number, when necessary, from the HIS via an exchange of A14 (pending admit) and A04 (register patient) HL7 messages.
- ABC Company sends orders and accepts order status update messages from a Health System's order receiving facilities.

3. Cloverleaf® Secure Courier (CSC) Client Requirements

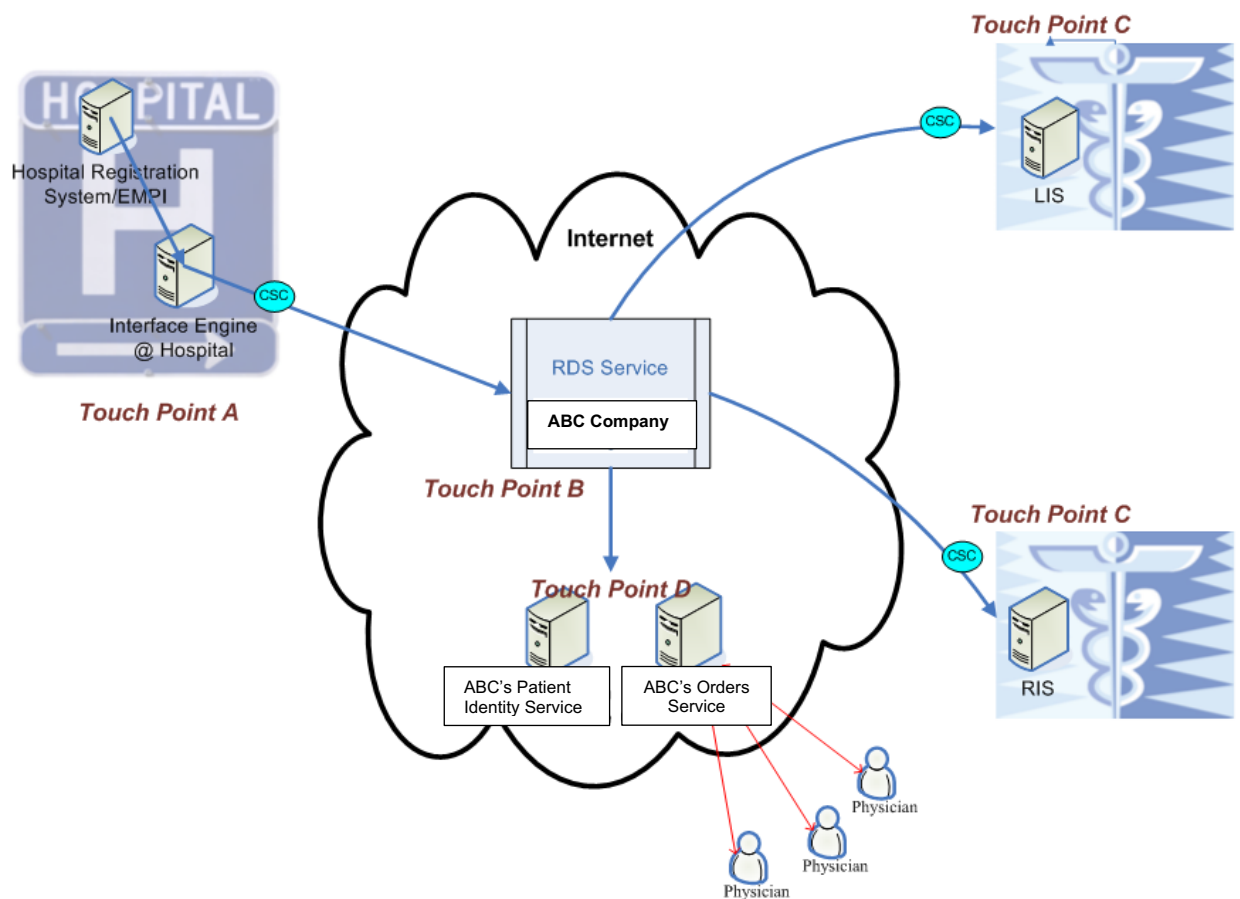
3.1. Introduction

For connectivity purposes, ABC Company requires partners to install CSC Client to send and receive messages for the Connected Orders service. This section contains information about the Cloverleaf® Secure Courier (CSC) Client product.

CSC Client is a Health Vision Product to allow connectivity between enterprises via the Internet. It is a non-intrusive, and cost-effective way for real-time secure exchange of electronic clinical information (i.e., laboratory and radiology orders) with ABC Company's CSC Server. It offers ongoing monitoring and maintenance of each connection.

3.2. How CSC Works

The following diagram indicates CSC touch points:



4. Master Orderable Catalog Upload

ABC Company will maintain a Master Orderable Catalog, which will be used at the time of creating orders. External systems or receiving facilities may not understand ABC Company orderable. Therefore, in order to send orders, a partner specific catalog must be mapped to ABC Company's master catalog. Partner-specific orderable will be used on outbound orders. In the absence of partner-specific orderable, ABC Company Master Catalog will be used on the outbound orders. ABC Company will maintain the mappings. If there are additional orderable to be added or updated, partner must provide an updated file. ABC Company also supports incremental updates and will maintain a history of all catalog uploads.

4.1. File Format

Partner will need to provide ABC Company with lab and radiology orderable in Microsoft Excel format. ABC Company can provide an Excel file template to be populated (sample below). Up to 5000 orderable can be uploaded per file.

ABC Company Orderable Identifier	ABC Company Orderable Name	Partner Orderable Name	Partner Orderable Identifier	Laterality	AOE Script Name	Specimen Container Instruction	Specimen Storage Instruction	IsDeleted

4.2. Field Descriptions and Requirements

Field Name	Description	Comments	Max Length	Is Required?
ABC Company Orderable Identifier	ABC Company Master Catalog identifier	ABC Company will complete this information		Yes <i>Partner does not need to provide this information</i>
ABC Company Orderable Name	ABC Company Master Catalog name	ABC Company will fill this information		Yes <i>Partner does not need to provide this information</i>
Partner Orderable Name	Partner Orderable/Catalog name	Will be used in the outbound orders	255	Yes
ABC Company Orderable Identifier	Partner Orderable/Catalog identifier	Will be used in the outbound orders	50	Yes
Laterality	Laterality	Possible values are: 1-Left, 2-Right, 3-Bilateral		No
AOE Script Name	At order entry, name of the AOE to be asked at the time order creation.	Before uploading this file, AOE script must be uploaded into the ABC Company system.	40	No
Specimen Storage	Specimen Storage Instruction	Instruction for the ordering provider regarding the specimen	255	No

5. Asked at Order Entry (AOE) Upload

Certain orderable require additional information to be captured and communicated to the lab. The Partner Orderable Catalog will indicate if an orderable requires additional information. If an orderable requires additional information, the Partner Orderable Catalog will indicate which questionnaire to expose to the user. These questionnaires are referred to as "Asked at Order Entry" (AOE) questions. Each lab's AOE for a given orderable may vary and this must be accounted for in the database. This section describes the known AOE questionnaires, and how they manifest themselves in the UI.

5.1. Known AOE

There are nine known AOE at this time:

1. Amniotic Fluid AFP (code: AFAPF)
2. Fasting Flag (code: FASTIN)
3. Blood Lead (code: LCMBLD)
4. Maternal Screen Only (code: MSONLY)
5. Maternal Screen with NT (code: MSSNT)
6. GYN Cytology (code: PAP)
7. Serum Integrated AFP (code: SERIN)
8. Source (code: SOURCE)
9. Total Volume (code: TOTVOL)

Please refer to the *Appendix A* in this document for field descriptions and segment requirements of the nine pre-populated AOE. Additionally, Appendix A includes a sample template for a new AOE.

5.2. AOE in Orders Workflow

Once an orderable is added to an order AND a facility has been chosen, the system will check to see if there is an associated AOE. If there is an AOE, user will be asked to answer the questions. The response will be sent as part of the outbound orders based on the AOE.

6. Network Identity Management (Real-time ADT Feed)

6.1. Introduction

ABC Company's Connected Orders service allows providers to send lab and/or radiology procedures to a hospital system for order/result processing. As a processing system typically requires than an inbound ORM include a account/visit number before it can be processed, ABC Company has configured a workflow of standard HL7 messages that triggers an account number be created by a hospital system's HIS and returned to ABC Company for inclusion in the ORM message.

In order to facilitate accurate patient identity matching, ABC Company will be maintaining a mirror of a partner's patient population, stored in our Network Identity Management solution, powered by Initiate. This patient population will be kept current by real-time ADT feeds from a partner's eMPI (where applicable) and HIS systems. A partner must enable a real-time ADT feed from all applicable systems.

6.2. ADT Message Types

The list below details which ADT message types are required and what action they will have on the Network Identity Management solution.

Message Type	Message Description	Action
ADT^A01	ADMIT/VISIT NOTIFICATION (EVENT A01)	Add/Update
ADT^A03	DISCHARGE/END VISIT (EVENT A03)	Add/Update
ADT^A04	REGISTER A PATIENT (EVENT A04)	Add/Update
ADT^A05	PRE-ADMIT A PATIENT (EVENT A05)	Add/Update
ADT^A08	UPDATE PATIENT INFORMATION (EVENT A08)	Add/Update Demographics
ADT^A11	CANCEL ADMIT / VISIT NOTIFICATION (EVENT A11)	Add/Update
ADT^A13	CANCEL DISCHARGE / END VISIT (EVENT A13)	Add/Update
ADT^A14	PENDING ADMIT (EVENT A14)	Add/Update
ADT^A23	DELETE A PATIENT RECORD (EVENT A23)	Add/Update
ADT^A24	LINK PATIENT INFORMATION (EVENT A24)	Link
ADT^A27	CANCEL PENDING ADMIT (EVENT A27)	Add/Update
ADT^A28	ADD PERSON OR PATIENT INFORMATION (EVENT A28)	Add/Update Demographics
ADT^A29	DELETE PERSON INFORMATION (EVENT A29)	Delete
ADT^A30	MERGE PERSON INFORMATION (EVENT A30)	Merge
ADT^A31	UPDATE PERSON INFORMATION (EVENT A31)	Add/Update Demographics
ADT^A37	UNLINK PATIENT INFORMATION (EVENT A37)	Unlink
ADT^A38	CANCEL PRE-ADMIT (EVENT A38)	Add/Update
ADT^A40	MERGE PATIENT - PATIENT IDENTIFIER LIST (EVENT A40)	Merge
ADT^A41	MERGE ACCOUNT - PATIENT ACCOUNT NUMBER (EVENT A41)	Merge
ADT^A42	MERGE VISIT - VISIT NUMBER (EVENT A42)	Merge
ADT^A43	MOVE PATIENT INFORMATION - PATIENT IDENTIFIER LIST (EVENT A43)	Move
ADT^A44	MOVE ACCOUNT INFORMATION - PATIENT ACCOUNT NUMBER (EVENT A44)	Move
ADT^A45	MOVE VISIT INFORMATION - VISIT NUMBER (EVENT A45)	Move
ADT^A47	CHANGE PATIENT IDENTIFIER LIST (EVENT A47)	Add/Update
ADT^A49	CHANGE PATIENT ACCOUNT NUMBER (EVENT A49)	Add/Update
ADT^A50	CHANGE VISIT NUMBER (EVENT A50)	Add/Update
ADT^A51	CHANGE ALTERNATE VISIT ID (EVENT A51)	Add/Update

7. Patient Registration Workflow

7.1. Introduction

This section describes the ability in real-time to automatically perform either an outpatient registration or pre-admit in a partner's HIS system, which allows an LIS/RIS to process orders (General Order Message: ORM) received from ABC Company (ABC).

In this environment, the health system organization has partnered with ABC Company to allow affiliated providers to send lab and/or radiology procedures to the hospital system for order/result processing. Patient registration does not occur in the HIS and the first time the HIS may be aware of the patient is upon receipt of the inbound A14 message. Typically for orders, the processing system requires that the account/visit number is received on the inbound ORM before it can be processed. The patient must be registered in the HIS and have an active account number.

7.2. HIS Requirements

The HIS requirements are as follows:

1. HIS will add a parameter in the Patient Type to activate real-time Auto Promote for the sending application, ABC Company in this case.
2. HIS will receive the A14 pending admission message from ABC Company via the HL7 v2.5 interface and will auto promote the admission based on the expected admit date, time, and patient type. If an Enterprise Patient Identifier is required, it will request an identifier from that system or route the A14 to the EMPI for the Master Patient identifier first, then the HIS.
3. HIS will perform a pre-admission when the expected admit date/time is in the future or register the patient when the expected admit date/time is current date.
4. HIS will generate a "Register Patient" (A04) or "Pre-Admit Patient" (A05) message and send the message outbound to ABC Company containing ABC Company's temporary account in PV1.50, which is the correlation identifier.
5. Lab and/or radiology systems will receive and process inbound orders from ABC Company in the ORM message once the HIS account number is sent.

8. Pending Admit Message (A14) from ABC Company to HIS

8.1. Description

The HIS will be receiving an inbound A14 HL7 v2.5 from ABC Company with a Patient Type in PV1.18 and expected admit date/time in PV2.8. In addition, a correlation identifier will be valued in PV1.50, which is to be resent in the outbound A04 or A05. The A14 accomplishes two tasks: 1) create patient identifiers, if necessary and 2) create an account number that can be used in the ORM message.

ABC Company will initially perform a lookup of the patient in the Network Identity Management (NIM) service. If a match is found, it will use the person identifier as well as its corresponding patient identifiers in the A14. These identifiers are kept up to date in real time with the partner through backend processing via ADT messages. If no match is found, it is the responsibility of the HIS to create new patient identifiers and to create and link to an Enterprise Master Patient Index (EMPI), if an MPI system is present.

The HIS will define a unique patient type to use for the Realtime Auto Promote sequence. More than one patient type may be defined based on user preferences. If the admit date/time is for the current date, the HIS will perform Realtime Auto Promote, register the patient, and assign an account number. When the expected admit date/time is in the future, the HIS will process a pre-admission.

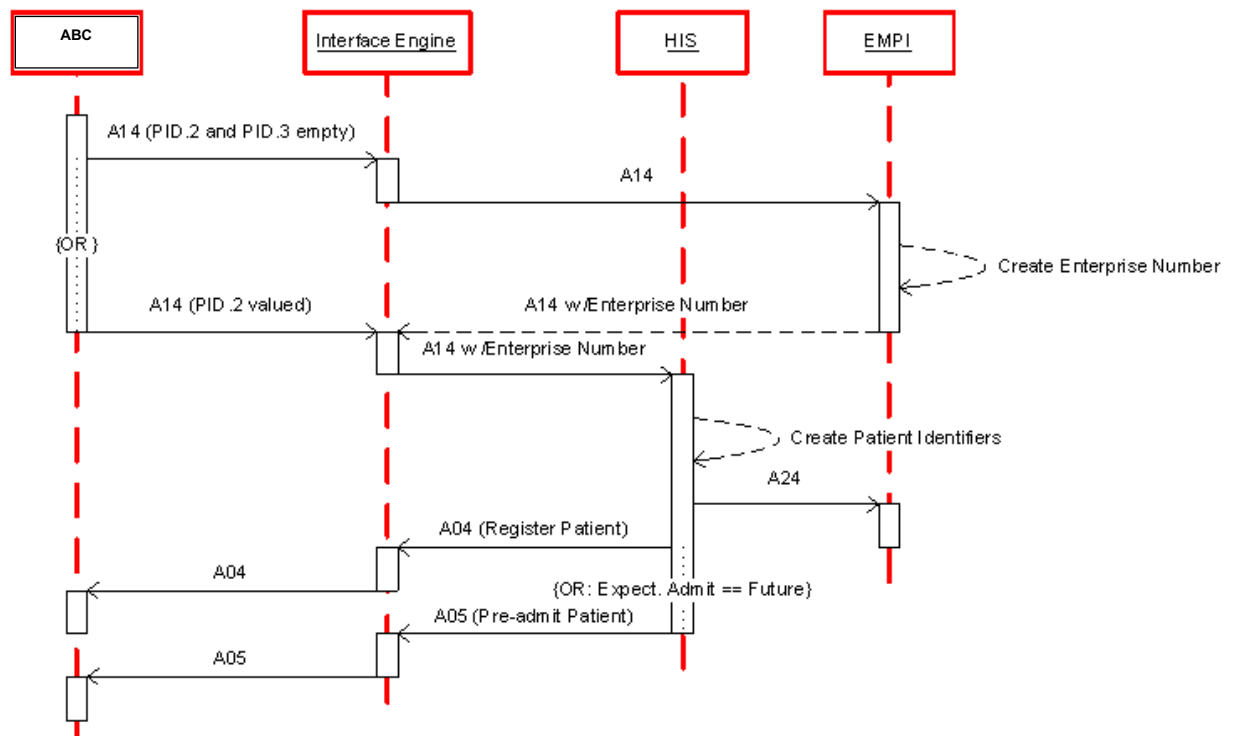


Figure 1: Creation of Identifiers

8.2. Requirements A14 – Pending Admit

ADT^A14 ADT Message

Segment	Name	Required
MSH	Message Header	Y
[{ SFT }]	Software Segment	
EVN	Event Type	Y
PID	Patient Identification	Y
[PD1]	Additional Demographics	
[{ ROL }]	Role	
[{ NK1 }]	Next of Kin / Associated Parties	
PV1	Patient Visit	Y
[PV2]	Patient Visit - Additional Info.	Y
[{ ROL }]	Role	
[{ DB1 }]	Disability Information	
[{ OBX }]	Observation/Result	
[{ AL1 }]	Allergy Information	
[{ DG1 }]	Diagnosis Information	
[DRG]	Diagnosis Related Group	
[{	--- PROCEDURE begin	
PR1	Procedures	
[{ ROL }]	Role	
}	--- PROCEDURE end	
[{ GT1 }]	Guarantor	
[{	--- INSURANCE begin	
IN1	Insurance	
[IN2]	Insurance Additional Info.	
[{ IN3 }]	Insurance Additional Info - Cert.	
[{ ROL }]	Role	
}	--- INSURANCE end	
[ACC]	Accident Information	
[UB1]	Universal Bill Information	
[UB2]	Universal Bill 92 Information	

8.3. Sample A14 from ABC Company

```

MSH|^~&|ABC|A|ST7|A|20090727174000||ADT^A14|5279|P|2.2
EVN|A14|20090727174000
PID|1|HNE794318566^^^NE^PE|T3304539^^^ABC^MRT ||DOE^TOM||19700608|F||19 NORTH
STREET^^SPARTANBURG^SC^29303^USA^H||(864)594-7655^PRN|^WPN||||626-80-5577|||||||N
PV1|1|P|^A|||8398^LAWRENCE^GRAHAM|||||||PRO|||||||S|||||||T3304539^^^ABC^ANT
PV2|||^TEST||||200907282230

```

The A14 pending admit message will contain the following segments: MSH, EVN, PID, PV1, PV2.

No guarantor information (GT1) will be sent in the A14 message.

No insurance information (IN1) will be sent in the A14 message.

Standard HL7 interface error processing will occur.

The following fields should be verified in the HL7.

9. ORM from ABC Company to Order Receiving System

9.1. Transmission

All orders that are delivered to a receiving facility are grouped by PlacerGroupNumber and orderable type. The number of ORM messages created is dependent on a configurable value “MaxOrdersPerGroup” that is specified by the partner receiving the ORM message. This value controls the maximum number of orders that can be grouped in one ORM message. If the value specified is 1 an order group with 3 orders will be generated in 3 different ORM message.

Example 1: MaxOrdersPerGroup = 5

Order Entry

- Lipid Panel (Laboratory type) Facility A
- Complete Blood Count (Laboratory type) Facility A
- Chest CT (Imaging type) Facility A

Orders Registration Manager

- Two order groups will be available to Facility A even the orders are submitted in one order entry.
- Laboratory types are grouped together, and Imaging type is on another order group.

Transmission

- One ORM message with details for Lipid Panel & Complete Blood Count order is transmitted and one ORM message with details for Chest CT order is also transmitted.

Example 2: MaxOrdersPerGroup = 1

Order Entry

- Lipid Panel (Laboratory type) Facility A
- Complete Blood Count (Laboratory type) Facility A
- Chest CT (Imaging type) Facility A

Orders Registration Manager

- Two order groups will be available to Facility A even the orders are submitted in one order entry.
- Laboratory types are grouped together, and Imaging type is on another order group.

Transmission

- One ORM message with details for Lipid Panel order is transmitted, one ORM message with details for Complete Blood Count order is transmitted, and one ORM message with details for Chest CT order is also transmitted.
- Three different ORM message are generated for one order entry.

9.2. Example ORM Messages

9.2.1. HL7 Version

The HL7 version where ORM messages are delivered is 2.5. Partner that expects different version of HL7 to be delivered should coordinate with the ABC Company's Professional Services department for the ORM messages to be delivered on a specific HL7 version format.

9.2.2. Imaging Type Order

Single order ORM

```
MSH|^~\&|SAP|ABC COMPANY|MRM|FACX|20090928121843||ORM^O01|11853|D|2.5
PID|1|ABC60007^^^PASSPORT^HNE^FACX|ABC60007^^^ST1^MR^FACX~ABC60007^^^PASS
PORT^HNE^FACX||OUTPATIENT1^TOM||19630325|F|||IGLOO 100^^NORTH
POLE^KY^45833||(419) 555-9876^PRN^PH||M^MARRIED||ABC60007
ORC|NW|431A07455111853^ABC||78D9294397A7496||||20090928121843|31232^SMITH^JOH
N||31232^SMITH^JOHN|FACX|7928378378^PRN^PH|""|^SPARTANBURG REGIONAL
HEALTH SYSTEM|||4|MRM^^^^^^^FACX||GOLF ROAD^^CHICAGO^IL^60610||
OBR|1|431A07455111853^ABC||2091^CHEST CT - LEFT|ROUTINE||||O||SEND WITH CC
PROVIDER||LEFT|31232^SMITH^JOHN|7928378378^PRN^PH||||||^ROUTINE|31232^SMI
TH^JOHN||||||20090928121800
DG1|1|I9|121.6^^ICD9
```

Multiple order ORM

```
MSH|^~\&|8500|ABC COMPANY|SWIVEL|8880|20091002142247||ORM^O01|12496|D|2.5
PID|1|HNE02^^^PASSPORT^HNE^8880|8880^MGHS^^5D849584-263F-487B-897C-
1CAC8A5B9BE3^^^ABC
COMPANY^EX~MRN02^^^ST1^MR^8880~HNE02^^^PASSPORT^HNE^8880||SWIVEL^PT||198
70101|M||^60610||(934) 032-9432^PRN^PH||U^UNKNOWN||ACC02
ORC|NW|614C301CCF12496^ABC||6727114D6117903||||20091002142247|MDSWIVEL^SWIV
EL^MEDICAL||MDSWIVEL^SWIVEL^MEDICAL|8880|7738882872^PRN^PH|""|SWIVEL^SWIVE
L CHAIR FLOW|||4|SWIVEL CHAIR PRACITCE^^^^^^8880|SWIVEL CHAIR PRACTICE
ADDRESS^^CHICAGO^IL|7928887772^PRN^PH|ROLL ROAD^^CHIAGO^IL^60610||
OBR|1|614C301CCF12496^ABC||SWIVEL 21^ULTRASOUND PELVIC SCAN -
SWIVEL|ROUTINE||||O||BILATERAL|MDSWIVEL^SWIVEL^MEDICAL|7738882872^PRN^PH||
||||^ROUTINE|||121.3^FASCIOLIASIS^ICD9||||20091002142200
DG1|1|I9|121.3^FASCIOLIASIS^ICD9
ORC|NW|A836B2A6D412497^ABC||6727114D6117903||||20091002142247|MDSWIVEL^SWIVE
L^MEDICAL||MDSWIVEL^SWIVEL^MEDICAL|8880|7738882872^PRN^PH|""|SWIVEL^SWIVEL
CHAIR FLOW|||4|SWIVEL CHAIR PRACITCE^^^^^^8880|SWIVEL CHAIR PRACTICE
ADDRESS^^CHICAGO^IL|7928887772^PRN^PH|ROLL ROAD^^CHIAGO^IL^60610||
OBR|2|A836B2A6D412497^ABC||SWIVEL 17^HEAD CT -
SWIVEL|ROUTINE||||O||LEFT|MDSWIVEL^SWIVEL^MEDICAL|7738882872^PRN^PH||||||^
^^ROUTINE|||121.4^FASCIOLOPSIASIS^ICD9||||20091002142200
DG1|2|I9|121.4^FASCIOLOPSIASIS^ICD9
```

9.2.3. Laboratory Type Order

Single order ORM

MSH|^~\&|SAP|ABC COMPANY|HLAB|ABC
COMPANY|20090930102705||ORM^O01|12371|D|2.5

PID|1|P12312312^^^PASSPORT^HNE^ABC COMPANY|P12312312^^^ABC
COMPANY^EX~P12312312^^^ST1^MR^ABC
COMPANY~P12312312^^^PASSPORT^HNE^ABC
COMPANY||SMITH^JASON||19850820|M||^60610||(383) 947-
3289^PRN^PH||S^SINGLE|E231231231

ORC|NW|A0FB409F4612371^ABC||0570B97F16E7809||||20090930102705|32^ADAIR^FRANK||
32^ADAIR^FRANK|ABC COMPANY|7034092889^PRN^PH|""|^SPARTANBURG REGIONAL
HEALTH SYSTEM||4|HLAB^^^^^^^^^ABC COMPANY|165 MARKET ST.^SAN
FRANCISCO^CA|415-963-9988^PRN^PH|GOLF ROAD^^CHICAGO^IL^60610||

OBR|1|A0FB409F4612371^ABC||4500^CULTURE, URINE|STAT||20090930130000||||O||NANCY
TEST2||L. KIDNEY FLUID&L. KIDNEY
FLUID|32^ADAIR^FRANK|7034092889^PRN^PH||||||^20090930130000^^STAT|15010^ABB
EY^ELLIOT~5234^MAUTZ^JENNIFER||234.8^CA IN SITU NEC^ICD9||||20090930102700
DG1|1|I9|234.8^CA IN SITU NEC^ICD9

Multiple order ORM

MSH|^~\&|8500|ABC COMPANY|SWIVEL|8880|20091002141706||ORM^O01|12492|D|2.5

PID|1|HNE02^^^PASSPORT^HNE^8880|8880^MGHS^^5D849584-263F-487B-897C-
1CAC8A5B9BE3^^^ABC
COMPANY^EX~MRN02^^^ST1^MR^8880~HNE02^^^PASSPORT^HNE^8880||SWIVEL^PT||198
70101|M||^60610||(934) 032-9432^PRN^PH||U^UNKNOWN||ACC02

ORC|NW|A47FD69F4F12492^ABC||6EE7F83A4657900||||20091002141706|MDSWIVEL^SWIV
EL^MEDICAL||MDSWIVEL^SWIVEL^MEDICAL|8880|7738882872^PRN^PH|""|^SWIVEL^SWIVE
L CHAIR FLOW||4|SWIVEL CHAIR PRACITCE^^^^^^^^^8880|SWIVEL CHAIR PRACTICE
ADDRESS^^CHICAGO^IL|7928887772^PRN^PH|ROLL ROAD^^CHIAGO^IL^60610||

OBR|1|A47FD69F4F12492^ABC||SWIVEL 2^CBC WITH DIFF -
SWIVEL|ROUTINE||||O||||MDSWIVEL^SWIVEL^MEDICAL|7738882872^PRN^PH||||||^R
OUTINE||||123.9^CESTODE INFECTION NOS^ICD9||||20091002141700

DG1|1|I9|123.9^CESTODE INFECTION NOS^ICD9

ORC|NW|F3D646531412493^ABC||6EE7F83A4657900||||20091002141706|MDSWIVEL^SWIVE
L^MEDICAL||MDSWIVEL^SWIVEL^MEDICAL|8880|7738882872^PRN^PH|""|^SWIVEL^SWIVEL
CHAIR FLOW||4|SWIVEL CHAIR PRACITCE^^^^^^^^^8880|SWIVEL CHAIR PRACTICE
ADDRESS^^CHICAGO^IL|7928887772^PRN^PH|ROLL ROAD^^CHIAGO^IL^60610||

OBR|2|F3D646531412493^ABC||SWIVEL 3^CHEM20 -
SWIVEL|ROUTINE||||O||||MDSWIVEL^SWIVEL^MEDICAL|7738882872^PRN^PH||||||^R
OUTINE||||121.4^FASCILOPSIASIS^ICD9||||20091002141700

DG1|2|I9|121.4^FASCILOPSIASIS^ICD9

9.3. Message Segments Layout

HL7 ORM^O01 messages with ORC-1 Order Control Code = NW will be sent from ABC Company whenever Receiving Facility User transmits an Order from Orders Manager.

Each Orderable/Test corresponds to a pair of ORC-OBR pair.

Each ORM message supports single and multiple Orderable(s) in a group of Orders. This is a partner configurable.

New Order:

Segment	Name	Required
MSH	Message Header	Y
{{ NTE }}	Notes and Comments (for Header)	-
[--- PATIENT begin	
PID	Patient Identification	Y
[PD1]	Additional Demographics	N
{{ NTE }}	Notes and Comments (for Patient ID)	-
[--- PATIENT_VISIT begin	
PV1	Patient Visit	N
[PV2]	Patient Visit- Additional Info	N
]	--- PATIENT_VISIT end	
{{	--- INSURANCE begin	
IN1	Insurance	N
[IN2]		N
[IN3]		N
}}		
[GT1]	Guarantor	N
{{ AL1 }}	Allergy Information	N
]	-- PATIENT end	
{	--- ORDER begin	
ORC	Common Order	Y
[--- ORDER_DETAIL begin	
<OBR	Order Detail Segment OBR, etc.	Y
RQD		-
RQ1		-
RXO		-
ODS		-
ODT>		-
{{ NTE }}	Notes and Comments (for Detail)	-
[CTD]	Contact Data	-
{{ DG1 }}	Diagnosis	Y
{{	--- OBSERVATION begin	
OBX	Observation/Result	-
{{ NTE }}	Notes and Comments (for Results)	-
}}	--- OBSERVATION end	
]	--- ORDER_DETAIL end	

* [] stands for optional elements

{ } stands for repeating elements.

** Required – Y means compulsory for both Integrated and Non-Integrated Mode

N means not present in Non-Integrated Mode except IN1 (present if patient has non-zero number of health plans). For Integrated Mode, these segments will be present if they exist in A04/05 response message.

- means not supported

9.4. Message Segments Field Layout

The MSH segment defines the intent, source, destination, and some specifics of the syntax of a message.

HL7 Attribute Table - MSH - Message Header

SEQ	LEN	DT	OPT	RP/#	ELEMENT NAME	NOTES
1	1	ST	R		Field Separator	" "
2	4	ST	R		Encoding Characters	@'^~\&"
3	227	HD	R		Sending Application	Integrated Mode - = ABC Non-Integrated Mode - Partner Pipe Configurable via rTools say SAP
4	227	HD	R		Sending Facility	Integrated Mode – Populated from A04/A05 Non-Integrated Mode - Partner Pipe Configurable via rTools say ABC
5	227	HD	R		Receiving Application	Integrated and Non-Integrated Modes - Partner Pipe Configurable via rTools say MRM
6	227	HD	R		Receiving Facility	Integrated Mode - Partner Pipe Configurable via rTools say FACX Non-Integrated Mode – External Value of Receiving Facility Practice say FACX
7	14	TS	R		Date/Time of Message	Integrated Mode – Populated from A04/A05 Non-Integrated Mode – Last Modified Date of Order (If multiple ones exists, first one is taken)
8	40	ST	O		Security	Integrated Mode – Populated from A04/A05 Non-Integrated Mode – Not Supported
9	15	MSG	R		Message Type	"ORM^O01"

SEQ	LEN	DT	OPT	RP/#	ELEMENT NAME	NOTES
11	3	PT	R		Processing ID	Integrated Mode – Populated from A04/A05 Non-Integrated Mode - Partner Pipe Configurable via rTools Used to decide how to process the message. One of the three possible values: “D” Debugging “P “ Production “T” Testing
12	60	VID	R		Version ID	Integrated Mode – = 2.5 Non-Integrated Mode - Partner Pipe Configurable via rTools (=2.5)
13		NM	-		Sequence Number	
14		ST	-		Continuation Pointer	
15	2	ID	O		Accept Acknowledgment Type	Integrated Mode – = “AL” Non-Integrated Mode – Not Supported
16		ID	-		Application Acknowledgment Type	
17		ID	-		Country Code	
18		ID	-		Character Set	
19		CE	-		Principal Language Of Message	
20		ID	-		Alternate Character Set Handling Scheme	
21		EI	-		Message Profile Identifier	

PID - Patient Identification Segment

For Integrated Mode, PID segment is populated with PID from A04/05 response.

HL7 Attribute Table - PID - Patient Identification

SEQ	LEN	DT	OPT	RP/#	ELEMENT NAME	NOTES
1	4	SI	O		Set ID - PID	= 1
2	20	CX	O		Patient ID	Non-Integrated Mode – Contains the Patient Enterprise Id, if Partner Pipe is configured via rTools to contain PatientEnterpriseId as one of the PatientIdType PID2.1 ID Number – e.g HNE PID2.4 Assigning Authority & PID2.5 Identifier Type Code – Partner Pipe Configurable via rTools PID2.6 Assigning Facility - External Value of Receiving Facility Practice E.g. P12312312^^^PASSPORT^HNE^ABC COMPANY
4	20	CX	-		Alternate Patient ID - PID	
5	250	XP	R	Y	Patient Name	Consists of Patient's First Name and Last Name E.g. SMITH^JASON
6	250	XP	-		Mother's Maiden Name	
7	26	TS	-		Date/Time of Birth	Patient's Birth Date. Doesn't include time part E.g. 19850820
8	1	IS	R		Administrative Sex	Patient's Gender. Supported Values – Male = M Female = F Unknown = U Unspecified = O
9	250	XP	-	Y	Patient Alias	
10	250	CE	O	Y	Race	Supported Values – PID10 Text, Identifier Asian – A^A African American – B^B Caucasian – C^C Hispanic – H^H Native American – I^I Other – O^O Race not indicated – X^X
12	4	IS	-		County Code	Patient's Home Phone #
13	250	XTN	O		Phone Number - Home	PID13.1 Telephone Number – Ordering Provider's Phone #

						PID13.2 Telecommunication Use Code = PRN PID13.3 Telecommunication Equipment Type = PH E.g. (419) 555-9876^PRN^PH
14	250	XTN	-		Phone Number - Business	
15	250	CE	-		Primary Language	
16	250	CE	R		Marital Status	Patient's Marital Status. Supported Values – (Identifier, Text) M, Married S, Single D, Divorced U, Unknown
17	250	CE	O		Religion	
18	250	CX	R		Patient Account Number	PID18.1 ID – Patient's Account Number
19	16	ST	-		SSN Number - Patient	
20	25	DLN	-		Driver's License Number - Patient	
21	250	CX	-	Y	Mother's Identifier	
22	250	CE	-	Y	Ethnic Group	
23	250	ST	-		Birth Place	
24	1	ID	-		Multiple Birth Indicator	
25	2	NM	-		Birth Order	
26	250	CE	-	Y	Citizenship	
27	250	CE	-		Veterans Military Status	
28	250	CE	-		Nationality	
29	26	TS	-		Patient Death Date and Time	
30	1	ID	-		Patient Death Indicator	
31	1	ID	-		Identity Unknown Indicator	
32	20	IS	-	Y	Identity Reliability Code	
33	26	TS	-		Last Update Date/Time	
34	241	HD	-		Last Update Facility	
35	250	CE	-		Species Code	
36	250	CE	-		Breed Code	
37	80	ST	-		Strain	
38	250	CE	-	2	Production Class Code	
39	250	CWE	-	Y	Tribal Citizenship	

ORC - Common Order Segment

HL7 Attribute Table – ORC – Common Order

SEQ	LEN	DT	OPT	RP/#	ELEMENT NAME	NOTES
1	2	ID	R		Order Control	= NW New order/service
3	22	EI	-		Filler Order Number	
4	15	EI	R		Placer Group Number	ORC4.1 – Entity Identifier – System Generated 15 chars long Alphanumeric string
5	2	ID	-		Order Status	
6	1	ID	-		Response Flag	
7	200	TQ	-		Quantity/Timing	
8	200	EIP	-		Parent	
9	14	TS	R		Date/Time of Transaction	Last Modified Date of Order (If multiple ones exists, first one is taken) Last Modified Date of Order (If multiple ones exists, first one is taken)
10	250	XCN	R	N	Entered By	Submitter of Order ORC10.1 ID Number – External Value corresponding to Submitter's Provider ID [for Provider] or Submitter's Internal Login ID [for Staff] E.g. 32^ADAI^FRANK
11	250	XCN	-		Verified By	
12	250	XCN	R	N	Ordering Provider	ORC12.1 ID Number – External Value corresponding to Ordering Provider's Provider ID E.g. 32^ADAI^FRANK
13	80	PL	R		Enterer's Location	ORC13.1 Point of Care – External Value corresponding to Ordering Practice's Practice ID
14	250	XTN	R	N	Call Back Phone Number	ORC14.1 Telephone Number – Ordering Provider's Phone # ORC14.2 Telecommunication Use Code = PRN ORC14.3 Telecommunication Equipment Type = PH E.g. 7034092889^PRN^PH
15	26	TS	-		Order Effective Date/Time	
16	250	CE	R		Order Control Code Reason	Set to empty string
17	250	CE	O		Entering Organization	Health System/Organization of Order Submitter (ORC10) ORC17.1 Identifier – External Value corresponding to Health System's ID (Optional)

SEQ	LEN	DT	OPT	RP/#	ELEMENT NAME	NOTES
						ORC17.2 Text – Health System's Name
18	250	CE	-		Entering Device	
19	250	XCN	-		Action By	
20	250	CE	R		Advanced Beneficiary Notice Code	= 4 Advanced Beneficiary Notice has not been signed
21	250	XON	R	N	Ordering Facility Name	Ordering Practice ORC21.1 Organization Name – Practice Name ORC21.10 Organization Identifier – External Value corresponding to Practice ID E.g. MRM^^^^^^^^FACX
22	250	XAD	O	N	Ordering Facility Address	Address of Ordering Practice E.g. GOLF ROAD^^CHICAGO^IL^60610
23	250	XTN	O	N	Ordering Facility Phone Number	ORC23.1 Telephone Number – Ordering Practice's Phone # ORC23.2 Telecommunication Use Code = PRN ORC23.3 Telecommunication Equipment Type = PH E.g. 7034092889^PRN^PH
24	250	XAD	O	Y	Ordering Provider Address	Address of Ordering Provider E.g. GOLF ROAD^^CHICAGO^IL^60610
25	250	CWE	-		Order Status Modifier	
26	60	CWE	-		Advanced Beneficiary Notice Override Reason	
27	26	TS	-		Filler's Expected Availability Date/Time	
28	250	CWE	-		Confidentiality Code	
29	250	CWE	-		Order Type	
30	250	CNE	-		Enterer Authorization Mode	

OBR - Observation Request Segment

HL7 Attribute Table – OBR – Observation Request

SEQ	LEN	DT	OPT	RP/#	ELEMENT NAME	NOTES
1	4	SI	R		Set ID – OBR	For the first order transmitted, the sequence number shall be 1; for the second order, it shall be 2; and so on.
2	15	EI	R		Placer Order Number	OBR2.1 – Entity Identifier – System Generated 15 chars long Alphanumeric string OBR2.2 – Namespace ID - = ABC
3	22	EI	-		Filler Order Number	
4	250	CE	R		Universal Service Identifier	OBR4.1 Identifier – Orderable Code OBR4.2 Text – Orderable Name E.g. 2091^CHEST CT - LEFT
5	2	ID	R		Priority – OBR	Supported Values – STAT, ASAP, ROUTINE
6	26	TS	-		Requested Date/Time	
7	26	TS	O		Observation Date/Time #	Specimen Collection DateTime (For laboratory tests when specimen is collected.)
8	26	TS	-		Observation End Date/Time #	
9	20	CQ	O		Collection Volume *	For laboratory tests, the collection volume is the volume of a specimen. OBR9.1 Quantity OBR9.2 Units
10	250	XCN	-		Collector Identifier *	
11	1	ID	R		Specimen Action Code *	= O Specimen obtained by service other than Lab
12	250	CE	-		Danger Code	
13	300	ST	O		Relevant Clinical Information	Additional Notes
14	26	TS	-		Specimen Received Date/Time *	
16	250	XCN	O	Y	Ordering Provider	OBR16.1 ID Number – External Value corresponding to Ordering Provider's Provider ID E.g.

SEQ	LEN	DT	OPT	RP/#	ELEMENT NAME	NOTES
						32^ADAIR^FRANK Same as ORC12
17	250	XTN	O	Y/2	Order Callback Phone Number	OBR17.1 Telephone Number – Ordering Provider's Phone # OBR17.2 Telecommunication Use Code = PRN OBR17.3 Telecommunication Equipment Type = PH E.g. 7034092889^PRN^PH Same as ORC14
18	60	ST	-		Placer Field 1	
19	60	ST	-		Placer Field 2	
20	60	ST	-		Filler Field 1 +	
21	60	ST	-		Filler Field 2 +	
22	26	TS	-		Results Rpt/Status Chng - Date/Time +	
23	40	MOC	-		Charge to Practice +	
24	10	ID	-		Diagnostic Serv Sect ID	
25	1	ID	-		Result Status +	
26	400	PRL	-		Parent Result +	
28	250	XCN	O	Y	Result Copies To	List of CC'ed Providers. ID Number is the external value of corresponding Provider ID.
29	200	EIP	-		Parent	
30	20	ID	-		Transportation Mode	
31	250	CE	R	Y	Reason for Study	List of ICD9 Codes associated with the Orderable. Same as DG1 OBR31.1 – Identifier – ICD9 Code OBR31.2 – Text – ICD9 Code Description OBR31.3 – Name of Coding System = ICD9 Eg: - 234.8^CA IN SITU NEC^ICD9
32	200	NDL	-		Principal Result Interpreter +	
33	200	NDL	-	Y	Assistant Result Interpreter +	
34	200	NDL	-	Y	Technician +	
35	200	NDL	-	Y	Transcriptionist +	
36	14	TS	R		Scheduled Date/Time +	Date/time the filler scheduled an observation.
37	4	NM	-		Number of Sample Containers *	
38	250	CE	-	Y	Transport Logistics of Collected Sample *	
39	250	CE	-	Y	Collector's Comment *	

SEQ	LEN	DT	OPT	RP/#	ELEMENT NAME	NOTES
40	250	CE	-		Transport Arrangement Responsibility	
41	30	ID	-		Transport Arranged	
42	1	ID	-		Escort Required	
43	250	CE	-	Y	Planned Patient Transport Comment	
44	250	CE	-		Procedure Code	
45	250	CE	-	Y	Procedure Code Modifier	
46	250	CE	-	Y	Placer Supplemental Service Information	
47	250	CE	-	Y	Filler Supplemental Service Information	
48	250	CWE	-		Medically Necessary Duplicate Procedure Reason.	
49	2	IS	-		Result Handling	

DG1 - Diagnosis Segment

Multiple ICD9 Codes are supported per Orderable/Test/ORC-OBR Pair. Thus, there will be a DG1 segment corresponding to each ICD9 Code.

HL7 Attribute Table - DG1 – Diagnosis

SEQ	LEN	DT	OPT	RP/#	ELEMENT NAME	NOTES
1	4	SI	R		Set ID - DG1	This field contains the number that identifies this transaction. For the first occurrence of the segment the sequence number shall be 1, for the second occurrence it shall be 2, etc.
2	2	ID	R		Diagnosis Coding Method	= I9
3	250	CE	R	N	Diagnosis Code - DG1	DG1.3.1 – Identifier – ICD9 Code DG1.3.2 – Text – ICD9 Code Description DG1.3.3 – Name of Coding System = ICD9 Eg: - 234.8^CA IN SITU NEC^ICD9
4	40	ST	-		Diagnosis Description	
5	26	TS	-		Diagnosis Date/Time	
6	2	IS	-		Diagnosis Type	
7	250	CE	-		Major Diagnostic Category	
8	250	CE	-		Diagnostic Related Group	
9	1	ID	-		DRG Approval Indicator	
10	2	IS	-		DRG Grouper Review Code	
11	250	CE	-		Outlier Type	
12	3	NM	-		Outlier Days	
13	12	CP	-		Outlier Cost	
14	4	ST	-		Grouper Version And Type	
15	2	ID	-		Diagnosis Priority	
16	250	XCN	-		Diagnosing Clinician	
17	3	IS	-		Diagnosis Classification	
18	1	ID	-		Confidential Indicator	
19	26	TS	-		Attestation Date/Time	
20	427	EI	-		Diagnosis Identifier	
21	1	ID	-		Diagnosis Action Code	

* Required – Y means compulsory

- means not supported

**RP/# - N means Not Repeated [For each ICD9 Code there will be a corresponding DG1 segment]

10. Inbound ORM Status Update from LIS / RIS

ORM messages from ABC Company's partner that are in response to an order transmitted by ABC Company. Placer order number and Placer group number are required for all inbound messages to be processed.

10.1. Sample ORM Status Update Message

The HL7 version expected by ABC Company is 2.5. Partners using different versions of HL7 should coordinate with the ABC Company's Professional Services department for conversion of inbound messages to the HL7 version 2.5.

Status Update Message from LIS

```
MSH|^~\&|SWIVEL|8880|8500|ABC COMPANY|20090909130907||ORM^O01|7679|D|2.5
PID|1|SWIVEL^^^PASSPORT^HNE^8880|SWIVEL^^^ST1^MR~SWIVEL^^^PASSPORT^HNE||SWIVEL^
PT||19870101|M||||^^^60610||(934) 032-9432^PRN^PH||||U^UNKNOWN||SWIVEL
ORC|OC|756CC0DEF2E7679^ABC|18c96096-e795-46d2-b31a-
d9a895a6db6c|AB30AF7A6594955|CA||||20090909210907|MDSWIVEL^SWIVEL^MEDICAL||MDSWIVE
L^SWIVEL^MEDICAL|8880|7738882872^PRN^PH||||4|SWIVEL CHAIR
PRACITCE^^^^^^8880||ROLL ROAD^^CHIAGO^IL^60610
OBR|1|756CC0DEF2E7679^ABC||00001^CANDY
CT|ROUTINE||||O||||RIGHT|MDSWIVEL^SWIVEL^MEDICAL|7738882872^PRN^PH|||||||||2009090
9130900
```

10.2. Message Segments Layout

MSH - message header segment

The MSH segment defines the intent, source, destination, and some specifics of the syntax of a message.

HL7 Attribute Table - MSH - Message Header

SEQ	LEN	DT	OPT	RP/#	ELEMENT NAME	NOTES
1	1	ST	R		Field Separator	" "
2	4	ST	R		Encoding Characters	@'^~\&"
3	227	HD	R		Sending Application	Partner Pipe Configurable via rTools
4	227	HD	R		Sending Facility	Partner Pipe Configurable via rTools
5	227	HD	R		Receiving Application	Partner Pipe Configurable via rTools
6	227	HD	O		Receiving Facility	
7	14	TS	O		Date/Time of Message	
8	40	ST	-		Security	
9	15	MSG	R		Message Type	Partner Pipe Configurable via rTools E.g. "ORM^O01"

SEQ	LEN	DT	OPT	RP/#	ELEMENT NAME	NOTES
10	Integra ted Mode = 20 Non- Integra ted Mode = 10	ST	O		Message Control ID	
11	3	PT	-		Processing ID	
12	60	VID	R		Version ID	= 2.5
13		NM	-		Sequence Number	
14		ST	-		Continuation Pointer	
15	2	ID	-		Accept Acknowledgment Type	
16		ID	-		Application Acknowledgment Type	
17		ID	-		Country Code	
18		ID	-		Character Set	
19		CE	-		Principal Language Of Message	
20		ID	-		Alternate Character Set Handling Scheme	

* Required

R means compulsory

O means optional

- means not supported

ORC - Common Order Segment

ABC Company will correlate the ORM responses to Orders in ABC Company based on Placer Order Number (ORC2/OBR2) and Placer Group Number (ORC4)
Status of an Order in ABC Company is determined based on ORC5 Order Status and ORC1 Control Code. ORC5 takes precedence over ORC1.

Order Statuses and Corresponding ORC1 and ORC5 Values –

Order Status	ORC5	ORC1
In Progress	IP, O, S, N, P, L, T, I, G	XO, SN, NA, SC
Received by Facility	R	
Results to Follow	CM, V, D	RE
Cancelled	CA	OC

HL7 Attribute Table – ORC – Common Order

SEQ	LEN	DT	OPT	RP/#	ELEMENT NAME	NOTES
1	2	ID	O		Order Control	Supported Control Codes – XO SN NA CH SC RE OC
2	15	EI	R		Placer Order Number	ORC2.1 – Entity Identifier – 15 chars long Alphanumeric string ORC2.2 – Namespace ID - = ABC
3	22	EI	O		Filler Order Number	
4	15	EI	R		Placer Group Number	ORC4.1 – Entity Identifier – 15 chars long Alphanumeric string
5	2	ID	O		Order Status	Supported Values – IP O S N P L T I G R CM V D CA
6	1	ID	-		Response Flag	
7	200	TQ	-		Quantity/Timing	
8	200	EIP	-		Parent	
9	14	TS	-		Date/Time of Transaction	
10	250	XCN	-	N	Entered By	

SEQ	LEN	DT	OPT	RP/#	ELEMENT NAME	NOTES
11	250	XCN	-		Verified By	
12	250	XCN	-	N	Ordering Provider	
13	80	PL	-		Enterer's Location	
14	250	XTN	-		Call Back Phone Number	
15	26	TS	-		Order Effective Date/Time	
16	250	CE	O		Order Control Code Reason	
17	250	CE	-		Entering Organization	
18	250	CE	-		Entering Device	
19	250	XCN	-		Action By	
20	250	CE	-		Advanced Beneficiary Notice Code	
21	250	XON	-	N	Ordering Facility Name	
22	250	XAD	-	N	Ordering Facility Address	
23	250	XTN	-	N	Ordering Facility Phone Number	
24	250	XAD	-	Y	Ordering Provider Address	
25	250	CWE	-		Order Status Modifier	
26	60	CWE	-		Advanced Beneficiary Notice Override Reason	
27	26	TS	-		Filler's Expected Availability Date/Time	
28	250	CWE	-		Confidentiality Code	
29	250	CWE	-		Order Type	
30	250	CNE	-		Enterer Authorization Mode	

* Required – R means compulsory

O means optional

- means not supported

OBR - Observation Request Segment

HL7 Attribute Table – OBR – Observation Request

SEQ	LEN	DT	OPT	RP/#	ELEMENT NAME	NOTES
1	4	SI	O		Set ID – OBR	
2	15	EI	R		Placer Order Number	OBR2.1 – Entity Identifier – System Generated 15 chars long Alphanumeric string OBR2.2 – Namespace ID - = ABC
3	22	EI	-		Filler Order Number	
4	250	CE	-		Universal Service Identifier	
5	2	ID	-		Priority – OBR	
6	26	TS	-		Requested Date/Time	
7	26	TS	-		Observation Date/Time #	
8	26	TS	-		Observation End Date/Time #	
9	20	CQ	-		Collection Volume *	
10	250	XCN	-		Collector Identifier *	
11	1	ID	-		Specimen Action Code *	
12	250	CE	-		Danger Code	
13	300	ST	-		Relevant Clinical Information	
14	26	TS	-		Specimen Received Date/Time *	
15	300	SPS	-		Specimen Source	
16	250	XCN	-	Y	Ordering Provider	
17	250	XTN	-	Y/2	Order Callback Phone Number	
18	60	ST	-		Placer Field 1	
19	60	ST	-		Placer Field 2	
20	60	ST	-		Filler Field 1 +	
21	60	ST	-		Filler Field 2 +	
22	26	TS	-		Results Rpt/Status Chng - Date/Time +	
23	40	MOC	-		Charge to Practice +	
24	10	ID	-		Diagnostic Serv Sect ID	
25	1	ID	-		Result Status +	
26	400	PRL	-		Parent Result +	
27	200	TQ	-	N	Quantity/Timing	
28	250	XCN	-	Y	Result Copies To	
29	200	EIP	-		Parent	
30	20	ID	-		Transportation Mode	
31	250	CE	-	Y	Reason for Study	
32	200	NDL	-		Principal Result Interpreter +	

SEQ	LEN	DT	OPT	RP/#	ELEMENT NAME	NOTES
33	200	NDL	-	Y	Assistant Result Interpreter +	
34	200	NDL	-	Y	Technician +	
35	200	NDL	-	Y	Transcriptionist +	
36	14	TS	-		Scheduled Date/Time +	
37	4	NM	-		Number of Sample Containers *	
38	250	CE	-	Y	Transport Logistics of Collected Sample *	
39	250	CE	-	Y	Collector's Comment *	
40	250	CE	-		Transport Arrangement Responsibility	
41	30	ID	-		Transport Arranged	
42	1	ID	-		Escort Required	
43	250	CE	-	Y	Planned Patient Transport Comment	
44	250	CE	-		Procedure Code	
45	250	CE	-	Y	Procedure Code Modifier	
46	250	CE	-	Y	Placer Supplemental Service Information	
47	250	CE	-	Y	Filler Supplemental Service Information	
48	250	CWE	-		Medically Necessary Duplicate Procedure Reason.	
49	2	IS	-		Result Handling	

* Required –

R means compulsory

O means optional

- means not supported

11. Quick Start Guide

Connected Orders application enables practices to simplify and automate the process of ordering labs and radiology services, while 'closing the loop' in the patient service experience. Using a simple order form, providers and staff members can create and send orders quickly – and monitor the status of orders in real-time. Whether Sent, Pending, In Process, or Denied – when orders are transmitted electronically, these statuses are displayed to the ordering provider as appropriate, allowing providers to follow up on orders that are not filled and to ensure patient compliance.

Benefits

- Creation process provides an easy to use, front-end workflow module for laboratory and radiology orders
- Favorite lists allow for rapid order creation workflows by providing configurable lists of commonly used tests and order sets
- Orderable mapping services ensure that orderables selected from the are matched with the appropriate client catalogs
- Orders transmit electronically for connected organizations and by fax (if setup by the ordering physician) to all other fulfillment locations
- Network Identity Management used for connected organizations accurately maps external patients to hospital patients – using the hospital's own identifiers
- The orders receipt process provides hospitals with the ability to queue orders prior to the patient presenting to fill the lab or radiology test

This Guide includes the following QuickStarts addressing the following use cases and overviews:

QuickStart: ORD 1.1 – Creating a Connected Order

QuickStart: ORD 1.2 – Orderable Favorites List

QuickStart: ORD 1.3 – Review Orders Status

QuickStart: ORD 1.4 – Navigating Orders Registration Manager

QuickStart: ORD 1.5 – Understanding Order States

QuickStart: ORD 1.6 – Receiving and Processing Orders

QuickStart: ORD 1.7 – Printing Individual or Batch Orders

Additionally, Appendix A in this document includes a list of Frequently Asked Questions (FAQs) related to Connected Orders.

How to Use this Feature Guide

By reviewing the QuickStarts contained in this Feature Guide, you will gain a better understanding of the many ways in which you can use the versatile Connected Orders features. Each QuickStart is meant to be a stand-alone document detailing how a specific aspect of Connected Orders works. What you need to do and how you need to use each feature will determine which QuickStart is appropriate for your particular workflow.

QuickStart

Connected Orders

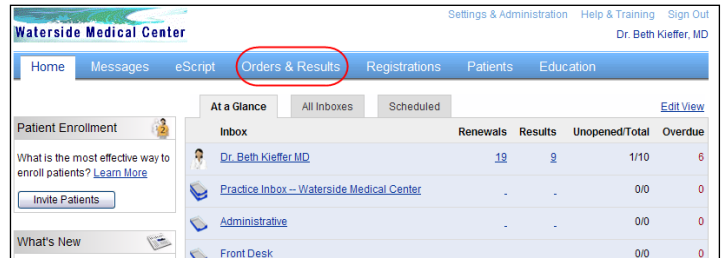
ORD 1.1 – Creating a Connected Order

Point Person: Providers and Staff Members

Using the Connected Orders 'Create New Order' workflow, providers or staff members can create laboratory or radiology orders for both online and offline patients and transmit those orders to a sponsor's designated receiving facility.

1. From the Home page, click the **Orders & Results** or **Orders** tab.

Note: Practices that have both Connected Orders and Results Manager will view the combined 'Orders & Results' tab. Practices that do not have Results Manager enabled view the 'Orders' tab.

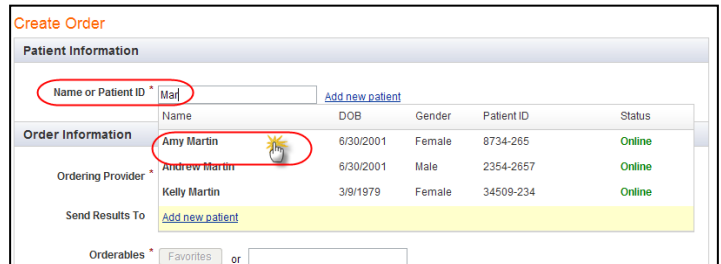


2. On the secondary navigation menu, click **Create New Order**.



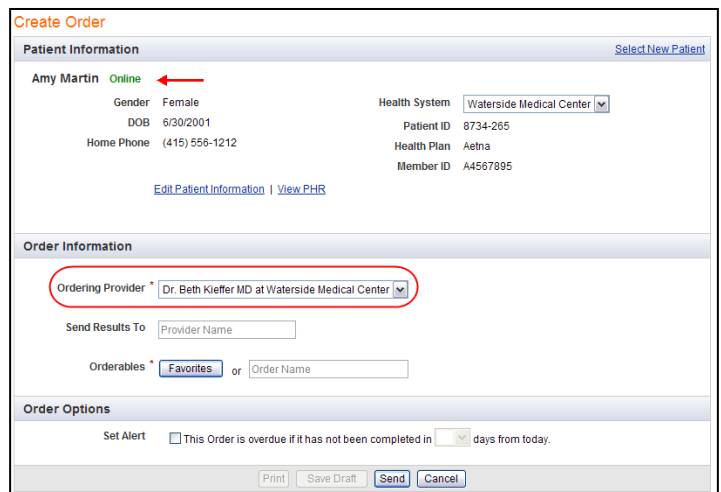
3. Under *Patient Information*, enter the first few characters of the patient's name or Patient ID in the type-ahead search field. Select the patient from the drop down list.

Note: If the patient is not found, click the **Add new patient** link to add the patient



4. The selected patient's information now appears in the *Patient Information* section of the form. Note that the service indicates the patient's status (online or offline) to the right of the patient name.

Under the *Order Information* section of the form, note the **Ordering Provider** defaults to the logged-in provider if applicable. Staff members composing orders will select the ordering provider from a drop-down list.



5. To copy another provider in your health system (i.e., specialist or consulting provider) on the results, enter the name of the provider in the **Copy Results To** type-ahead search field. Select the provider from the drop-down list.

The screenshot shows the 'Create Order' form with the following sections:

- Patient Information:** Amy Martin, Online, Female, DOB 6/30/2001, Home Phone (415) 556-1212. Health System: Waterside Medical Center, Patient ID: 8734-265, Health Plan: Aetna, Member ID: A4567895. Links: Edit Patient Information, View PHR.
- Order Information:** Ordering Provider: Dr. Beth Kieffer MD at Waterside Medical Center. Send Results To: Stone (dropdown). Orderables: Dr. Robert Stone (dropdown), Waterside Medical Center (dropdown).
- Order Options:** Set Alert: ☐ This Order is overdue if it has not been started in [] days from today. Buttons: Print, Save Draft, Send, Cancel.

6. The provider now appears in the **Copy Results To** list. To remove this provider, click the ✖ icon to the right of the provider name.

Note: You can add additional providers in your health system to the **Send Results To** list (i.e., clinical CC to a specialist), if appropriate. Type the first few characters of a provider's name in the type-ahead search field and select the provider from the list.

The screenshot shows the 'Create Order' form with the following sections:

- Patient Information:** Same as the previous screenshot.
- Order Information:** Ordering Provider: Dr. Beth Kieffer MD at Waterside Medical Center. Send Results To: Dr. Robert Stone at Waterside Medical Center (dropdown). Orderables: Favorites (button) or Order Name (text field).
- Order Options:** Same as the previous screenshot.

7. Select the **Orderables** to include in this order. If you have a list of Favorites established, click **Favorites** and select the orderable from your Favorites list. Alternatively, enter the first few letters of the orderable in the Order Name type-ahead search field.

Note: QuickStart 'ORD 1.2 Orderable Favorites List' provides instructions for managing and using your personalized Favorites list.

The screenshot shows the 'Create Order' form with the following sections:

- Patient Information:** Same as the previous screenshots.
- Order Information:** Ordering Provider: Dr. Beth Kieffer MD at Waterside Medical Center. Send Results To: Dr. Robert Stone at Waterside Medical Center ✖. Orderables: Favorites (button) or Elbow (dropdown). Order Name: MRM CR ELBOW 2 VIEWS (text field). Orderable: MRM CR ELBOW COMPLETE (dropdown).
- Order Options:** Same as the previous screenshots.

8. The Order Information section expands to allow for collection of information related to the specific orderable. In this example, we are creating a radiology order, which allows for entry of items specific to the test type (i.e., laterality).

Select **Priority** (STAT, ASAP, or Routine) using the radio button.

Select **Laterality** (Left, Right, or Bilateral) using the radio button.

Enter an **ICD9** code in the type-ahead ICD9 Search field. Select the appropriate code from the options provided.

If appropriate, enter **Notes** in the free-text field to accompany this orderable.

If required by the patient's health plan and/or your practice, enter the **Authorization #** in the field provided.

Note: The Order Information area also indicates the facility to which the order will transmit. This area defaults by facility and order type (laboratory or radiology) as well as the patient's ZIP code. Providers and staff members may optionally change the facility or add a new 'fax to' facility if necessary.

Create Order

Patient Information [Select New Patient](#)

Amy Martin **Online**

Gender: Female
DOB: 6/30/2001
Home Phone: (415) 556-1212

Health System: Waterside Medical Center
Patient ID: 8734-295
Health Plan: Aetna
Member ID: A4567895

[Edit Patient Information](#) | [View PHR](#)

Order Information

Ordering Provider: Dr. Beth Kieffer MD at Waterside Medical Center

Send Results To: Dr. Robert Stone at Waterside Medical Center

Orderables: **Favorites** or Order Name

MRM CR ELBOW 2 VIEWS [Remove](#)

Priority: ☐ STAT ☐ ASAP ☒ Routine

Laterality: ☐ Left ☐ Right ☒ Bilateral

ICD9: 959.3 - Elb/forearm/wr Inj Nec

Notes

Auth# AE-123-45678

Facility: [Change](#)
Waterside Medical Center

Order Options

Set Alert ☐ This Order is overdue if it has not been started in days from today.

[Print](#) [Save Draft](#) [Send](#) [Cancel](#)

9. To add another test to the order, click **Favorites** and select the orderable from your Favorites list or enter the first few letters of the orderable in the Order Name type-ahead search field.

Order Information

Ordering Provider: Dr. Beth Kieffer MD at Waterside Medical Center

Send Results To: Dr. Robert Stone at Waterside Medical Center

Orderables: **Favorites** or Order Name

MRM CR ELBOW 2 VIEWS [Remove](#)

Priority: ☐ STAT ☐ ASAP ☒ Routine

Laterality: ☐ Left ☐ Right ☒ Bilateral

ICD9: 959.3 - Elb/forearm/wr Inj Nec

Notes

Auth# AE-123-45678

Facility: [Change](#)
Waterside Medical Center

Order Options

10. Again, the form expands to allow for collection of information specific to the test type. In this example, we selected a laboratory test.

Select **Priority** (STAT, ASAP, or Routine) using the radio button.

Enter an **ICD9** code in the type-ahead ICD9 Search field. Select the appropriate code from the options provided.

If appropriate, enter **Notes** in the free-text field to accompany this orderable.

If required by the patient's health plan and/or your practice, enter the **Authorization #** in the field provided.

If your organization collected a laboratory specimen from this patient on-site, place a checkmark next to **Collected in Office**.

Order Information

Ordering Provider: Dr. Beth Kieffer MD at Waterside Medical Center

Send Results To: Dr. Robert Stone at Waterside Medical Center

Orderables: **Favorites** or Order Name

Urine Culture [Remove](#)

Priority: ☐ STAT ☐ ASAP ☒ Routine

ICD9: 593.8 - Oth Renal/ureter Disord

Notes

Auth# AE-23-56789

Specimen: ☒ Collected in Office

Facility: [Change](#)
Waterside Medical Center

MRM CR ELBOW 2 VIEWS [Remove](#)

Priority: ☐ STAT ☐ ASAP ☒ Routine

Facility: [Change](#)

11. If you checked the **Collected in Office** checkbox, the form expands to include the current Date and Time. You may adjust these entries by using the calendar icon to select a different date and/or enter a different time. Additionally, Specimen Container and Storage instructions may display in the Specimen Collection area.

12. If appropriate, click **Print Label** to print a label for the specimen container using your local label printer.

13. Some orderables require additional information to be captured and communicated to the laboratory. If appropriate to the test type and the laboratory facility, the order form will include a required 'Ask at Order' (AOE) section. Click the **Complete the required questionnaire** link. The questionnaire will display in a pop-in window. When you have completed the questionnaire, click **Done**.

14. Under the *Order Options* section of the Create Order form, you may optionally choose to set an overdue status alert. To set the alert, click the **Set Alert** checkbox, and select the number of days from the dropdown list.

15. Click **Print** to print the order to a local printer for the patient's chart. The printed copy of the order includes a signature area for the patient (or guardian) to authorize release of medical information related to the order.

Click **Save Draft** to save the order in draft status. When saved in draft status, the order can be reviewed from within the Order Status area. You can access the Order Status area from the secondary navigation bar.

Click **Send** to send the order to the laboratory and/or radiology facility. When sent, you can use the Order Status area to track the status of the order.

Click **Cancel** to cancel the order.

Note: QuickStart 1.3: Review Order Status includes a detailed overview of the Order Status area used for orders review and tracking.

Urine Culture [Remove](#)

Priority ☐ STAT ☐ ASAP ☒ Routine

ICD9 593.8 - Oth Renal/ureter Disord [✖](#)

ICD9 Search

Notes

Auth.# AE-23-56789

Specimen ☒ Collected in Office

Date & Time: 9/11/2009 09:31 AM

[Print Label](#)

Facility [Change](#)
Waterside Medical Center

Ask at Order [Please complete the required questionnaire](#)

Ask at Order Questionnaire

Please select a reason

☐ New medication

☐ Pharmacist noted incorrect technique/non-adherence to therapy

☐ Patient requested instruction

☐ Prescriber requested instruction

☐ Other

Intensive consultation was provided to patient or caregiver for the following devices

☐ Inhaler

☐ Injectable

☐ Spacer

☐ Peak Flow Meter

☐ Glucometer

☐ Blood Pressure Monitor

MRM CR ELBOW 2 VIEWS [Remove](#)

Priority ☐ STAT ☐ ASAP ☒ Routine

Laterality ☐ Left ☐ Right ☒ Bilateral

ICD9 959.3 - ELB/FOREARM/WR INJ NEC [✖](#)

ICD9 Search

Notes

Auth.# AE-123-45678

Order Options

Set Alert ☒ This Order is overdue if it has not been started in 2 days from today.

Order Options

Set Alert ☒ This Order is overdue if it has not been completed in 2 days from today.

ORD 1.2 – Orderable Favorites List

Point Person: Providers and Staff Members

The Favorites Manager feature, used in the process of order creation, allows you to store your frequently used orderables or preferred order sets to aid in creating orders rapidly. Each member of your practice will maintain a separate list of Favorites. This QuickStart describes adding and deleting individual orderables and order sets in your Favorites Manager list.

Add Individual Orderable to Favorites

1. To add an item to your Favorites list while in the Create New Order workflow, first click **Create New Order**, then select a patient and ordering provider.

Note: See QuickStart ORD 1.1 Creating a Connected Order for detailed information related to order creation.

2. To the right of *Orderables*, click **Favorites**.

Home Messages eScript Orders & Results Registrations Patients Education

Create New Order

Create Order

Patient Information

Kelly Martin Online

Gender Female Health System Waterside Medical Center

DOB 3/9/1979 Patient ID 34509-234

Home Phone (415) 556-1212 Health Plan Aetna

Mobile Phone (415) 556-2323 Member ID A4567895

Edit Patient Information | View PHR

Order Information

Ordering Provider Dr. Beth Kieffer MD at Waterside Medical Center

Send Results To Provider Name

Orderables Favorites or Order Name

Order Options

Set Alert ☐ This Order is overdue if it has not been started in days from today.

Print Save Draft Send Cancel

3. Click **Add or Remove Favorites**.

Select Orderables

Add or Remove Favorites

Done Cancel

4. The Favorites Manager displays. Type the first few letters of the orderable into the type-ahead search field.

Note: To add an order set to your list of favorites, follow the instructions below: 'Add an Order Set to Favorites.'

Favorites Manager

Create Order Set

Order Name

You may add favorites by using the search box above.

Close

5. Click on the desired orderable in the result list to select.

Favorites Manager

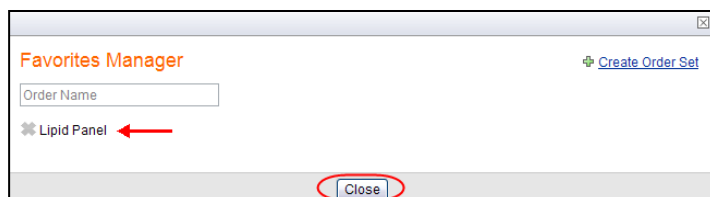
Create Order Set

Lipid Panel

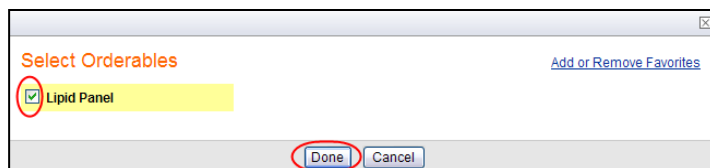
Lipid Test

Close

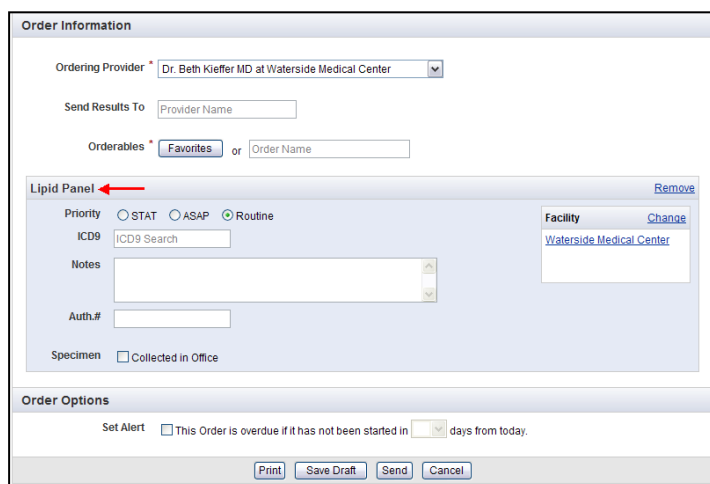
6. The orderable is now included in the Favorites Manager list. Click **Close**.



7. To enter the item into the current order, click the checkbox. The selected item will be highlighted. Click **Done**.

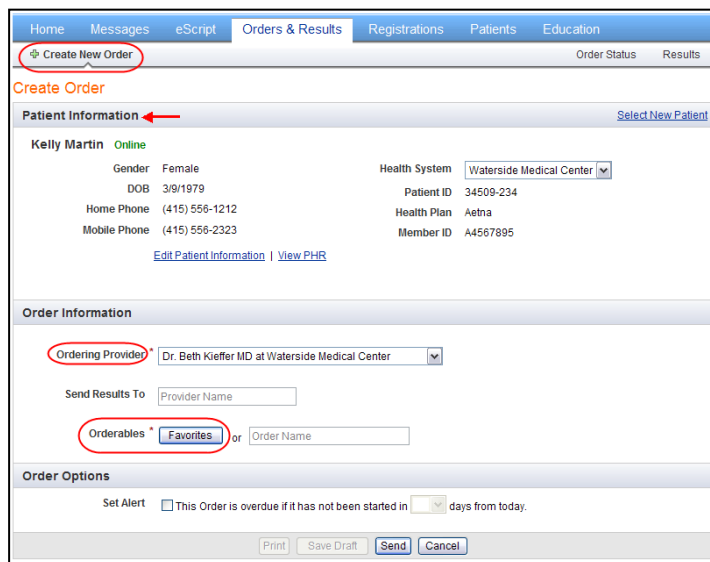


8. The orderable is now included in the current order and will be available in your Favorites list for future use.

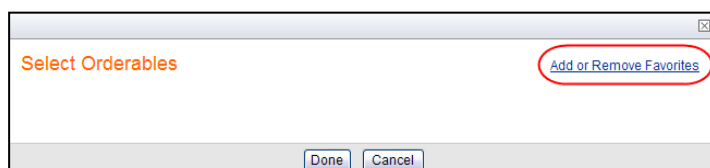


Add Order Set to Favorites

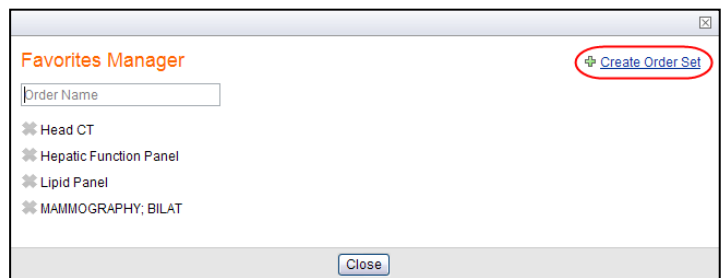
1. To add an order set to your Favorites list while in the Create New Order workflow, first click **Create New Order**, then select a patient and ordering provider.
- Note:** See QuickStart ORD 1.1 Creating a Connected Order for detailed information related to order creation.
2. To the right of *Orderables*, click **Favorites**.



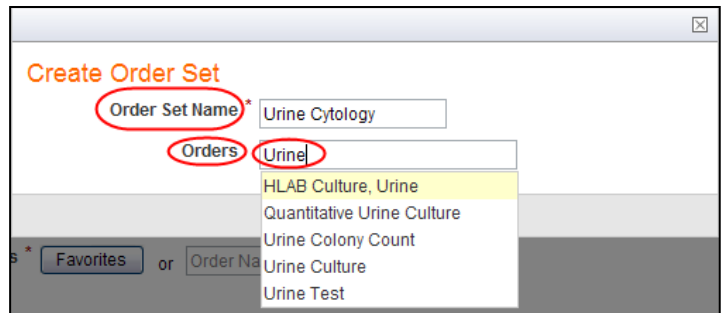
3. Click **Add or Remove Favorites**.



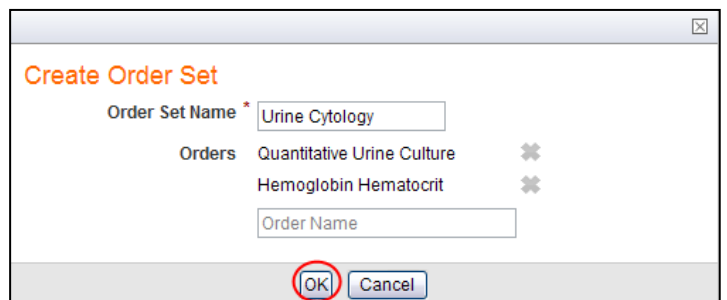
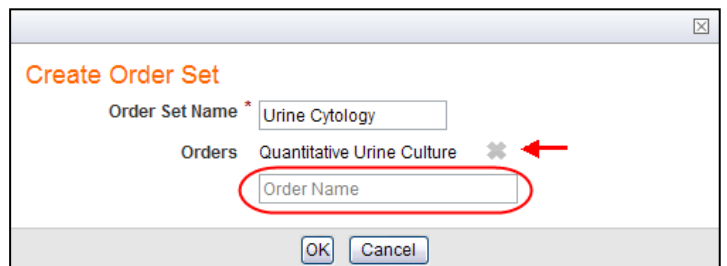
4. The Favorites Manager displays. Click **Create Order Set**.



5. Enter the **Order Set Name** that you would like the order set to appear as. In the type-ahead search field, enter the first few letters of an orderable that you would like to add to the order set. Select the orderable from the result list.

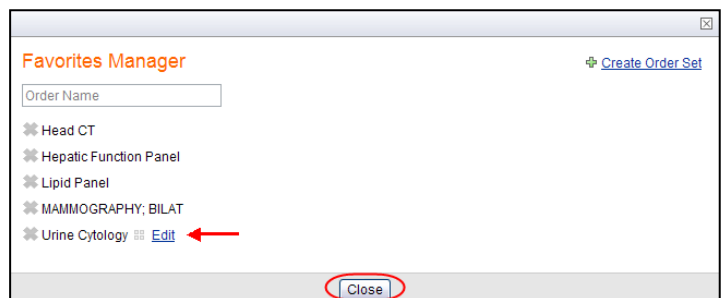


6. The orderable is now included in the list for this order set. Note the ✖ icon to the right of the orderable. To remove this orderable from the orders list, click the ✖.
7. Enter the next orderable in the type-ahead search field and select the orderable from the result list.
8. When you have completed adding the required orderables to the order set, click **OK**.



9. The order set is now included in your personal Favorites Manager list. You may edit the order set at any time using the **Edit** link.
10. Click **Close**.

Note: Favorites Manager indicates the orderable is an order set by including a four-square icon next to the order set name:



11. To add this order set to the current, active order, place a checkmark to the left of the orderable name. The order set you select is highlighted in yellow. Click **Done**.

Select Orderables [Add or Remove Favorites](#)

- ☐ Head CT
- ☐ Hepatic Function Panel
- ☐ Lipid Panel
- ☐ MAMMOGRAPHY; BILAT
- ☒ Urine Cytology

Done Cancel

12. All orderables included in the order set are now included in the order.

Note: See *QuickStart ORD 1.1 Creating a Connected Order* for additional information related to order creation.

Order Information

Ordering Provider * Dr. Beth Kieffer MD at Waterside Medical Center

Send Results To Provider Name

Orderables * **Favorites** or Order Name

HLAB Hemoglobin Hematocrit [Remove](#)

Priority ☐ STAT ☐ ASAP ☒ Routine

ICD9 ICD9 Search

Notes

Auth.#

Specimen ☐ Collected in Office

Facility [Change](#)
Waterside Medical Center

Urine Culture [Remove](#)

Priority ☐ STAT ☐ ASAP ☒ Routine

ICD9 ICD9 Search

Notes

Auth.#

Specimen ☐ Collected in Office

Facility [Change](#)
Waterside Medical Center

Delete Item from Your Favorites

1. You can remove any orderable from your Favorites list at any time. In the Order Creation workflow, click **Favorites** to view the list. Click **Add or Remove Favorites**.

Select Orderables [Add or Remove Favorites](#)

- ☐ Head CT
- ☐ Hepatic Function Panel
- ☐ Lipid Panel
- ☐ MAMMOGRAPHY; BILAT
- ☐ Urine Cytology

Done Cancel

2. To the left of each item in your Favorites Manager, you will see a gray ✖ icon. When you hover your mouse pointer over the icon, it turns red to indicate that you are selecting that item to remove from your Favorites Manager list. Click the ✖ to select the item for removal.

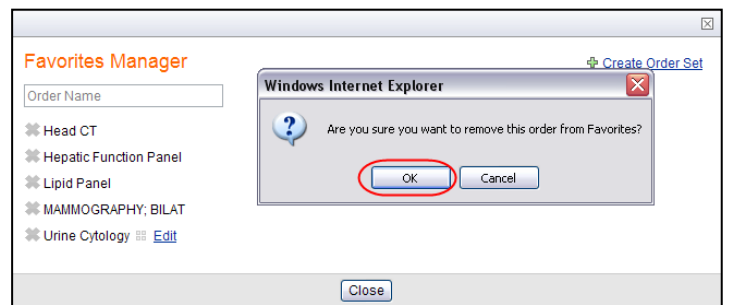
Favorites Manager [Create Order Set](#)

Order Name

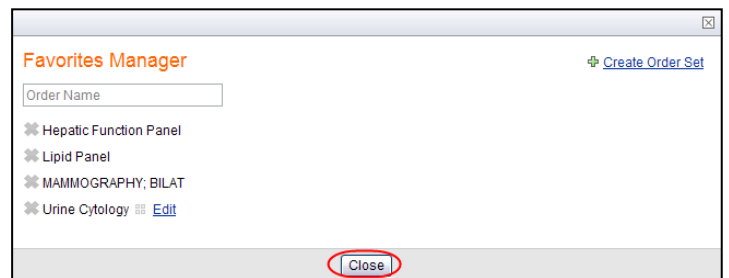
- ✖ Head CT
- ✖ Hepatic Function Panel
- ✖ Lipid Panel
- ✖ MAMMOGRAPHY; BILAT
- ✖ Urine Cytology [Edit](#)

Close

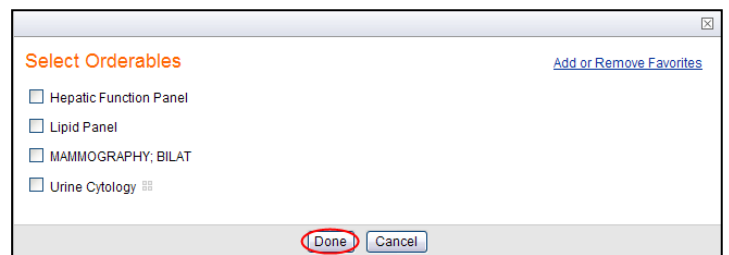
3. Click **OK** to confirm removal of the item or click **Cancel** if you would like the orderable to remain in your list of Favorites.



4. The orderable has been deleted from the Favorites Manager list. Click **Close** to return to the *Select Orderables* screen.



5. Click **Done** to return to the active order form or select an orderable from the remaining items in your Favorites list to enter the selected item into the active order form.



QuickStart

Connected Orders

ORD 1.3 – Review Orders Status

Point Person: Providers and Staff Members

The Order Status area provides Simple and Advanced search features that allow providers and staff to locate and review draft orders and track the status of sent orders. This area also allows members of your practice to monitor order processing; edit, delete, and archive orders as necessary; and print orders for the patient chart.

From the Home page, click the **Orders & Results** or **Orders** tab.

Note: Practices that have both Connected Orders and Results Manager will view the combined 'Orders & Results' tab. Practices that do not have Results Manager enabled view the 'Orders' tab.

By default, Connected Orders displays the **Order Status** area with the Simple Search tab active.

<input type="checkbox"/>	Patient	Order Name	Date Modified	Ordered By	Status
<input type="checkbox"/>	Anna McKnight	Chem23	Aug 28, 2009	Dr. Beth Kieffer	Denied

Simple Search

Simple search allows you to filter displayed orders using the following options:

Practice (dropdown option)

Order Status (Draft, Sent, Archive – dropdown option)

Patient Name

Select one or more of the search criteria above and click **View**. Simple Search displays all matching orders. You may sort columns in the result list by clicking underlined column headers: **Patient**, **Date Modified**, **Ordered By**, and **Status**.

Order action options (Print, Delete, and Archive buttons) are enabled when a checkmark is placed to the left of one or more records in the result list. Actions display as appropriate to the order status selected in the Simple Search dropdown:

Draft Orders: Print and Delete Order Options

Sent Orders: Print, Delete Order, and Archive Options

Archive Order: Print Option Only

To review an individual order, click the order name. The service displays the order, which you can review, edit if necessary, send to the receiving facility, or cancel.

Note: The 'Delete Order' option removes the order from the Status Area queue; however, does not ever delete data. The order will remain in the database indefinitely.

<input type="checkbox"/>	Patient	Order Name	Date Modified	Ordered By	Status
<input type="checkbox"/>	Anna McKnight	Chem23	Aug 28, 2009	Dr. Beth Kieffer	Denied
<input type="checkbox"/>	Amy Martin	MRM CR ELBOW 2 VIEWS, Urine...	2 minutes ago	Dr. Beth Kieffer	Draft
<input type="checkbox"/>	Anna McKnight	MAMMOGRAPHY, BILAT	Aug 21, 2009	Dr. Beth Kieffer	Draft

<input type="checkbox"/>	Patient	Order Name	Date Sent	Ordered By	Status
<input checked="" type="checkbox"/>	Gary Watson	Lipid Panel	Sep 3, 2009	Dr. Beth Kieffer	Overdue
<input type="checkbox"/>	Raymond Stein	MRM CR ELBOW 2 VIEWS	Aug 18, 2009	Dr. Beth Kieffer	Sent to facility
<input type="checkbox"/>	Gary Watson	Chem7	Aug 18, 2009	Dr. Beth Kieffer	Sent to facility

Advanced Search

Advanced search allows you to search for orders using the following options:

Patient Name (Type-ahead Search)

Practice (Dropdown List)

Time Frame (All Dates; Previous Day, Week, Month, or 3 Months – Dropdown List)

Order Status (Draft, Sent, and/or Archive Checkboxes)

Order Type (Laboratory and/or Imaging Checkboxes)

Select one or more of the advanced search criteria above and click **View**. Advanced Search displays all matching orders. You may sort columns in the result list by clicking active column headers: **Patient**, **Date Sent**, **Ordered By**, and **Status**.

On the Advanced Search screen, the **Print** action option is enabled when you place a checkmark the left of one or more records in the result list.

To review an individual order, click the **Order Name**. The service displays the order, which you can review, edit if appropriate, send to the receiving facility, or cancel (see *Order Review* below).

Note: Orders in a status of *Sent to Facility*, *Archived*, or *In progress* may not be edited. Orders in these statuses provide only a Print option. Orders in *Draft* or *Denied* statuses may be edited.

The screenshot shows the 'Advanced Search' tab selected. Search filters include Patient Name, Practice (All Practices), Time frame (All Dates), Order Status (Draft, Sent, Archived), and Order Type (Laboratory, Imaging). A 'View' button is highlighted. Below the filters is a table of search results.

<input type="checkbox"/>	Patient	Order Name	Date Sent	Ordered By	Status
<input type="checkbox"/>	Raymond Stein	MRM CR ELBOW 2 VIEWS	Aug 18, 2009	Dr. Beth Kieffer	Sent to facility
<input type="checkbox"/>	Gary Watson	Chem7	Aug 18, 2009	Dr. Beth Kieffer	Sent to facility
<input type="checkbox"/>	Kelly Martin	Head CT	Aug 18, 2009	Dr. Beth Kieffer	In progress

This screenshot shows the same search results as the previous one, but with the 'Print' button highlighted. The 'Order Name' column is also highlighted. The table of results is as follows:

<input type="checkbox"/>	Patient	Order Name	Date Created	Ordered By	Status
<input checked="" type="checkbox"/>	Phoebe Nicholas	CBC with Diff	Sep 30, 2009	Dr. Beth Kieffer	Sent to facility
<input type="checkbox"/>	Catherine Wallace	INR	Sep 30, 2009	Dr. Beth Kieffer	Sent to facility
<input type="checkbox"/>	Raymond Stein	JN Abdominal ultrasound	Sep 30, 2009	Dr. Beth Kieffer	Sent to facility
<input type="checkbox"/>	Catherine Wallace	JN Abdominal ultrasound	Sep 30, 2009	Dr. Beth Kieffer	Sent to facility

Order Review

Order status determines what actions providers or staff may take on orders in the Order Status area:

Draft – Providers or other authorized staff members may review the order, edit if necessary, and send the order to the laboratory or radiology facility. Click the **Order Name** link to open and review the order.

Note: See ORD 1.1 Creating a Connected Order for information related to editing and sending orders.

Denied – Denied by the receiving facility. Providers or staff may edit the order and resend or cancel the order. Receiving facilities that deny orders will enter a reason for the denial in the order. Click the **Order Name** link to review the order and the reason for denial.

Sent to facility – The order has been transmitted to the facility. In this status, providers and staff may view and print the order, but the order is no longer available for editing. Click the **Order Name** link to open and print the order or follow the instructions below to print the order from the Order Status area.

In progress – The receiving facility has accepted the order. In this status, providers and staff may print the order, but the order is no longer available for editing. Click the **Order Name** link to open and print the order or follow the instructions below to print the order from the Order Status area.

The screenshot shows the 'Order Status' tab selected. It displays a table of orders with columns for Patient, Order Name, Date Created, Ordered By, and Status. The 'Status' column is highlighted.

<input type="checkbox"/>	Patient	Order Name	Date Created	Ordered By	Status
<input type="checkbox"/>	Amy Martin	MRM CR ELBOW 2 VIEWS, Urine...	2 hour(s) ago	Dr. Beth Kieffer	Draft
<input type="checkbox"/>	Anna McKnight	MAMMOGRAPHY, BILAT	Aug 21, 2009	Dr. Beth Kieffer	Draft
<input type="checkbox"/>	Anna McKnight	Chem23	Aug 21, 2009	Dr. Beth Kieffer	Denied
<input type="checkbox"/>	Raymond Stein	MRM CR ELBOW 2 VIEWS	Aug 18, 2009	Dr. Beth Kieffer	Sent to facility
<input type="checkbox"/>	Gary Watson	Chem7	Aug 18, 2009	Dr. Beth Kieffer	Sent to facility
<input type="checkbox"/>	Kelly Martin	Head CT	Aug 18, 2009	Dr. Beth Kieffer	In progress

Print Order(s) from the Order Status Area

1. The print button in the Order Status area is active only if the checkboxes to the left of one or more orders are checked. Select the orders you would like to print, and click **Print**.

Note: To select all orders for printing, click the checkbox to the left of the 'Patient' column header.

Order Status

Simple Search | Advanced Search

Patient: Patient Name
Practice: All Practices
Time frame: All Dates
Order Status: ☒ Draft ☒ Sent ☒ Archived
Order Type: ☒ Laboratory ☒ Imaging

Print Click to Select All

<input type="checkbox"/>	Patient	Order Name	Date Created	Ordered By	Status
<input type="checkbox"/>	Amy Martin	MRM CR ELBOW 2 VIEWS, Urine	2 hour(s) ago	Dr. Beth Kieffer	Draft
<input type="checkbox"/>	Anna McKnight	MAMMOGRAPHY, BILAT	Aug 21, 2009	Dr. Beth Kieffer	Draft
<input type="checkbox"/>	Anna McKnight	Chem23	Aug 21, 2009	Dr. Beth Kieffer	Denied
<input type="checkbox"/>	Raymond Stein	MRM CR ELBOW 2 VIEWS	Aug 18, 2009	Dr. Beth Kieffer	Sent to facility
<input type="checkbox"/>	Gary Watson	Chem7	Aug 18, 2009	Dr. Beth Kieffer	Sent to facility
<input checked="" type="checkbox"/>	Kelly Martin	Head CT	Aug 18, 2009	Dr. Beth Kieffer	In progress

2. The selected order(s) open in a new browser window. Click **Print** to print the order to a local printer or **Close** to close the browser window.

https://app.relayhealth.com/Print.ashx?type=order&mode=viewer&orderid=4819 - Windows Internet Explorer

Print **Close**

Waterside Medical Center
40785 West Waterside Way Suite 101
San Francisco, CA 94102
Phone: 415-555-5555
Fax: 415-555-7878

ORDERING PROVIDER
Physician: Kieffer, Beth - Dr.
Practice: Waterside Medical Center
Address: 40785 West Waterside Way Suite 101
City, State, Zip: San Francisco, CA 94102
Phone Number: 415-555-5555
Fax Number: 415-555-7878

PATIENT INFORMATION
Name: Martin, Kelly
Gender: F
Date of Birth: 03/09/1979
Address: 101 Oak Street
City, State, Zip: Mendocino, CA 95400
Phone Number: (415) 555-1212

INSURANCE INFORMATION
Health Plan Name: Aetna
Policy Holder: Martin, Kelly
Relationship: Self
Subscriber ID: A4567895
Group ID: 98765434
State: CA - California
Employer:

TESTS ORDERED
Test: Head CT
Priority: Stat
Diagnosis Codes: 234.8
Placer Order Number: 11f99844c044827
Laterality: Right
Fasting: No
Specimen Collected: No
Notes:

Authorization - Please sign and date
I hereby authorize the release of medical information related to the services described herein.

Patient Signature _____ Date _____
Physician Signature _____ Date _____

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Print **Close**

Done Trusted sites 100%

ORD 1.4 – Navigating Orders Registration Manager

Point Person: Laboratory and Radiology Facility Users

Orders Registration Manager is used in the Orders Receipt workflow. Facility (i.e., hospital, laboratory, or radiology center) users receive orders in Registration Manager and match patient records (or enter new patients to be sent to the facility's patient registration system) prior to transmitting the order into the facility's systems, denying the order, or re-routing the order. Network Identity Management (NIM) solution allows the Orders application to accurately match or create health system patients – using the customer's own patient identifiers.

This QuickStart describes the process of matching patients to facility records and creating new patient records when necessary. For instructions related to processing orders, please see *QuickStart ORD 1.5: Processing Orders*.

Navigation and Searching

The Registrations tab defaults to the **Orders Registration Manager** view. To review the patient order, select a record from the queue on the left.

You can move up and down the queue using the up/down links, and you can sort the queue by:

- Date Submitted
- Receiving Facility
- Patient Name
- Order Type

Using the Simple Search options, you can search for specific orders by facility or patient name. Advanced Search provides additional search criteria including time frame, ordering practice, patient name, order tag (new, in process, scheduled), and order status (archived and not yet transmitted).

After selecting Simple or Advanced Search criteria, click **View** to view matching orders.

Note: The active record displayed on screen is highlighted in the queue.

Waterside Medical Center

Settings & Administration Help & Training Sign Out
Dr. Beth Kieffer

Home Messages eScript Orders & Results **Registrations** Patients Education

Orders Registration Manager Pre-Registration Manager

Registration Manager Simple Search Advanced Search Print

Waterside Medical Center Patient Name View

Sort by Date Submitted

Gary Watson
Waterside Medical Center
Imaging Requisition
Oct 08, 2009 1:27 PM

Jennifer Fraley
Waterside Medical Center
Imaging Requisition
Oct 08, 2009 1:24 PM

Pat Jones
Waterside Medical Center
Imaging Requisition
Oct 08, 2009 12:55 PM

Anna Reed
Waterside Medical Center
Imaging Requisition
Oct 08, 2009 12:54 PM

Kate Wallace
Waterside Medical Center
Laboratory Requisition
Oct 08, 2009 12:46 PM

Down

Total Results: 14

Transmit Data Deny Order Archive Order Re-route Order

Order Status: A patient visit record must be created in your accounting system before clicking the Transmit Data button.

Patient Information
Gary Watson
Gender: Male DOB: January 01, 1967 Age: 42

Administrative Notes
☒ New ☐ In process ☐ Scheduled
Add Note

Order Details
ULTRASOUND PELVIC SCAN - Medical
Orderable Code: Medical 21 Priority: Routine
Diagnosis Codes: 793.2 Placer Order Number: 02a6aacb0812830
Fasting: No Laterality: Bilateral
Specimen Collected: No
Notes:

Ordering Provider
Name: Dr. Beth Kieffer Specialty: Family Medicine
Phone: 415-556-1212 Fax: 1-415-556-1213
Address: 101 Waterside Avenue San Francisco CA 94102

Audit Trail
Transmit Data Deny Order Archive Order Re-route Order

Registration Manager Simple Search Advanced Search Print

Time Frame All Dates

Ordering Practice All Practices

Patients Patient Name

Tags ☐ New ☐ In process ☐ Scheduled

Additional Options ☐ Archived ☐ Not Yet Transmitted

View Cancel

ORD 1.5 – Understanding Order States

Point Person: Laboratory and Radiology Facility Users

An order received in the Orders Registration Manager can have different states, and each order state guides facility users towards an action (i.e., create new patient record, resolve duplicate, transmit order, etc.). Order states displayed for your facility may be dependent upon the deployment method at your organization (integrated versus non-integrated). The order state displays in the **Order Status** area.

At this time, orders within the Orders Registration Manager can be in the following states:

1. Reconcile Patient (i.e., matches found)
2. Create New Patient (i.e., no matches found)
3. Ready to Transmit
4. Transmitted - Pending
5. Transmitted - Confirmed
6. Denied
7. Cancelled

The screenshot shows the 'Orders Registration Manager' interface. At the top, there are tabs for 'Orders Registration Manager' and 'Pre-Registration Manager'. Below the tabs, there's a search bar with 'Waterside Medical Center' and a 'Patient Name' field. A 'View' button is next to it. Below the search bar, there's a 'Sort by Patient Name' dropdown. The main content area is divided into two sections. The left section lists two patients: 'Anna McKnight' and 'Anna Reed'. The right section shows the details for 'Anna McKnight', including 'Gender: Female', 'DOB: May 07, 1957', and 'Age: 52'. The 'Order Status' section is highlighted with a red circle and contains the text 'Create New Patient Record'. Below this, there's a 'Patient Information' section and an 'Administrative Notes' section with 'New' and 'In process' options.

Each order state has different attributes as detailed below. These attributes (i.e., messages and order sections displayed, enabled/disabled action buttons, etc.) guide facility users through receiving and processing orders.

1. Reconcile Patient State

- An order is in this state when one or more potential patient matches are found. Facility users will reconcile the potential matches before transmitting or otherwise processing the order.
- The Order Status section displays the following message: **"Order Status: Resolve Patient Record."**
- Only the Patient Information, Administrative Notes, Order Details, and Audit Trail sections of the order are available.
- The Transmit and Archive buttons are disabled and the Deny button is enabled.
- The Administrative Notes section is active.

2. Create New Patient State (Health System Integration Enabled)

- An order is in this state when no potential patient matches are found and integration is enabled.
- The Order Status section displays the following message: **"Order Status: Create New Patient Record."**
- Only the Patient Information, Administrative Notes, Order Details, and Audit Trail sections of the order are available.
- The Transmit and Archive buttons are disabled and the Deny button is enabled.
- The Administrative Notes section is active.

2. Create New Patient State (Health System Integration Disabled)

- An order is in this state when no potential patient matches are found for the order and integration is disabled.
- The Order Status section displays the message: **"Order Status: A patient visit record must be created in your accounting system before clicking the Transmit Data button."**
- All sections of the order (Patient Information, Administrative Notes, etc.) are available and displayed.
- The Deny and Transmit buttons are enabled and the Archive button is disabled.
- The Administrative Notes section is active.

3. Ready to Transmit State

- An order moves to the 'Ready to Transmit' state after any of the following:

- The user has completed the workflow in the Reconcile Patient State. The Order Status section displays the message: "**Order Status: *This patient has been matched to an existing patient record. You may transmit the order at any time.***"
- A user has completed the workflow in the Create New Patient State (Health Plan Integration Only). The Order Status section displays the message: "**Order Status: *This patient is a new patient. You may transmit the registration request and the order at any time.***" Note: This message will never display in the non-integrated mode because the Create Patient flow is not applicable in that configuration.
- An order has been placed for a patient that is already linked in the NIM. The Order Status section displays the message: "**Order Status: *This patient has been matched to an existing patient record. You may transmit the order at any time.***"
- All of the order sections - Patient Information, Administrative Notes, Order Details, Additional Patient Information, and Audit Trail are available.
- The Deny and Transmit buttons are enabled and the Archive button is disabled.

4. Transmitted - Pending State (Health System Integration **Enabled**)

- An order moves to this state after the user has gone through the Transmit Data flow in the HIS integrated model only. Transmitted Pending State does not apply to the non-integrated model.
- All of the order sections - Patient Information, Administrative Notes, Order Details, Additional Patient Information, and Audit Trail are available.
- The Deny, Transmit, and Archive buttons are inactive.
- The service displays the following message: "**Order Status: *Transmitted - Waiting for confirmation.***"

5. Transmitted - Confirmed State (Health System Integration **Enabled**)

- An order moves to this state after the user has gone through the Transmit Data flow in the HIS integrated model.
- All of the order sections - Patient Information, Administrative Notes, Order Details, Additional Patient Information, and Audit Trail are available.
- The Deny and Transmit buttons are disabled and the Archive button is enabled.
- The service displays the following message: "**Order Status: *Transmitted -- Confirmed.***"

5. Transmitted - Confirmed State (Health System Integration **Disabled**)

- An order moves to this state after the user has gone through the Transmit Data flow in the non-integrated model
- All of the order sections - Patient Information, Administrative Notes, Order Details, Additional Patient Information, and Audit Trail are available.
- The Deny and Transmit buttons are disabled and the Archive button is enabled.
- The service displays the following message: "**Order Status: *Transmitted.***"

6. Denied State

- An order moves to this state after a user has gone through the Denial flow.
- All of the sections - Patient Information, Administrative Notes, Order Details, Additional Patient Information, and Audit Trail are available.
- The Deny and Transmit buttons are disabled and the Archive button is enabled.
- The service displays the following message: "**Order Status: *Denied by <First Name> <Last Name> on <denied date>.***"

7. Cancelled State

- An order moves to this state after an ordering practice has cancelled the order.
- All of the order sections - Patient Information, Administrative Notes, Order Details, Additional Patient Information, and Audit Trail are available.
- The Deny, Transmit, and Archive buttons are inactive.
- The service displays a message that informs the user the order was cancelled by the ordering practice.

ORD 1.6 – Matching Patients and Processing Orders

Point Person: Laboratory and Radiology Facility Users

Connected Orders provides an efficient workflow for laboratory and radiology facility users to manage orders sent by a physician practice. Depending upon the deployment (integrated versus non-integrated) at the facility, users may view orders in various states as described previously in QuickStart ORD: 1.4: *Understanding Order States*.

In general, facility users perform three types of actions on an imaging or laboratory requisition. If necessary, reconcile the patient record with an existing patient record in the facility system or create a new patient record in the facility's system. Next, facility users can use the *Administrative Notes* section to tag an order in the queue (New, In process, Scheduled) and enter any notes appropriate to the order. Finally, facility users may act on the order by transmitting, denying, archiving, or re-routing the order to an alternate facility.

This QuickStart describes actions facility users will take in response to Order Status messages as well as transmit, deny, archive, and re-routing features provided in Orders Registration Manager. Where appropriate, descriptions in this QuickStart indicate integrated versus non-integrated models.

Reconcile Patient – Integrated & Non-Integrated Models

- When the service identifies one or more potential patient matches, the Order Status displays the following message: *"Resolve Patient Record."* Click **Resolve Patient Record** to view potential matches.

The screenshot shows the 'Registration Manager' window. At the top, there are tabs for 'Simple Search' and 'Advanced Search'. Below them is a search bar with 'Waterside Medical Center' selected. To the right is a 'Patient Name' field and a 'View' button. Below the search bar is a list of potential matches. The first match is 'Kevin Lane' from 'Waterside Medical Center' with a 'Laboratory Requisition' dated 'Oct 08, 2009 12:37 PM'. The 'Order Status' is 'Resolve Patient Record', which is circled in red. To the right of the list is a section for 'Patient Information' showing 'Kevin Lane' with 'Gender: Male', 'DOB: February 11, 1934', and 'Age: 75'. Below that is an 'Administrative Notes' section with radio buttons for 'New' and 'In process'.

- The service displays patient information from the order received as well as potential matching records. Review the potential matches and:

Check the box to the left of the record you wish to select and click **Confirm Record Match**.

OR

Click **No Record Matches**.

OR

Click **Cancel** to close the Potential Match pop in.

If you selected 'No Matched Records,' and the facility has integration enabled, the service changes the order state to: *Create New Patient*, and the Create New Patient pop in displays. Refer to 'Transmit Data' instructions for integrated deployment below.

OR

If you selected 'Confirm Record Match,' the service changes the order state to: *This patient has been matched to an existing patient record. You may transmit the order at any time.* Refer to 'Transmit Data' instructions for integrated or non-integrated deployment models below (as appropriate for your facility).

The screenshot shows a dialog box titled 'Waterside Medical Center Data - Potential Match'. It contains two main sections: 'Patient Information from Order' and 'Potential Record Match - Select to Confirm'. The 'Patient Information from Order' section shows 'First Name: Kevin L', 'Last Name: Lane', 'DOB: Feb 11, 1934', 'Gender: Male', 'Address: No Address', 'Provider: Carson, Fujikawa', and 'Practice: Sunnyside Family'. The 'Potential Record Match - Select to Confirm' section shows a list of potential matches. The first match is 'First Name: Kevin L', 'Last Name: Lane', 'DOB: Feb 11, 1934', 'Gender: Male', 'Phone: (342) 837-3937', 'Address: 42330 Converse Rd, Laney, ID 94820', 'MRN (Facility): 983983983983', 'HNE: 3938937181', 'Account #: 3837494', and 'Last Visit Date: Jun 13, 1983'. The checkbox next to this match is checked. At the bottom of the dialog box, there are three buttons: 'No Matched Records', 'Confirm Record Match', and 'Cancel', all of which are circled in red.

Transmit Order – Integrated Model

- If the service displays the following Order Status: *"This patient has been matched to an existing patient record."*

You may transmit the order at any time," you can simply add a tag under Administrative Notes and Transmit the order (skip to step 3 below to view a description of tagging and internal notes).

OR

If no potential matches are found in an integrated deployment model, the service displays the following message: "Order Status: Create New Patient Record." To create the new patient record, click **Create New Patient Record**.

Note: Because the patient record does not yet exist in the facility system when the Order Status displays 'Create New Patient Record,' the Transmit Data and Archive Order buttons are disabled.

Registration Manager

Simple Search | Advanced Search | Print

Waterside Medical Center | Patient Name | View

Sort By Receiving Facility

James Anderson
Waterside Medical Center
Laboratory Requisition
Sep 14, 2009 8:06 AM

Phoebe Nicholas
Waterside Medical Center
Laboratory Requisition
Sep 17, 2009 1:47 PM

Catherine Wallace
Waterside Medical Center
Laboratory Requisition
Sep 30, 2009 2:48 PM

Phoebe Nicholas
Waterside Medical Center
Laboratory Requisition
Sep 30, 2009 2:49 PM

Christina Washington
Waterside Medical Center
Laboratory Requisition
Oct 08, 2009 11:51 AM

Up | Down

Total Results: 14

Transmit Data | Deny Order | Archive Order | Re-route Order

Order Status: Create New Patient Record

▼ Patient Information
Phoebe K. Nicholas
Gender: Female | DOB: July 14, 1927 | Age: 82

▼ Administrative Notes
☒ New ☐ In process
Add Note

▼ Order Details
CBC with Diff - Medical
Orderable Code: Medical 2 | Priority: Routine
Diagnosis Codes: 480.9 | Placer Order Number: 2712eca41ce9188
Fasting: No
Specimen Collected: No
Notes:
Ordering Provider

- On the *Create Patient* screen, enter all required information and click **Done**.

Create Patient

Personal Information
First Name * Phoebe | Date of Birth * 07/14/1927
Middle Name K | Gender * ☐ Male ☒ Female
Last Name * Nicholas

Contact Information
Address 100 Saybrook Change Road | Home Number (415) 555-6666
City Middletown | Work Number () - -
State CA - California | Mobile Number () - -
Zip Code * 94118 | Email Address phoebe.nicholas@yahoo.com

Registration Information
Ordering Provider Dr. Beth Kieffer at Waterside Medical Center

Done **Cancel**

- The Order Status message now displays: *This patient is a new patient. You may transmit the registration and the order at any time.* In the Administrative Notes section, select from the radio buttons to add a tag to the order. You may optionally add notes to the order using the text box in the Administrative Notes section as well.

Note: Tags allow facility users to perform Advanced Searches for orders using 'order tag' criteria. Additionally, tags provide visual indicators in the queue, which allow users to rapidly scan the queue and evaluate order processing. For example, orders that have an 'in process' tag will display with a red circle in the queue and orders with a 'scheduled' tag display with a yellow circle. The default tag is New, which does not display an icon in the queue. Laboratory orders include New and In process tags only. Imaging orders include an additional 'Scheduled' tag option.

Tag icons display in the queue when facility users select criteria for a Simple or Advanced search, resort the queue, or refresh the screen.

Registration Manager

Simple Search | Advanced Search | Print

Waterside Medical Center | Patient Name | View

Sort By Receiving Facility

James Anderson
Waterside Medical Center
Laboratory Requisition
Sep 14, 2009 8:06 AM

Phoebe Nicholas
Waterside Medical Center
Laboratory Requisition
Sep 17, 2009 1:47 PM

Catherine Wallace
Waterside Medical Center
Laboratory Requisition
Sep 30, 2009 2:48 PM

Phoebe Nicholas
Waterside Medical Center
Laboratory Requisition
Sep 30, 2009 2:49 PM

Christina Washington
Waterside Medical Center
Laboratory Requisition
Oct 08, 2009 11:51 AM

Up | Down

Total Results: 14

Transmit Data | Deny Order | Archive Order | Re-route Order

Order Status: This patient is a new patient. You may transmit the registration request and the order at any time.

▼ Patient Information
Phoebe K. Nicholas
Gender: Female | DOB: July 14, 1927 | Age: 82

▼ Administrative Notes
☒ New ☐ In process
Add Note

▼ Order Details
CBC with Diff - Medical
Orderable Code: Medical 2 | Priority: Routine
Diagnosis Codes: 480.9 | Placer Order Number: 2712eca41ce9188
Fasting: No
Specimen Collected: No
Notes:
Ordering Provider
Name: Dr. Beth Kieffer | Specialty: Family Medicine

- Click **Transmit Data** to transmit the registration and the order into the facility's laboratory or radiology system.

The screenshot shows the 'Registration Manager' interface. On the left, a list of patients is displayed, including James Anderson, Phoebe Nicholas, and Catherine Wallace. On the right, the details for Phoebe K. Nicholas are shown, including her gender (Female), DOB (July 14, 1927), and age (82). The 'Transmit Data' button is highlighted with a red circle.

- The *Transmit Data* pop in displays. The Order Information section defaults to the current date and time. You may optionally adjust these entries if necessary by clicking on the date or time fields, then click **Transmit Data**.

The screenshot shows the 'Transmit Data' pop-up window. It contains a message: 'The following data can be transmitted to your hospital information system. Please confirm the information you would like to submit and click "transmit data".' Below this, the 'Order Information' section shows the 'Scheduled Date' as 10/19/2009 and the 'Scheduled Time' as 2:10 PM. The 'Transmit Data' button is highlighted with a red circle.

- The Order Status message now displays: *Transmitted – Waiting for confirmation*. Click **Refresh Status** at any time to refresh the order status.

The screenshot shows the 'Registration Manager' interface. The 'Order Status' message now displays: 'Transmitted – Waiting for confirmation. Refresh Status'. A red arrow points to the 'Refresh Status' link.

Transmit Order – Non-integrated Model

- When no potential patient matches are found in a non-integrated deployment model, the service displays the following message: "Order Status: A patient visit record must be created in your accounting system before clicking the Transmit Data button." After creating the new patient record in the facility's accounting system, click **Transmit Data**.

The screenshot shows the 'Registration Manager' interface. The 'Order Status' message now displays: 'Order Status: A patient visit record must be created in your accounting system before clicking the Transmit Data button.' The 'Transmit Data' button is highlighted with a red circle.

- The service presents the *Transmit Data* pop in. On this screen, enter the **HNE**, **MRN**, and/or **Account Number** as applicable.

Note: All fields in the pop in are required. If the HNE and MRN for the patient are already known, the fields are pre-populated.

- Click **Transmit Data**.

The screenshot shows a 'Transmit Data' window with a title bar and a close button. Below the title is a yellow instruction box: 'The following data can be transmitted to your hospital information system. Please confirm the information you would like to submit and click "transmit data".' Underneath is a section titled 'Account Information' containing a table with input fields for HNE (2345), MRN (234446), Account Number (1234-5678), Scheduled Date (10/19/2009), and Scheduled Time (11:57 AM). At the bottom, there are two buttons: 'Transmit Data' and 'Cancel', both of which are circled in red.

- The Order Status moves to *Transmitted – Confirmed*. Because the order has been transmitted, the Transmit Data, Deny Order, and Re-route Order buttons are now disabled.

To add a tag and/or notes to this order, use the radio buttons and text box provided in the *Administrative Notes* section.

Note: Tags allow facility users to perform *Advanced Searches* for orders using 'order tag' criteria. Additionally, tags provide visual indicators in the queue, which allow users to rapidly scan the queue and evaluate order processing. For example, orders that have an 'in process' tag will display with a red circle in the queue and orders with a 'scheduled' tag display with a yellow circle. The default tag is *New*, which does not display an icon in the queue. Laboratory orders include *New* and *In process* tags only. Imaging orders include an additional 'Scheduled' tag option.

Tag icons display in the queue when facility users select criteria for a Simple or Advanced search, resort the queue, or refresh the screen.

The screenshot shows the 'Registration Manager' interface. On the left is a list of orders with a search bar and 'Sort by Date Submitted' dropdown. The main area has tabs for 'Transmit Data', 'Deny Order', 'Archive Order', and 'Re-route Order'. The 'Order Status' is 'Transmitted - Confirmed', indicated by a red arrow. Below this is the 'Patient Information' section for 'Pat Jones' (DOB: 10/10/1967, Age: 42). The 'Administrative Notes' section has radio buttons for 'New' (selected), 'In process', and 'Scheduled' (circled in red). There is a text box for notes and an 'Add Note' link. The 'Order Details' section shows 'MAMMOGRAPHY; UNILAT - Medical' with various codes and a 'Priority: Routine'.

- You may optionally **Archive Order** at this time or move to another order in the queue. Once an order has been transmitted, it will automatically archive in 24 hours.

This screenshot is identical to the previous one, but the 'Archive Order' button in the top navigation bar is circled in red, indicating the next step in the process.

Deny Order

1. If it is necessary to deny an order, facility users can accomplish this action with just a few clicks. After reviewing the order details, click **Deny Order**.

Note: It is not necessary to create or resolve patient records in the facility system prior to denying an order.

The screenshot shows the 'Registration Manager' application. At the top, there are tabs for 'Simple Search' and 'Advanced Search'. Below these is a search bar with 'Waterside Medical Center' selected. A list of orders is shown on the left, with 'Paul Anderson' selected. The main panel displays the details for Paul Anderson's order. The 'Deny Order' button is highlighted with a red circle. Other buttons include 'Transmit Data', 'Archive Order', and 'Re-route Order'. The 'Order Status' section indicates that a patient visit record must be created before clicking 'Transmit Data'. The 'Patient Information' section shows Paul Anderson's details. The 'Administrative Notes' section has radio buttons for 'New', 'In process', and 'Scheduled'. The 'Order Details' section shows 'Head CT - Medical'.

2. The *Deny Order* pop in displays. Use the radio buttons to indicate the reason for the denial and the *Additional Notes* text box to enter any comments to the ordering physician. Click **OK**.

The screenshot shows the 'Deny Order' dialog box. It prompts the user to indicate a reason for denial. The radio buttons are: 'Patient Never Arrived', 'Patient Not Covered', 'Need Additional Information' (selected), and 'Other'. The 'Additional Notes' text box is highlighted with a red circle. The 'OK' button is also highlighted with a red circle. The 'Cancel' button is visible next to it.

3. The Order Status now displays: *Denied by <user name> on <date, time>*. Additionally, the Administrative Notes section now includes the denial reason and any comments.
4. You may optionally archive the order to remove it from the queue. Click **Archive Order**. Denied orders will automatically archive after 7 days.

The screenshot shows the 'Registration Manager' application. The 'Archive Order' button is highlighted with a red circle. The 'Order Status' section now displays 'Denied by Karen Moore on 10/19/2009 2:34:10 PM'. The 'Administrative Notes' section now includes the denial reason and any comments. The 'Order Details' section shows 'Head CT - Medical'.

5. The Archive Order button is now marked with a green (completed) checkmark and all order action buttons are disabled. The order displays in a grey front in the queue; however, it is accessible for review if necessary.

The screenshot shows the 'Registration Manager' application. The 'Archive Order' button is now marked with a green checkmark. The 'Order Status' section displays 'Denied by Karen Moore on 10/19/2009 2:34:10 PM'. The 'Administrative Notes' section includes the denial reason and any comments. The 'Order Details' section shows 'Head CT - Medical'.

Re-route Order

1. Facility users may occasionally need to re-route orders to an alternate facility. Click **Re-route Order**.

The screenshot shows the 'Registration Manager' interface. At the top, there are tabs for 'Simple Search' and 'Advanced Search'. Below these is a search bar with 'Waterside Medical Center' selected and a 'View' button. A 'Sort By Receiving Facility' dropdown is also present. A list of patients is shown on the left, with 'Gary Watson' highlighted. The main area displays patient information for Gary Watson (DOB: January 01, 1967, Age: 42) and administrative notes. The 'Order Details' section shows an 'ULTRASOUND PELVIC SCAN - Medical' order with codes and dates. The 'Re-route Order' button is circled in red.

2. In the *Select a Facility* pop in, highlight and click the alternate facility from the pop in box or click **Close** to close the box. You may optionally view details of listed facilities (i.e., address, phone, fax number, patient service centers information) by clicking the **View Details** link.

The screenshot shows a 'Select a Facility' pop-up window. It lists two facilities: 'Waterside Medical Center' and 'JNan Facility'. The 'JNan Facility' row is highlighted, and its 'View Details' link is circled in red. A mouse cursor is pointing at the 'Close' button at the bottom right.

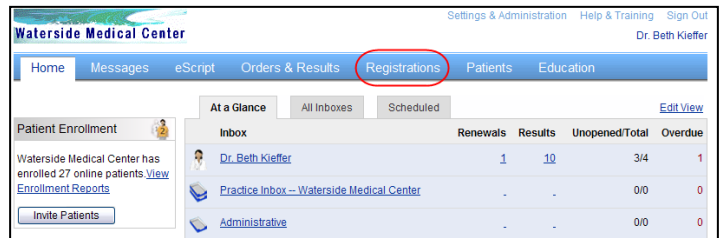
3. The *Order Re-routed* pop in confirms the order has been re-routed to the selected facility. The order has also been removed from the queue.

The screenshot shows an 'Order Re-routed' pop-up window. It contains the text 'This order has been re-routed.' and an 'OK' button at the bottom right, which is circled in red.

ORD 1.7 – Printing Individual or Batch Orders

Point Person: Laboratory and Radiology Facility Users

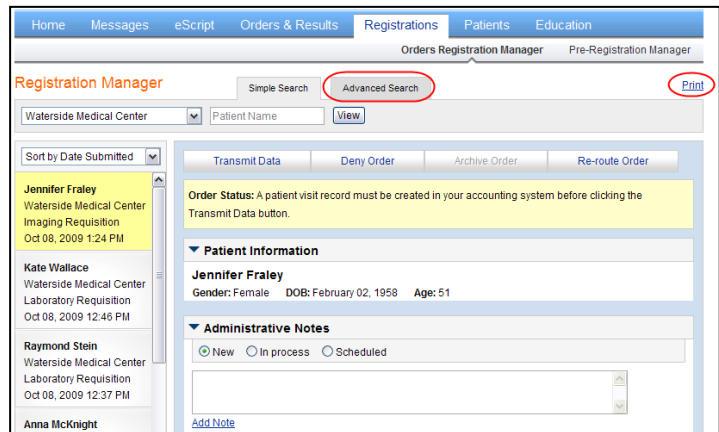
1. From the Home page, click the **Registrations** tab.



2. **Orders Registration Manager** displays. To print results from the current queue display, click **Print**.

OR

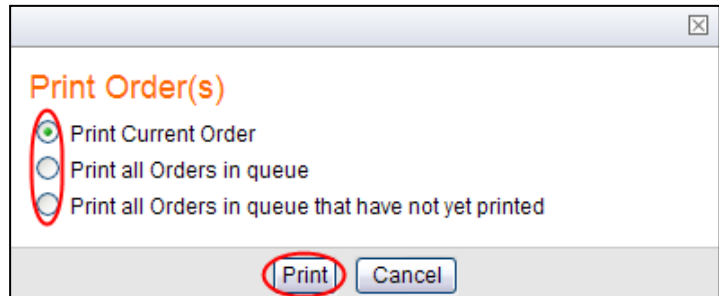
To filter the contents of the Orders Registration Manager queue (for example, by time frame, practice, order tag, etc.), click the **Advanced Search** tab. On the **Advanced Search** tab, use the drop-down, radio button, check box, and free-text options to enter the criteria by which you wish to filter the queue and click **View**, then click **Print**.



3. In the Print Orders pop in, use the radio buttons to select a print range:

- Print Current Order (prints the order currently displayed on screen)
- Print all Orders In queue (batch print)
- Print all Orders in queue that have not yet printed (batch print).

4. Click **Print**.



- | <div style="display: flex; justify-content: space-around; align-items: center;"> Print Close </div> | |
|--|-------------------------------|
| Waterside Medical Center
40785 West Waterside Way Suite 101
Emeryville, CA 94102
Phone: 415-556-5050
Fax: 415-556-7878 | |
| ORDERING PROVIDER
Physician: Kieffer, Beth - Dr.
Practice: Waterside Medical Center
Address: 40785 West Waterside Way Suite 101
City, State, Zip: Emeryville, CA 94102
Phone Number: 415-556-5050
Fax Number: 415-556-7878 | |
| PATIENT INFORMATION
Name: Fraley, Jennifer
Gender: F
Date of Birth: 02/02/1958
Address:
City, State, Zip:
Phone Number:
Work Phone:
Mobile Phone:
Email: | |
| INSURANCE INFORMATION
Health Plan Name: Blue Cross of California PPO
Policy Holder: Fraley, Jennifer
Relationship: Self
Subscriber ID: 765438765
Group ID:
State: CA - California
Employer: | |
| TESTS ORDERED
Test: Medical 22 - ULTRASOUND, OBSTETRIC, EXTENSIVE - Medical
Priority: Routine
Diagnosis Codes: C42.2
Placer Order Number: 9e338a4f5312829
Laterality: Bilateral
Fasting: No
Specimen Collected: No
Notes: | |
| Authorization - Please sign and date
I hereby authorize the release of medical information related to the services described herein. | |
| _____
Patient Signature | _____
Date |
| _____
<i>Beth Kieffer MD</i>
Physician Signature | _____
Oct 08, 2009
Date |
- Powered by **RelayHealth**

Appendix A: Connected Orders FAQs

Can I copy another provider on the results of the order?

Yes. In the Connected Orders creation workflow, you have the option to enter a CC provider. Use the type-ahead search feature in the **Send Results To** field to search for the provider's name. At this time, you can CC providers only within the same health system as the ordering provider.

How does the orderable Favorites feature work?

You can save an unlimited number of individual orderables or create order sets for commonly grouped tests you often order. When selecting an orderable, click **Favorites** to review your list and select an orderable with a single click. To add an orderable or build a set, first click **Favorites** then click **Add or Remove Favorites in the top right of the pop-in box**.

Can multiple providers share the same Favorites list?

No. Favorites lists are saved and displayed based on the logged-in provider or staff member. This allows each provider or staff member to have a unique list of favorites.

How do I delete a Favorite?

In the order creation process, click the **Favorites** button. Then, click **Add or Remove Favorites**. Hover your mouse over the orderable and click the red X to remove the item from your Favorites list.

I want to send the order to a different facility than the one displayed.

Click the "Change Facility" link and select from the facility list.

How do I track order activity?

In the Order Status area, you can search for and review the status of orders created in your organization. The Order Status area defaults to Simple Search view. Advanced Search view allows providers and staff to select orders by multiple criteria including Patient, Practice, Time Frame, Order Status (Draft, Sent, Archived), and Order Type. This area of the Connected Orders feature also allows providers and staff to take actions against existing orders. For example, in the Order Status area, you may view, cancel, delete, or print orders.

Can I delay sending an order?

Yes. To delay sending an order, use the **Save as Draft** option. Draft orders allow designated members of your practice to review orders before transmitting to the facility. You can easily locate the draft orders using the Simple or Advanced Search features provided in the Order Status area of the application.