Standardizing your Enterprise Build

… and how it benefits larger organizations

March 14, 2014

Enabling physician groups to realize the full potential of Electronic Health Records
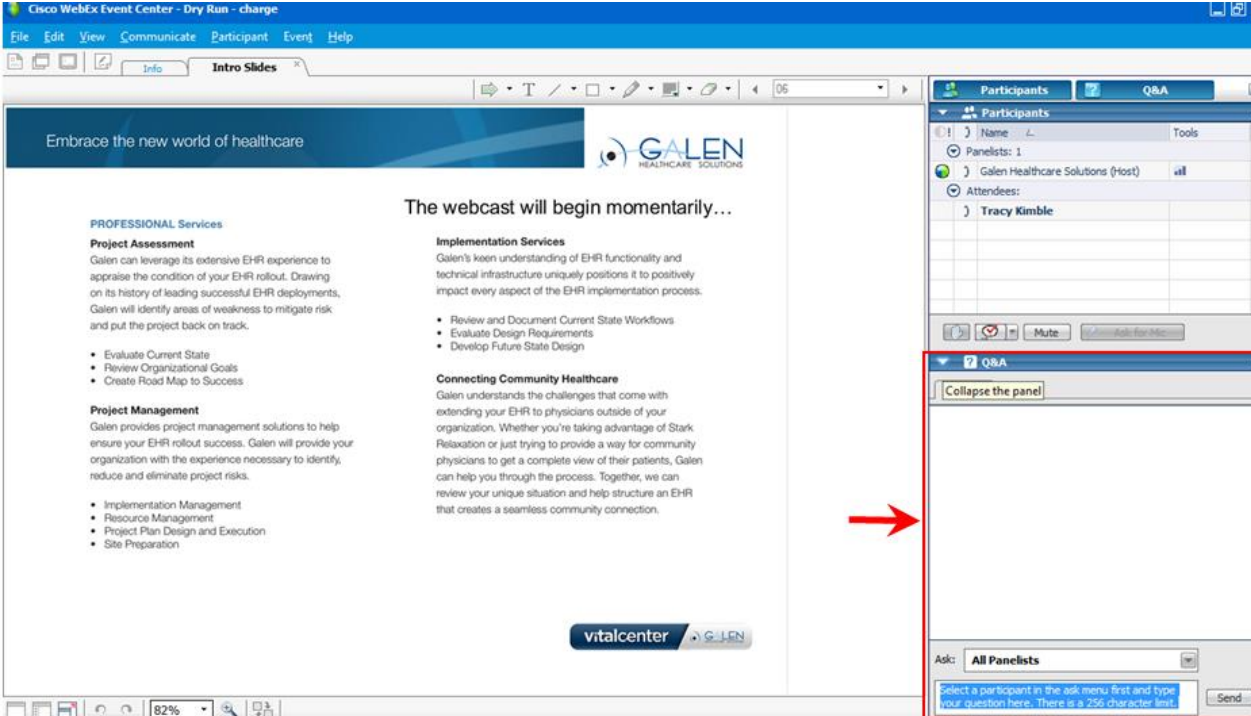
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What We Will Discuss Today

- **What is standardization of the build?**

- **Why larger organizations should standardize**

- **How to standardize your build**

- **Q & A**

What is Standardization?

Role Based

- Each role in the clinic is set up as
 a role in the EHR

- Improves maintenance

- Helps streamline build effort and
 standardizes work for build analysts

What is Standardization?

Tools needed to perform job

- Configuration Workbook (BAW)
    - Example will be provided on the Galen wiki (link on last slide)

- User Matrix

- Naming Convention
    - Use your Org's initials or acronym
    - Distinguish your Org's items from TouchWorks delivered items

- Standardized workflows

Why Larger Organizations Should Standardize

Without a standardized build:

- Poor adoption

- Shaky role-outs

- EHR team cannot support as easily

- Slow system performance

- Patient safety risks

- Executives facing fines
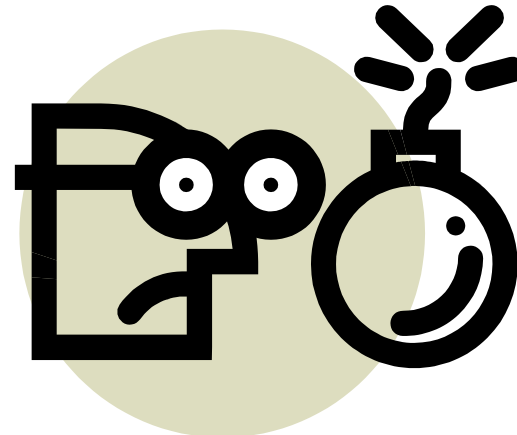
Why Larger Organizations Should Standardize

With a standard build:

- Seamless go-lives

- Easy for EHR team to support users and address issues

- Better user adoption

- Improves system performance

- Minimizes patient safety risks

How To Standardize Your Build

Defining Roles:

- Most important step of standardizing

- Roles will determine what workplace, preferences, task lists and worklists each user will have

- Not always a 1-1 job title to role ratio
  - Multiple job titles can be classified under one "role"
  - Example: Radiology techs I & II, phlebotomists, etc… can be classified into an "Ancillary" or "Clinical Tech" role.

How To Standardize Your Build

Authority Levels:

- Needed to restrict and ensure proper documentation and sign off

- Will be important for limiting which users can place certain orders or start and/or sign off on certain notes

- Its also important to set these levels on the notes and orders themselves

Example of authority levels on Notes:
- Progress Note (8)
- Nurses Note (5)
- Telephone Note (1)

How To Standardize Your Build

Authority Levels - User Matrix:

User Roles	Billing	Medical Records	Front Desk / Secretary	MA / CNA	RN / LPN	Provider	NP	PA	Site Admin	Ancillary	Nutritionist / Social Worker / Counselor	View Only	Help Desk	App Admin
Authority Levels (1-10)														
Ownership Authority	1	1	1	1	5	8	8	8	1	1	5	0	0	8
Finalization Authority	1	1	1	2	5	8	6	6	1	1	5	0	0	8
Ordering Authority	1	1	1	1	5	8	8	8	1	1	5	0	0	8

How To Standardize Your Build

Menu/Workplace:

- Built according to defined roles and job duties
    - A 1-1 menu to role ratio is not necessarily best practice
    - Example: Although Providers, NPs, PAs, Residents, and Fellows may have different authority levels, task lists, and worklists, thus the need for all being distinct roles – they can all use a Provider workplace.

- A good place to start is with the TW delivered menus but if you deem any changes necessary it is advised to build your own using your organizations naming convention as noted earlier
    - Copy and rename

How To Standardize Your Build

Menu/Workplace - User Matrix:

User Roles	Billing	Medical Records	Front Desk / Secretary	MA / CNA	RN / LPN	Provider	NP	PA	Site Admin	Ancillary	Nutritionist / Social Worker / Counselor	View Only	Help Desk	App Admin
Menu / Workplace														
GHS_ProviderWP						x	x	x						
GHS_ClinicalStaffWp				x	x					x	x			
GHS_ClericalWP	x	x	x											
GHS_ClinicSpvrWP											x			
GHS_AppAdmin											·			x
GHS_HelpDeskWP													x	
GHS_ViewOnlyWP												x		

How To Standardize Your Build

Security Classifications:

- Should be built according to defined roles and what your organization allows each role to do
    - 1:1 security classification to role ratio isn't always necessary but is usually the case

- It's a good idea to start with the Allscripts delivered content before deciding to build new classifications. If modifications need to be made it is recommended to create new classifications specific to your organization using your naming convention
    - NOTE: do not edit the TW delivered classifications

How To Standardize Your Build

Security Classifications - User Matrix:

User Roles	Billing	Medical Records	Front Desk / Secretary	MA / CNA	RN / LPN	Provider	NP	PA	Site Admin	Ancillary	Nutritionist / Social Worker / Counselor	View Only	Help Desk	App Admin
Security Classifications														
GHS_Front Desk	x	x	x											
GHS_Medical Assistant				x							x			
GHS_Provider						x								
GHS_Nurse Practitioner							x							
GHS_Physician Assistant								x						
GHS_Registered Nurse/ GHS_LPN					x									
GHS_Site Administrator									x					
GHS_Ancillary										x				
GHS_View Only												x		
GHS_HelpDesk													x	
GHS_AppAdmin														x

How To Standardize Your Build

Clinical Desktop Views:

- Define the standard view every role will use as a default
    - Usually 'Adult Patient View'

- Other clinical desktop views can be assigned/built based on role or specialty
    - Examples: biller/coder view, clinical supervisor view, pediatrics view, cardiology view, OB/GYN view

How To Standardize Your Build

Clinical Desktop Views - User Matrix:

User Roles	Billing	Medical Records	Front Desk / Secretary	MA / CNA	RN / LPN	Provider	NP	PA	Site Admin	Ancillary	Nutritionist / Social Worker / Counselor	View Only	Help Desk	App Admin
Clinical Desktop Views														
Adult Patient View(2)	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT		DEFAULT	DEFAULT
Pediatric Patient View(2)	x	x	x	x	x	x	x	x	x	x	x		x	x
Worklist View	x	x	x	x	x	x	x	x	x	x	x		x	x
Note			x	x	x	x	x	x	x		x		x	x
Clinic Spvr Patient View										x			x	x
Clinical Staff View				x	x					x			x	x
Billing View	x												x	x
View Only Patient View												DEFAULT	x	x

How To Standardize Your Build

ChartViewer Views:

- Decide which views your Org would like to be able to filter upon and see

- Decide upon a default view for all roles

- Assign those views to every role

- Views can be built by specialty to only show contents specific to that specialty
    - Example: Cardiology will show Cardiology notes first

How To Standardize Your Build

ChartViewer Views – User Matrix:

User Roles	Billing	Medical Records	Front Desk / Secretary	MA / CNA	RN / LPN	Provider	NP	PA	Site Admin	Ancillary	Nutritionist / Social Worker / Counselor	View Only	Help Desk	App Admin
ChartViewer Views														
All by Encounter	x	x	x	x	x	x	x	x	x	x	x	x	x	x
All by Owner	x	x	x	x	x	x	x	x	x	x	x	x	x	x
All by Owner by Encounter	x	x	x	x	x	x	x	x	x	x	x	x	x	x
All by Problem	x	x	x	x	x	x	x	x	x	x	x	x	x	x
All by Problem by Encounter	x	x	x	x	x	x	x	x	x	x	x	x	x	x
All by Section by Sub-Section	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT
All by Specialty	x	x	x	x	x	x	x	x	x	x	x	x	x	x
All Encounter Forms	x	x	x	x	x	x	x	x	x	x	x	x	x	x
All Items	x	x	x	x	x	x	x	x	x	x	x	x	x	x
All Notes	x	x	x	x	x	x	x	x	x	x	x	x	x	x
All Results	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Recent Chart	x	x	x	x	x	x	x	x	x	x	x	x	x	x

How To Standardize Your Build

Task Views:

- Should use Enterprise task views whenever possible over creating personal views.
    - Easier to support & maintain
    - Improves system performance

- Limit access to build personal views only to help desk or EHR team

- Create site specific shared task views that are assigned to specific roles

How To Standardize Your Build

Task Views:

All users:	**User/Site specific:**
- My Active Tasks	- My Med Tasks
- Current Patient – Active	- Site Charge Tasks
- Current Patient – All	- Site Biller Team
- My Completed Tasks	- Site Med Tasks Coverage
	- Site Provider Coverage
	- Site Nurse/Clinical Coverage
	- Site Clinical Team
	- Site Delegated Tasks
	- Site Submit Enc Tasks
	- Site Ancillary Team
	- Site Clerical Team

- Good practice is to use a site name that will not change (for example: a number for each site)

How To Standardize Your Build

Task Views – example:

Site Charge Tasks

Site - Charge Tasks	Task Is	>	Mng Chg Edits (Manage Charge Edits)	>	Status Is	>	Active	>
Description:			Review Enc Form				In progress	
Charge Tasks for 'Site Name': includes all charges for billing staff to review and submit.			Submit Res Encounter					
			Adjust Charges					

Note: this particular task view is an example of where you might want to use the billing location and area custom task filters

How To Standardize Your Build

Task Views – User Matrix:

User Roles	Billing	Medical Records	Front Desk / Secretary	MA / CNA	RN / LPN	Provider	NP	PA	Site Admin	Ancillary	Nutritionist / Social Worker / Counselor	View Only	Help Desk	App Admin
Task Views														
My Active Tasks (Default View)	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT	DEFAULT
Current Patient - Active	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Current Patient - All	x	x	x	x	x	x	x	x	x	x	x	x	x	x
My Completed Tasks	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Site Charge Tasks	x								x					
My Med Tasks						x	x	x						
Site Med Tasks				x	x	x	x	x	x					
Site Prov Coverage View						x	x	x	x					
Site Results Communication				x	x		x	x	x					
Site Clerical Tasks			x						x					
Site Nurse Coverage					x				x					
Site MA Coverage				x					x					
Site Submit enc task	x								x					
Site Biller Team	x								x					
Site Ancillary Team									x	x				
Site Sec Team		x							x					
Site Nurse Team					x				x					
Site Front Desk Team			x						x					

How To Standardize Your Build

Worklist Views

- Like the task views it is recommended to use the Enterprise views instead of creating personal views

- Views should be site specific
    - Easier to maintain
    - Improves system performance
    - Less of a need to rely on personal filters

- Order Result Management, Orders Req Follow-Up, Orders Req Financial Auth & Orders Req Scheduling are good worklists to start with and work well as they are delivered but if edits are needed be sure to keep the current site filter

- Site managers should get every worklist and task list view to monitor the work that needs to be done at their site

How To Standardize Your Build

Worklist Views

All Users:	User Specific:
- Overdue Orders	- Order-Result Management
	- Order-Result Group Coverage
	- Orders Req Follow-Up
	- Financial Auth Orders
	- Med Administration
	- In House Orders
	- Specimen Collection

How To Standardize Your Build

Worklist Views – User Matrix:

User Roles	Billing	Medical Records	Front Desk / Secretary	MA / CNA	RN / LPN	Provider	NP	PA	Site Admin	Ancillary	Nutritionist / Social Worker / Counselor	View Only	Help Desk	App Admin
Worklist Views														
Order-Result Management						DEFAULT	DEFAULT	DEFAULT						
Order-Result Group Coverage				x	DEFAULT (if not using specimen collection)	x	x	x	x				DEFAULT	DEFAULT
Orders Requiring FU			DEFAULT						x				x	x
Overdue Orders	x	x	x	x	x	x	x	x	DEFAULT	x	DEFAULT		x	x
Financial Auth Orders	DEFAULT		x		x				x				x	x
Specimen Collection				DEFAULT	DEFAULT (if using specimen collection)				x	x			x	x
In House Orders (select tests)				x	x				x	DEFAULT			x	x
Med Administration				x	x		x	x	x				x	x

How To Standardize Your Build

Preferences:

- Preferences should be decided on by your organization
- Limit the number of preferences that the user can override

Meds:	**General:**
- Immunization Order Authorization	- Always Present Site Selector for User
- Non-Scheduled Meds Order Authorization	- Enable Allergy Verification
- Scheduled III to V Meds Order Authorization	**Meds/Orders:**
- Schedule II Meds Order Authorization	- Enable Rx-Order Verification
	Problem:
	- Enable Problem Verification
	Orders:
	- Non-Med Order Authorization Required

How To Standardize Your Build

Preferences - Meds:

Preference: Meds ▼	Ent/Org/User Settings Enterprise ▼			
Preference ▼	**SubKey** ▼	**Description** ▼	**Value** ▼	**User Can Override** ▼
Non-scheduledMedsOrderAuthorizationRequired		Non-scheduled Meds Order Authorization Required	Retrospective ▼ Prospective Retrospective Not Required	☐
ImmunizationOrderAuthorizationRequired		Immunization Order Authorization Required	Retrospective ▼ Prospective Retrospective Not Required	☐
ScheduleIIItoVMedsOrderAuthorizationRequired		Schedule III to V Meds Order Authorization Required	Prospective ▼ Prospective Retrospective Not Required	☐
ScheduleIIMedsOrderAuthorizationRequired		Schedule II Meds Order Authorization Required	Prospective ▼ Prospective Retrospective Not Required	☐

How To Standardize Your Build

Preferences – General & Meds/Orders:

How To Standardize Your Build

Preferences – Problem & Orders:

Preference: Problem	Ent/Org/User Settings Enterprise			
Preference ▽	SubKey ▽	Description ▽	Value ▽	User Can Override ▽
Enable Problem Verification		Enable Problem Verification	N ▾ / Y / N	☐

Preference: Orders	Ent/Org/User Settings Enterprise			
Preference ▽	SubKey ▽	Description ▽	Value ▽	User Can Override ▽
Non-medicationOrderAuthorizationRequired		Non-medication Order Authorization Required	Prospective ▾ / Prospective / Retrospective / Not Required	☐

How To Standardize Your Build

Preferences – User Matrix:

User Roles	Billing	Medical Records	Front Desk / Secretary	MA / CNA	RN / LPN	Provider	NP	PA	Site Admin	Ancillary	Nutritionist / Social Worker / Counselor	View Only	Help Desk	App Admin
Preferences (Org Specific)														
Immunization Order Auth	P	P	P	P	R	NR	NR	NR	P	P	P	P	P	P
Non-Scheduled Meds Order Auth	P	P	P	R	R	NR	NR	NR	P	P	P	P	P	P
Scheduled III to V Meds Order Auth	P	P	P	P	P	NR	NR	NR	P	P	P	P	P	P
Scheduled II Meds Order Auth	P	P	P	P	P	NR	NR	NR	P	P	P	P	P	P
Enable Rx-Order Verification	Y	Y	Y	N	N	N	N	N	Y	N	N	Y	Y	Y
Always Present Site Selector for User	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Enable Allergy Verification	Y	Y	Y	N	N	N	N	N	Y	Y	Y	Y	Y	Y
Enable Problem Verification	Y	Y	Y	N	N	N	N	N	Y	Y	Y	Y	Y	Y
Non-Med Order Auth Required	P	P	P	R	R	NR	NR	NR	P	P	P	P	P	P
Submit Encounter Task Generated On Arrival ("Don't generate Send Charge Task" checkbox in user's profile)	NA	NA	NA	NA	NA	Y	Y	Y	NA	NA	NA	NA	NA	NA
Vitals Picklist	Vital Signs	Vital Signs	Vital Signs	Vital Signs	Vital Signs	Vital Signs	Vital Signs	Vital Signs	Vital Signs	Vital Signs	Vital Signs	Signs	Vital Signs	Vital Signs
Default Vitals - <10 years old	Child<10	Child<10	Child<10	Child<10	Child<10	Child<10	Child<10	Child<10	Child<10	Child<10	Child<10	Child<10	Child<10	Child<10
Default Vitals - 3 year old and younger	Child<3	Child<3	Child<3	Child<3	Child<3	Child<3	Child<3	Child<3	Child<3	Child<3	Child<3	Child<3	Child<3	Child<3
Default Vitals - Female 10 years old or older	Female 10>	Female 10>	Female 10>	Female 10>	Female 10>	Female 10>	Female 10>	Female 10>	Female 10>	Female 10>	Female 10>	10>	Female 10>	Female 10>
Default Vitals - Male 10 years old or older	Male 10>	Male 10>	Male 10>	Male 10>	Male 10>	Male 10>	Male 10>	Male 10>	Male 10>	Male 10>	Male 10>	Male 10>	Male 10>	Male 10>
ChgWorksCreateRevEncFormTasks	Never	NA	NA	NA	NA	Always	Always	Always	NA	NA	NA	NA	NA	NA

"P Prospective"
"R Retrospective"
"NR Not Required"

Questions

Additional Resources

Menus Configuration:
http://wiki.galenhealthcare.com/Menus_Webcast

Worklist Webcast:
http://wiki.galenhealthcare.com/Worklist_Webcast

Functional Security:
http://wiki.galenhealthcare.com/Functional_Security

Tasking Concepts:
http://wiki.galenhealthcare.com/Tasking_Concepts

Galen Resources

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