Results Verification

Workflows November 22, 2013

Empowering Extraordinary Patient Care

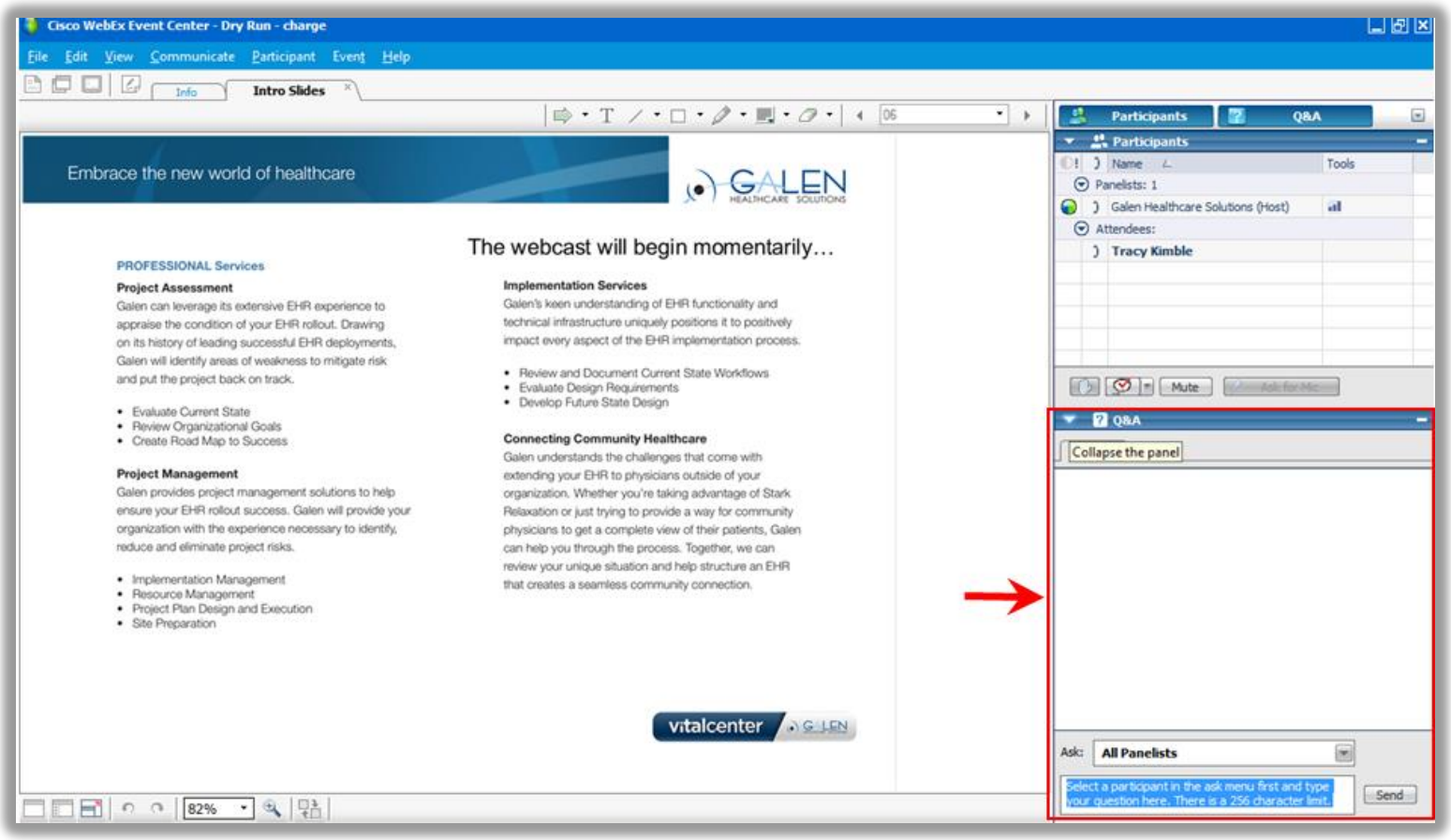
GALEN HEALTHCARE SOLUTIONS

Todays presentors……

Cece Teague and Laura Gold

Galen Certified -Enterprise EHR Consultants

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



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Result Verification Agenda

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

Results Verification
How is it Intended to Work?

Results are received via Interface as a Task

Verify Patient Result Task goes to the providers

Providers verify Results and select the Patient Communication method

Clinical staff communicate Results to patient

Verified Result is available in chart and can be trended

Considerations

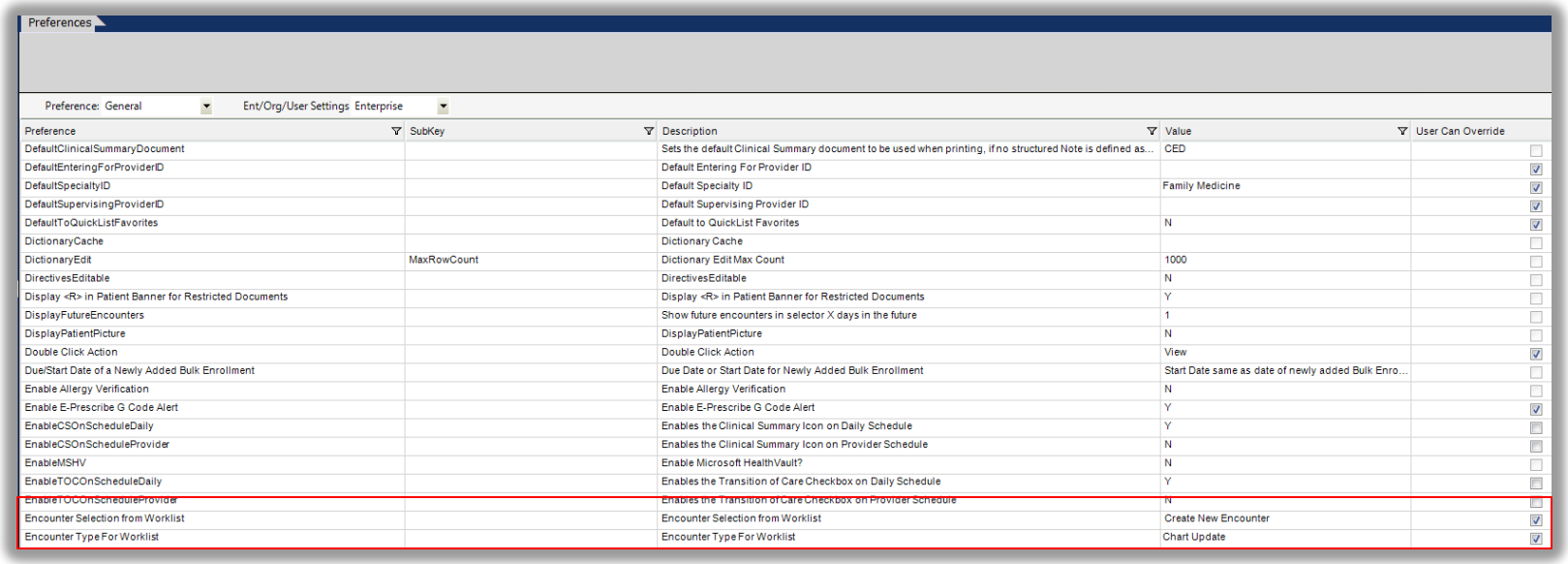
- How do results come back?
- Who will be verifying results?
- How are results verified when covering an absence?
- How are verified results documented and then communicated to the patient?
- Worklist and Task List

Mock Client Workflows

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

General Preferences

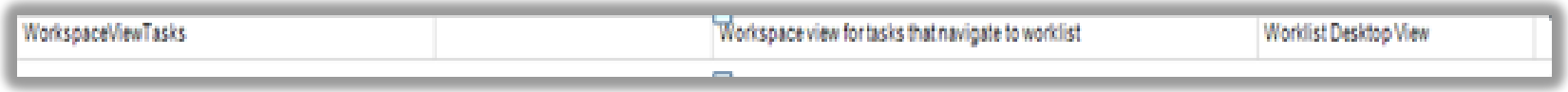
- Encounter Selection from Workist
- Encounter Type for Worklist
- WorkspaceViewTasks



Preferences

Preference: General Ent/Org/User Settings Enterprise

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



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

Result Preferences

Provider Preferences

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

Resident Preferences

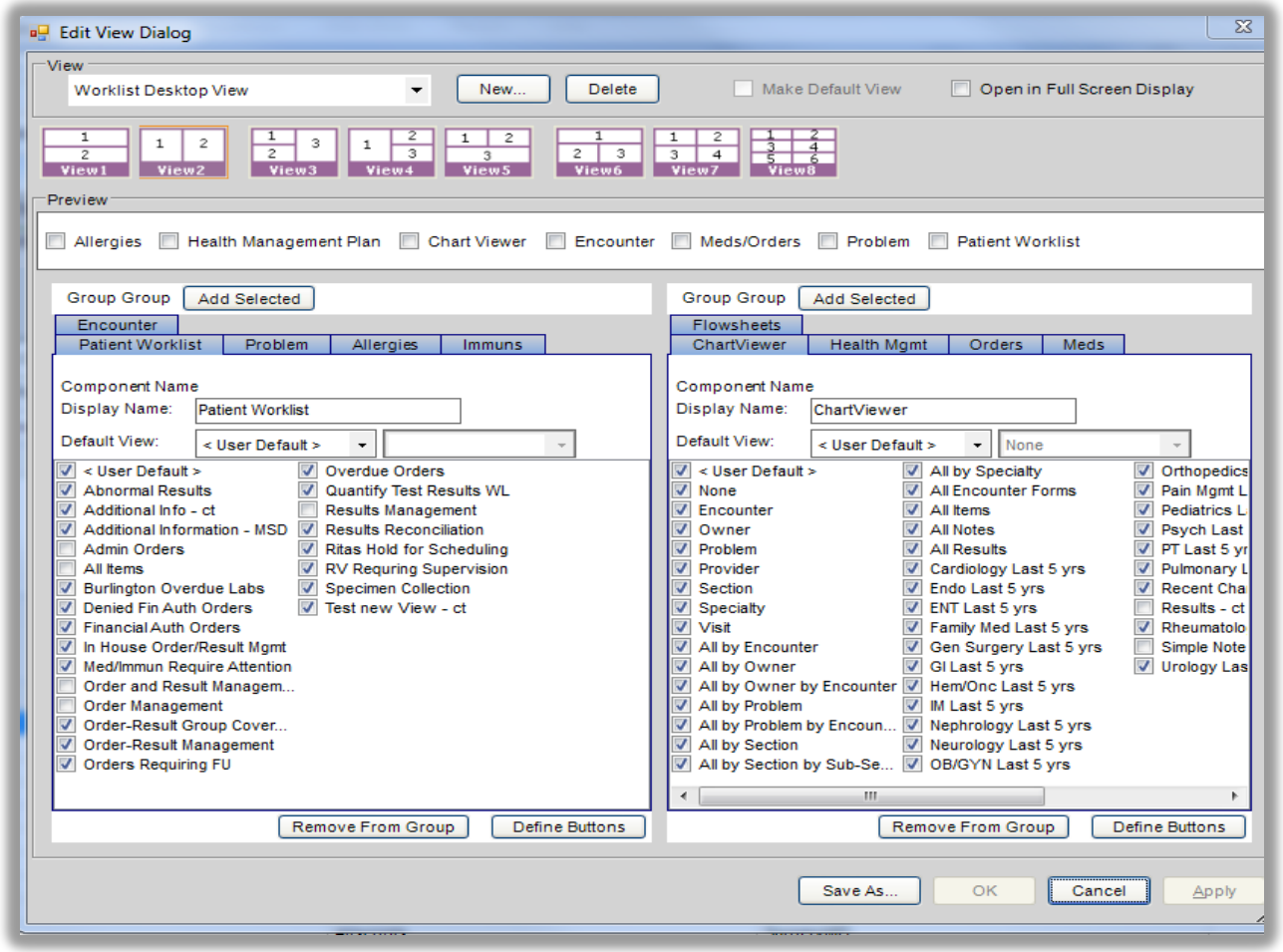
Y
N
Warn
Stay on Worklist
Go to Note
Result Note
Result Note
Create New Note
Create New Note
Mail Results to Patient
Call patient with results;Mail Results to Patient
Ordering Provider
Y
Y

A note is created for every verified result.

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

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

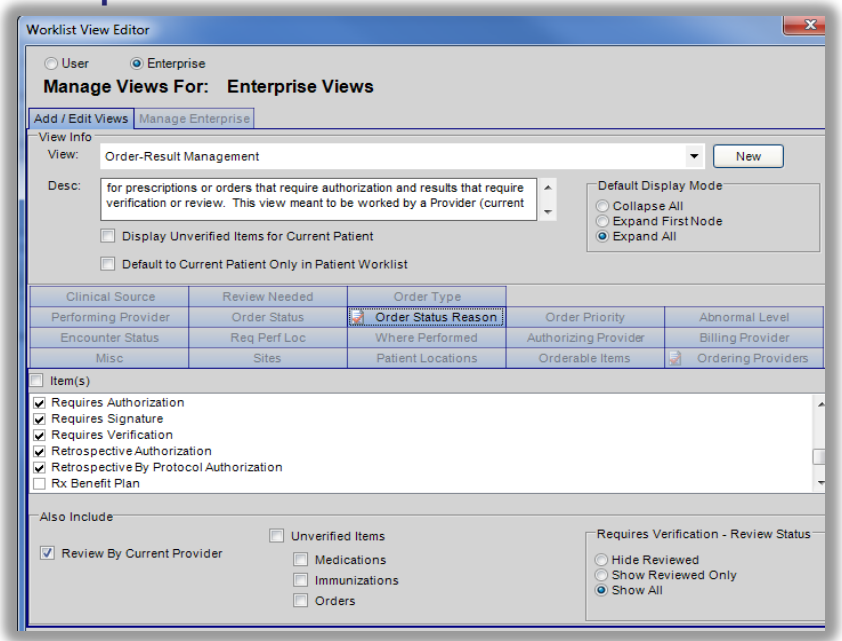
Worklist Desktop View



Order-Result Management Worklist Configuration

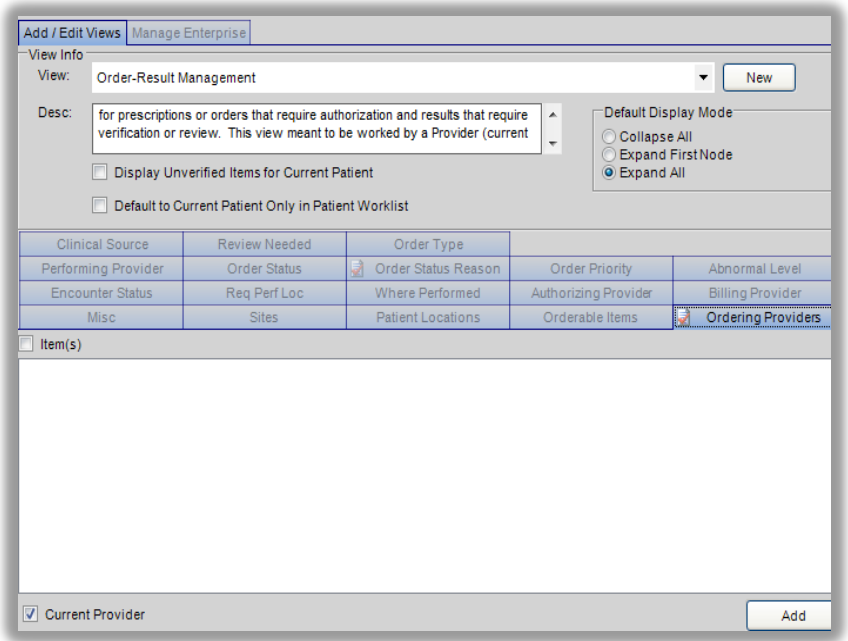
Order Status Reason

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



Ordering Providers

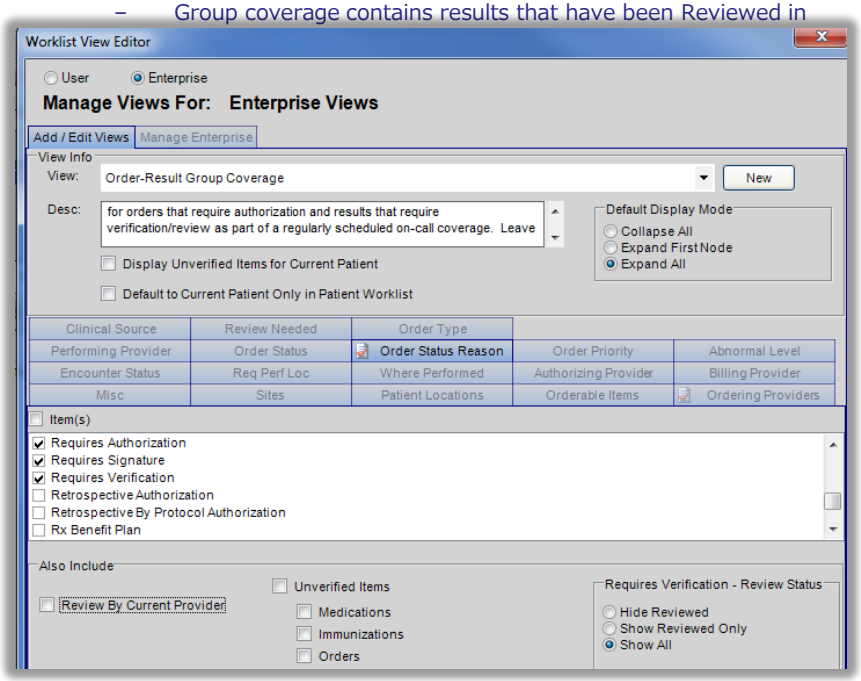
- **Ordering Providers – Current Provider**
  - Use Ordering Providers filter, because the ordered by and supervised by fields for a resulted order could be different in our example.
- **Default to Expand All**



Order-Result Group Coverage Worklist Configuration

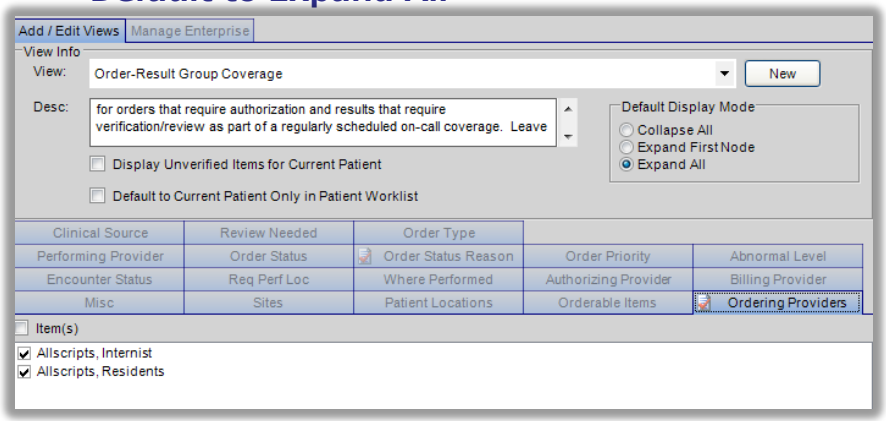
Order Status Reason

- **Requires Authorization**
- **Requires Signature**
- **Requires Verification**
- **Requires Verification-Review Status-Show All**
  - Group coverage contains results that have been Reviewed in

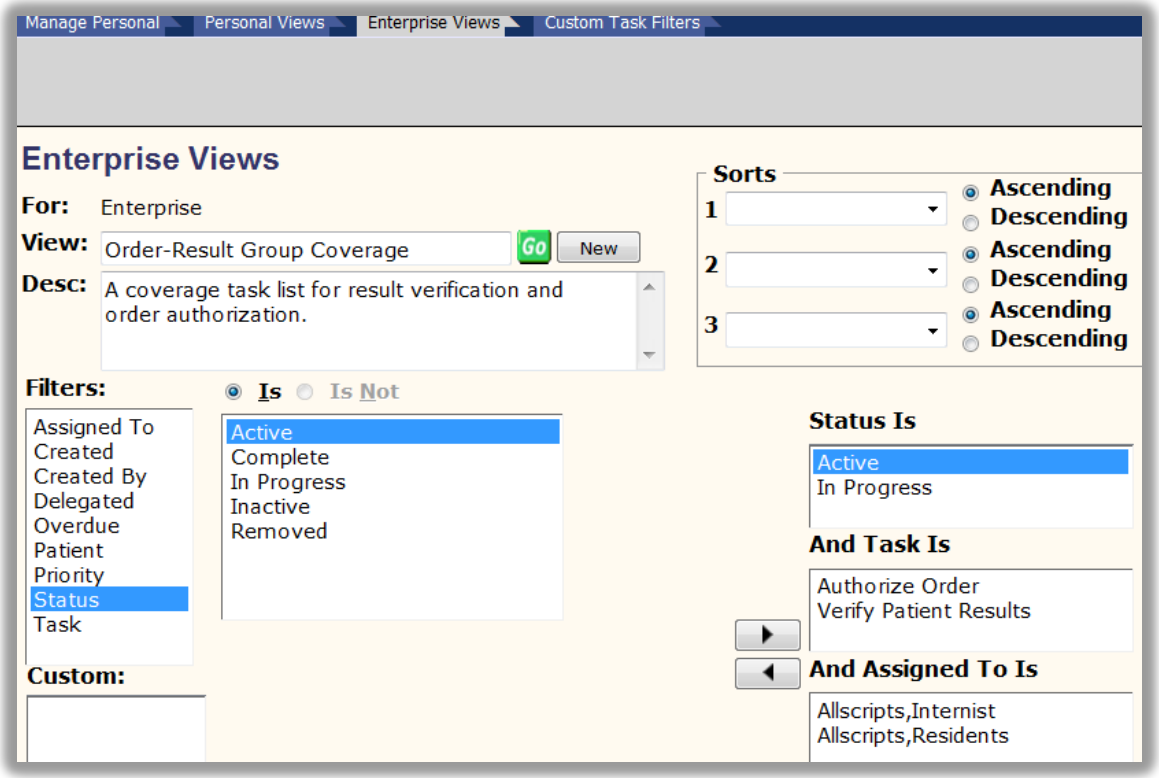


Ordering Providers

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

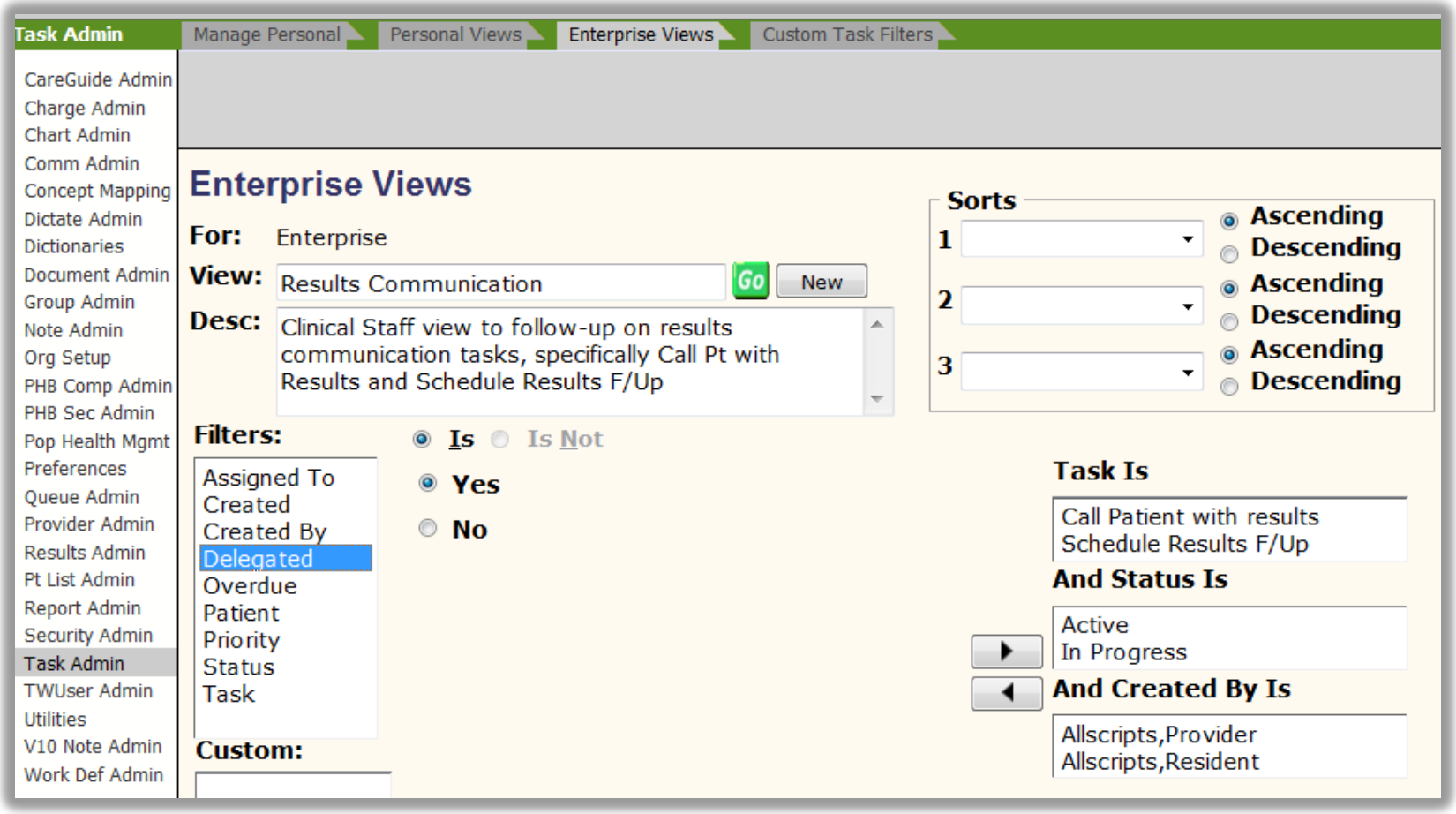


Order-Result Group Coverage Task List

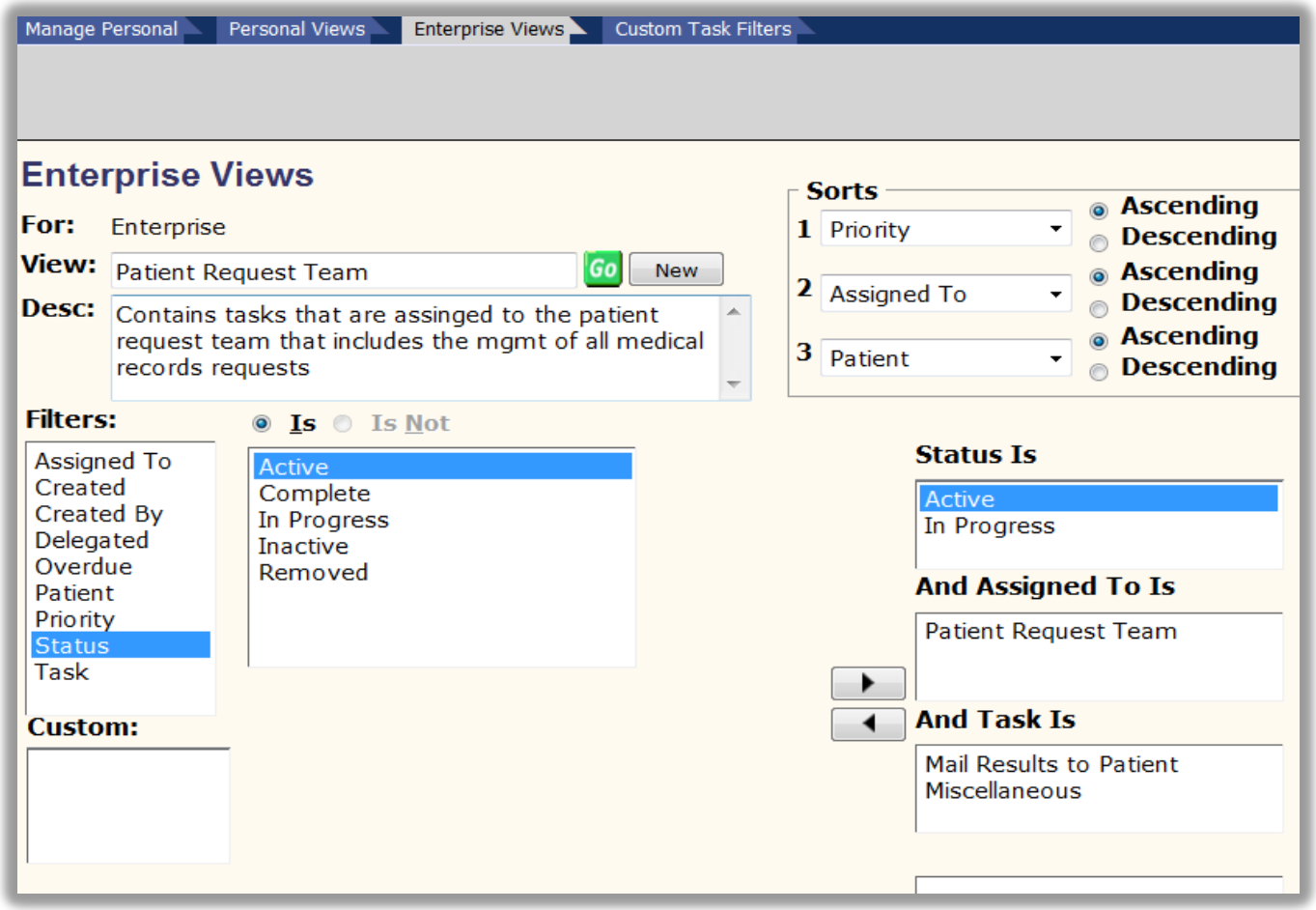


After navigating to the Worklist Desktop View from these tasks, the user must manually select Order-Result Group Coverage Worklist View to be able to see another Ordering Provider's results.

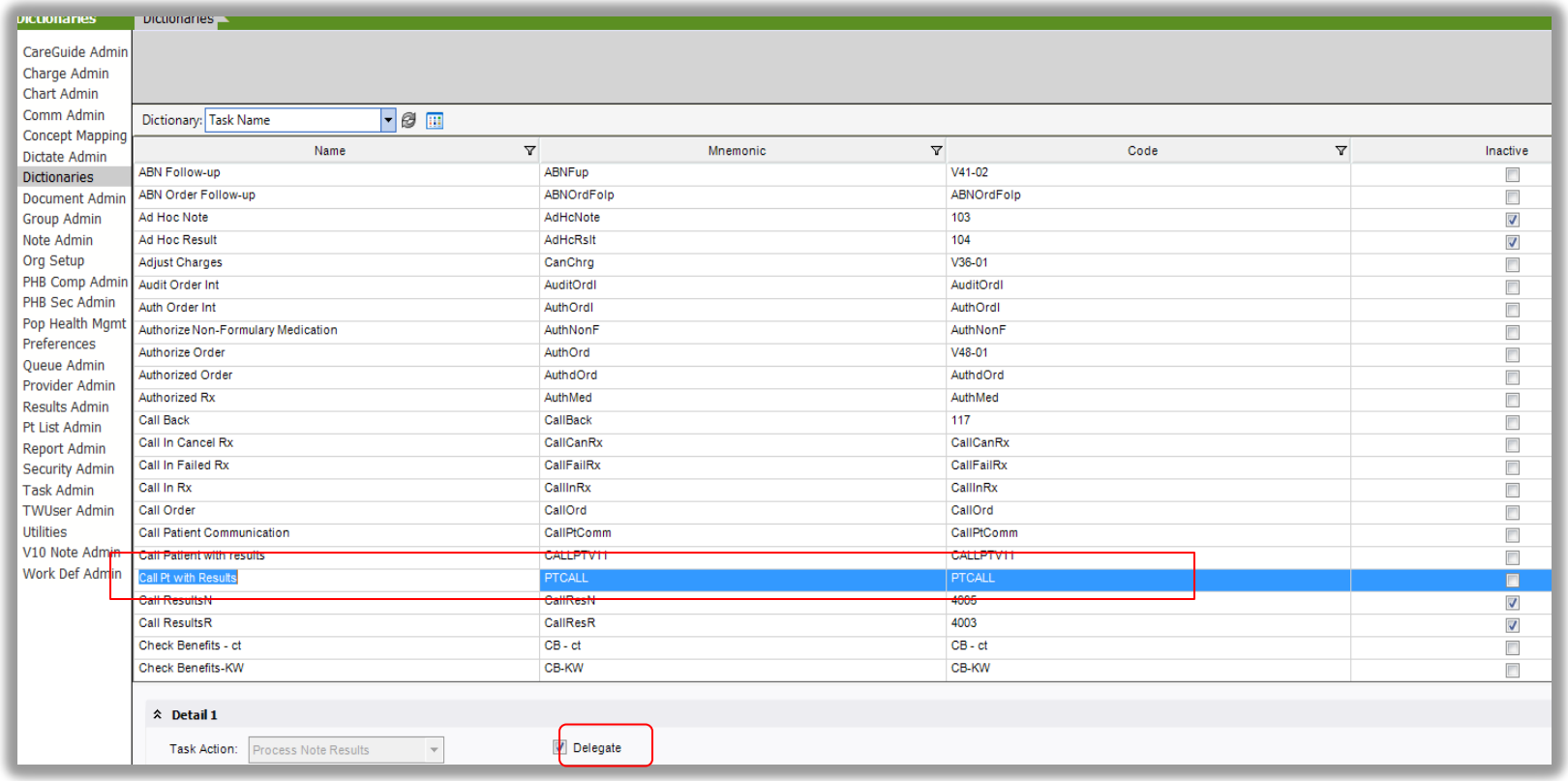
Clinical Staff
Results Communication Task List



Medical Records Task List

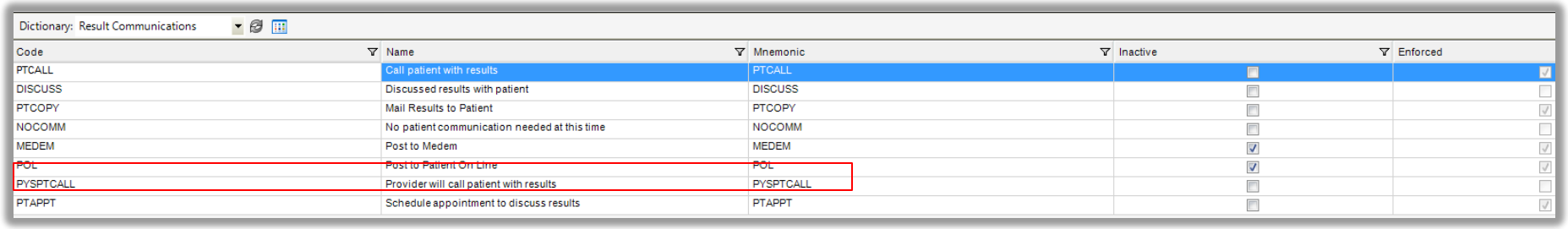


Task Name Dictionary



Result Communications Dictionary

- **Adding an item to the Result Communications Dictionary**



Dictionary: Result Communications

Code	Name	Mnemonic	Inactive	Enforced
PTCALL	Call patient with results	PTCALL	☐	☑
DISCUSS	Discussed results with patient	DISCUSS	☐	☐
PTCOPY	Mail Results to Patient	PTCOPY	☐	☑
NOCOMM	No patient communication needed at this time	NOCOMM	☐	☐
MEDEM	Post to Medem	MEDEM	☑	☑
POL	Post to Patient On Line	POL	☑	☑
PYSPTCALL	Provider will call patient with results	PYSPTCALL	☐	☐
PTAPPT	Schedule appointment to discuss results	PTAPPT	☐	☑

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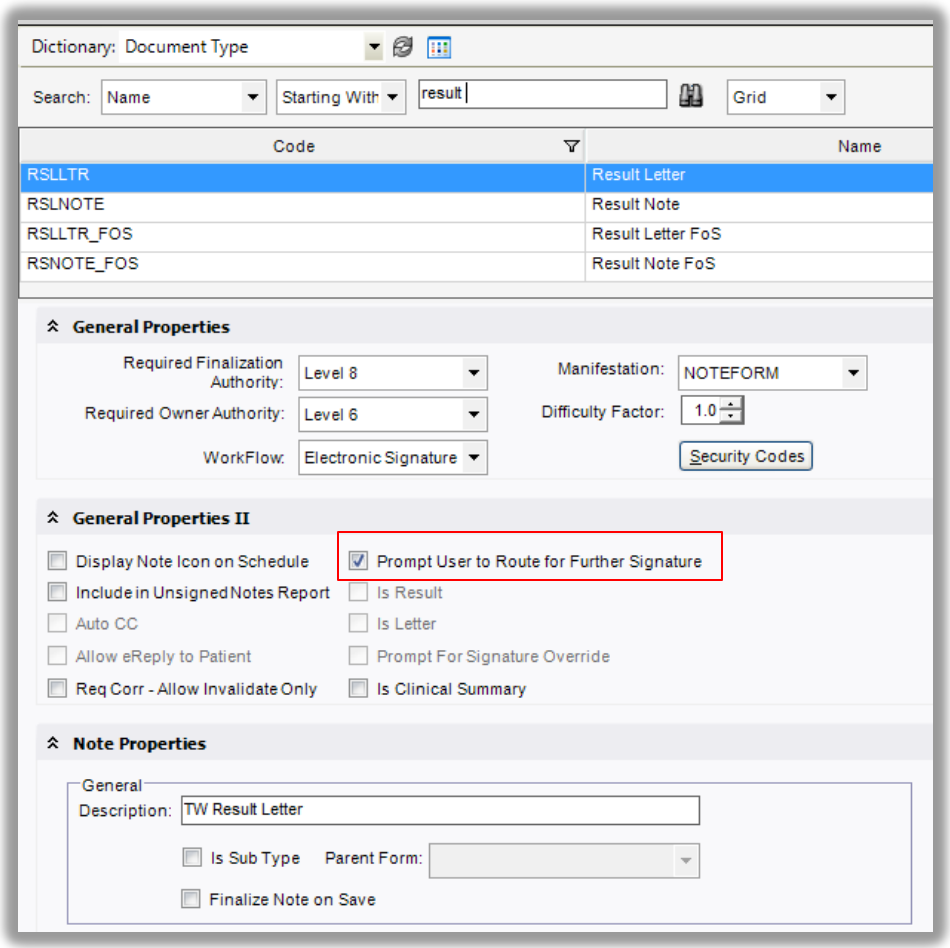
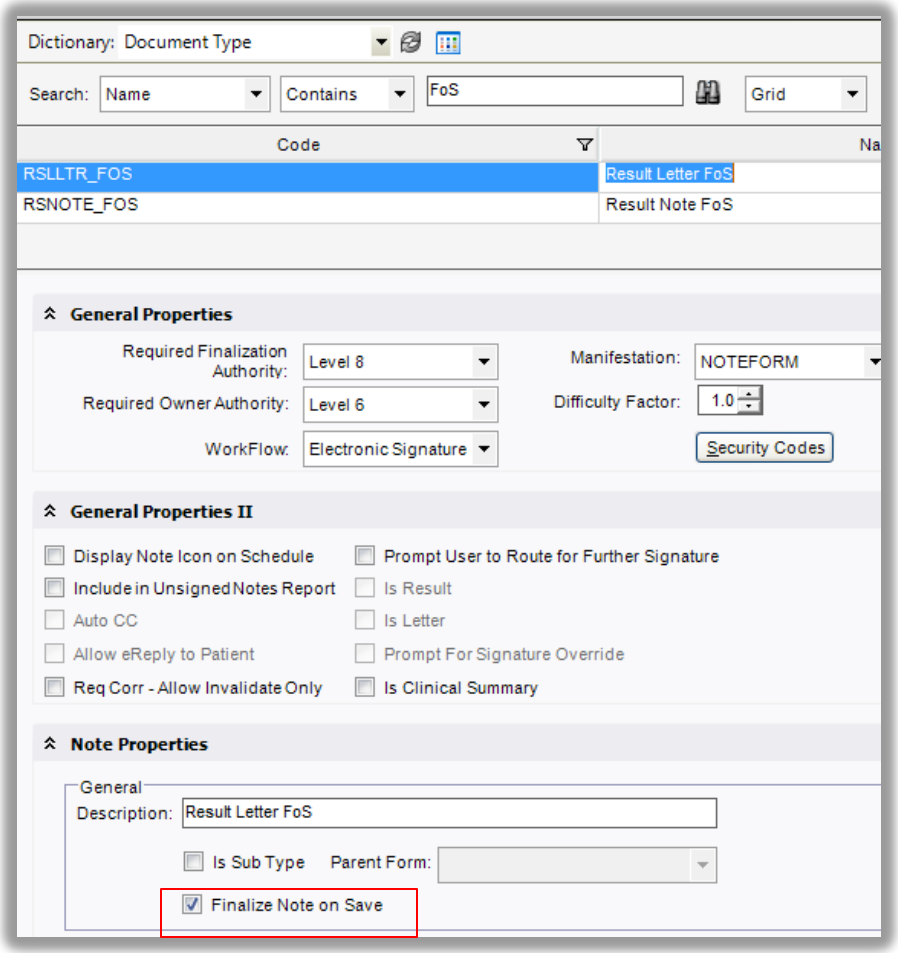
Document Type Dictionary
Result Note and Result Letter

Resident

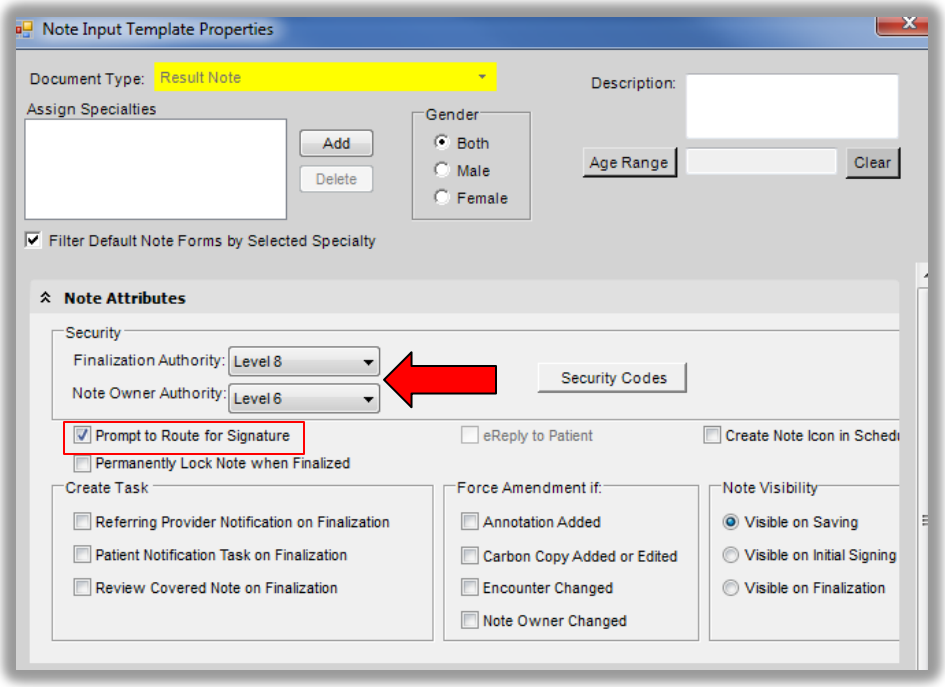


Provider

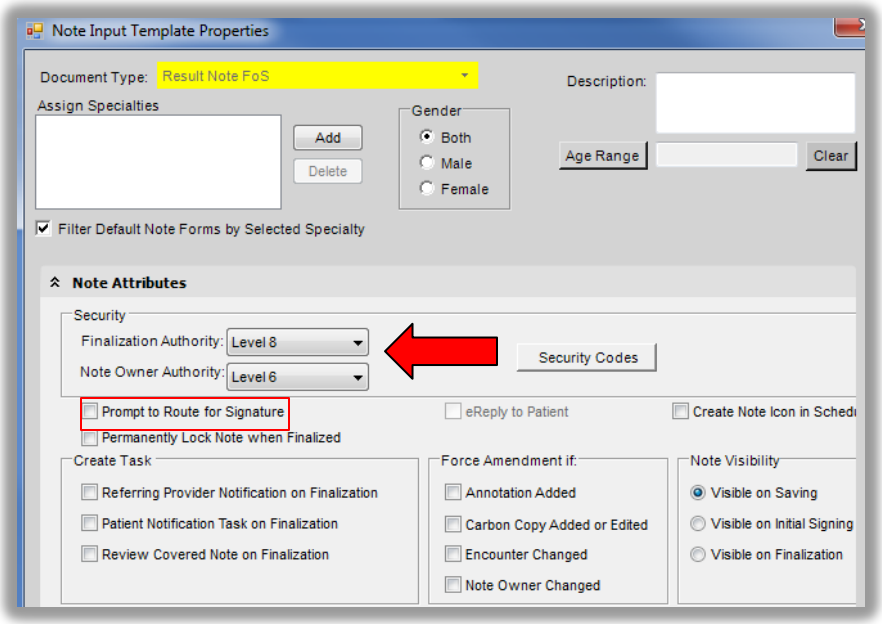


Input Templates

Resident

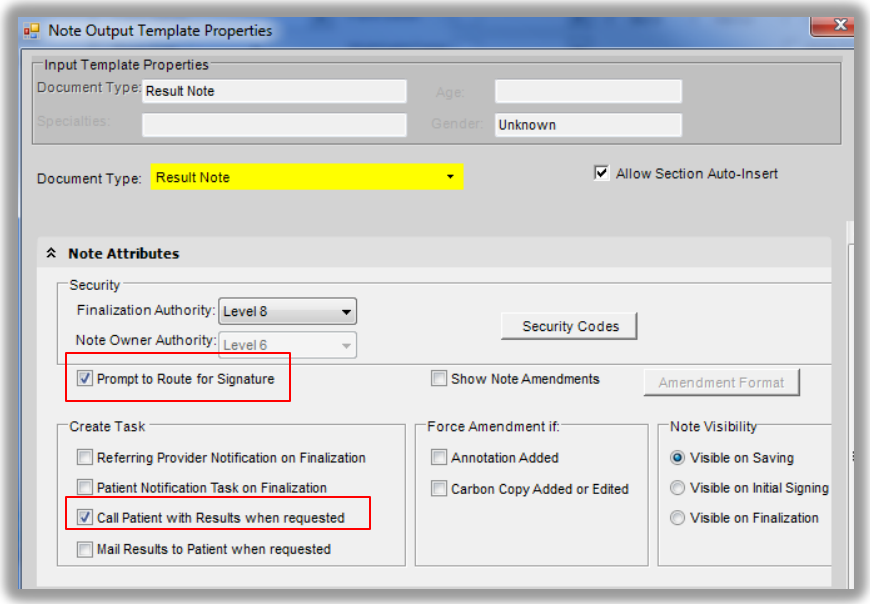


Provider

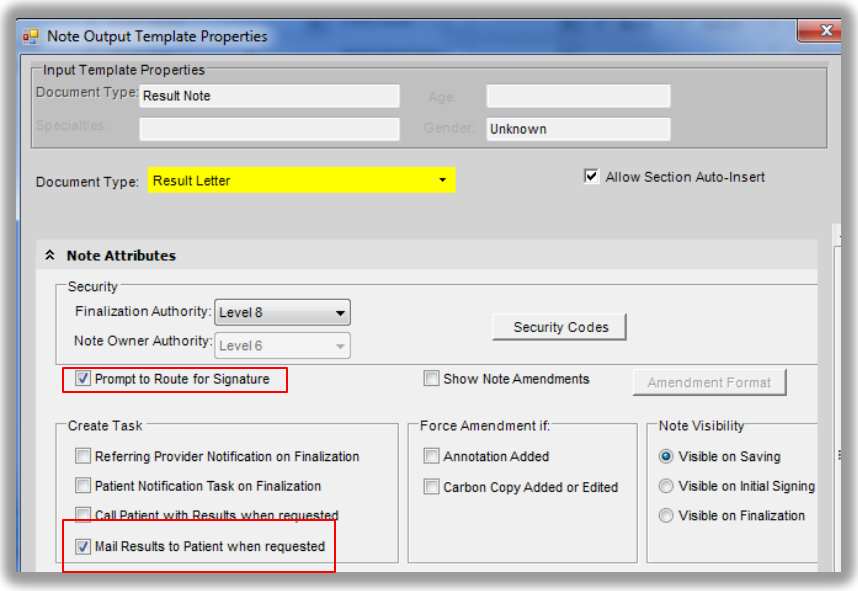


Output Templates

Result Note

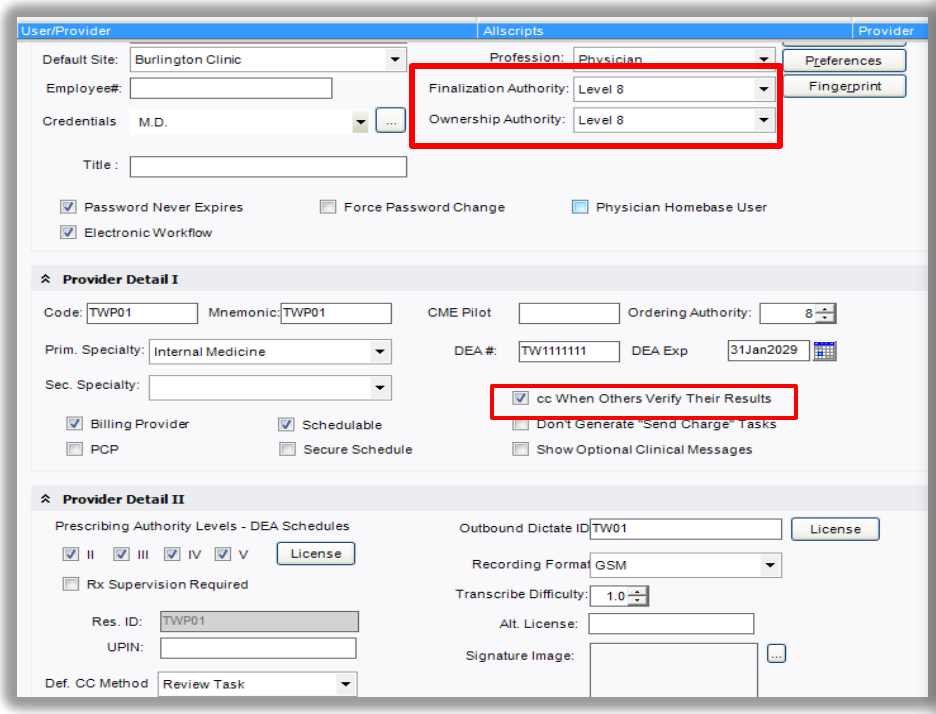


Result Letter

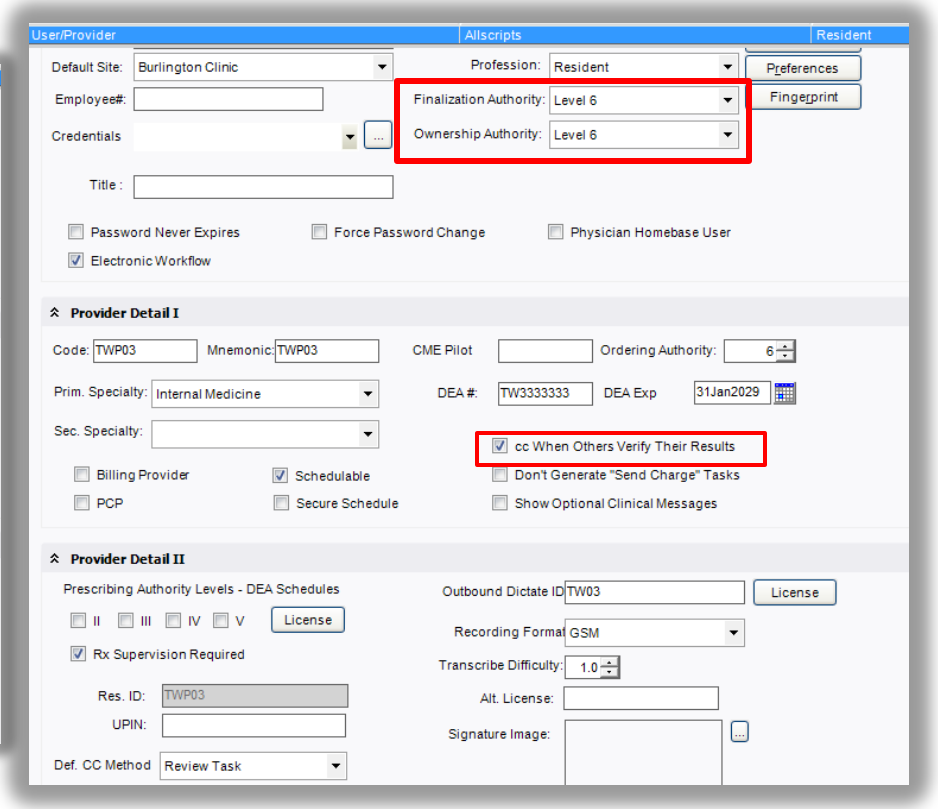


User Set-Up

Provider

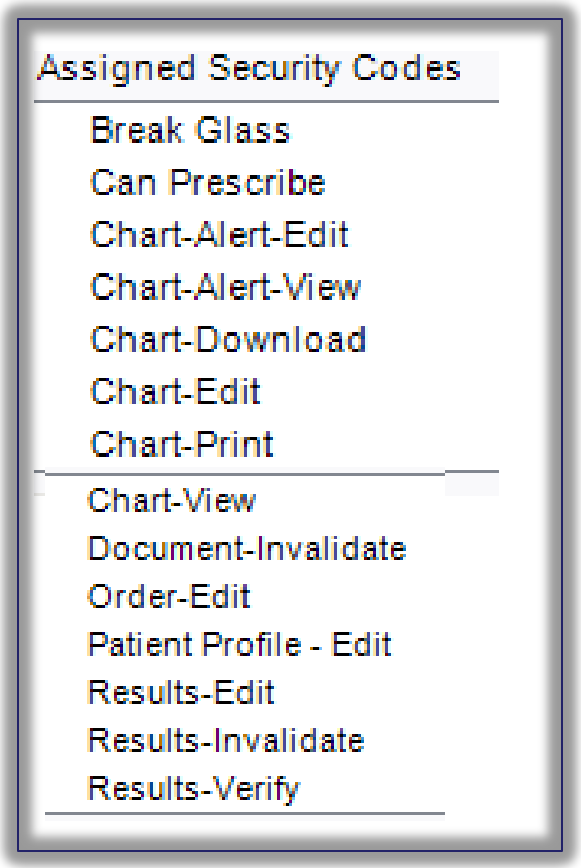


Resident

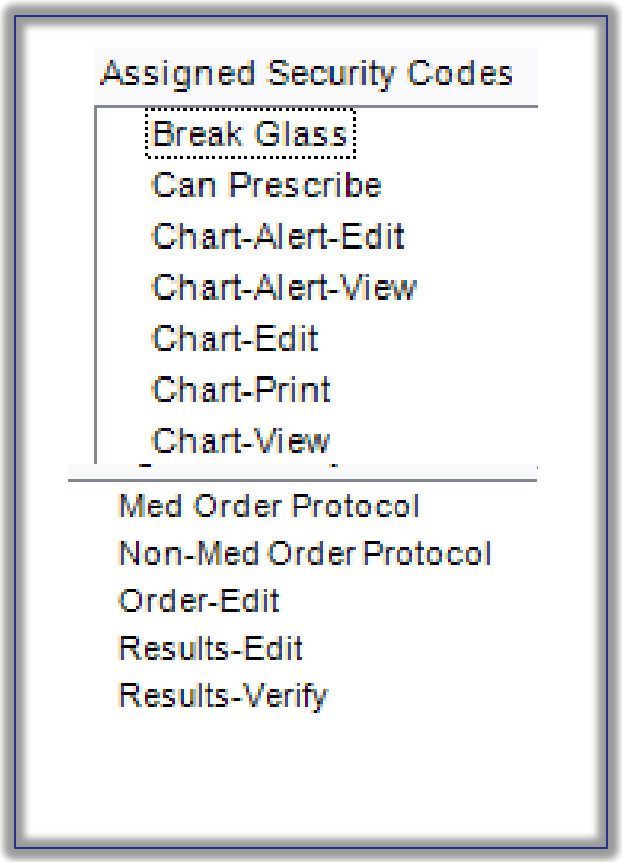


Provider and Resident Security

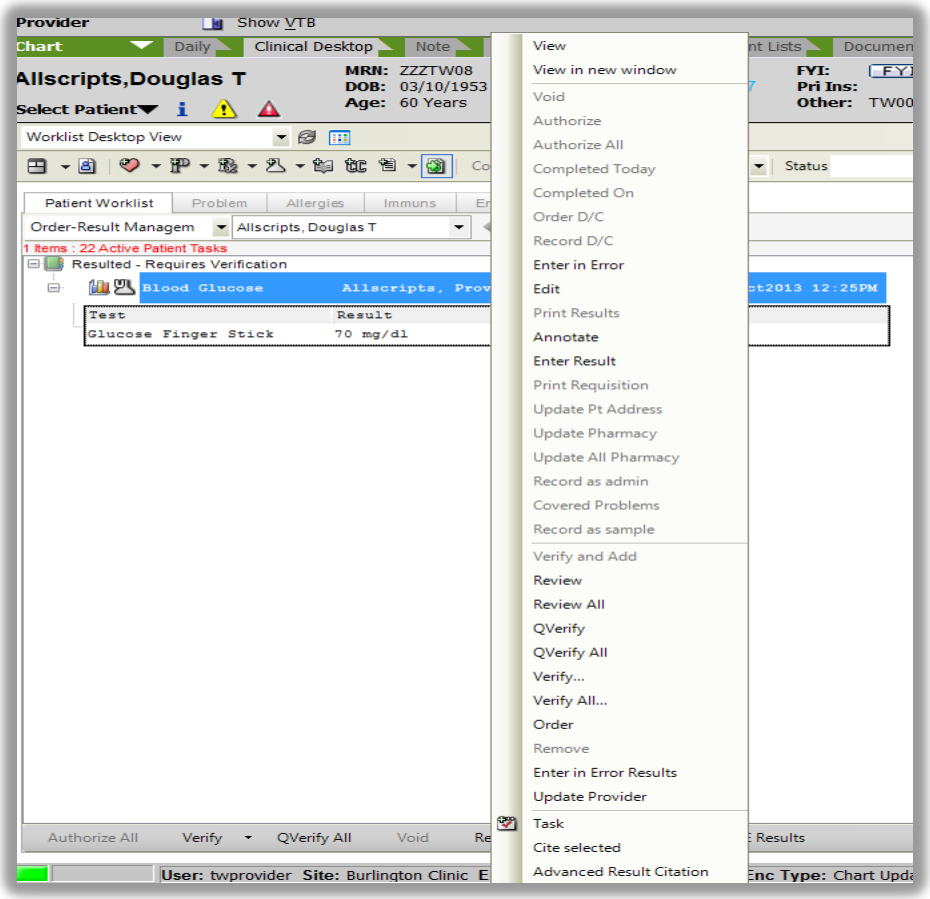
Provider Security Classification



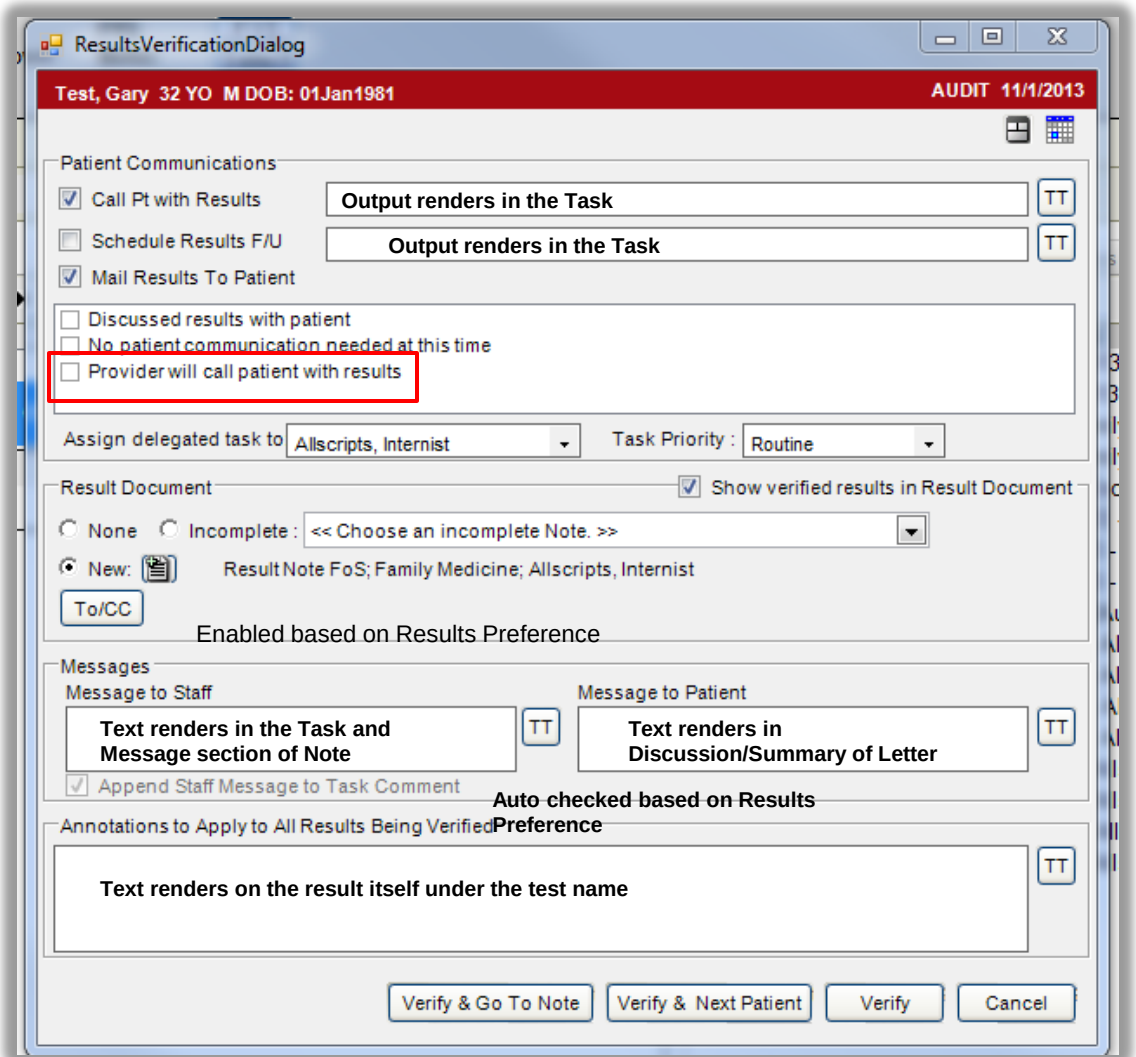
Resident Security Classification



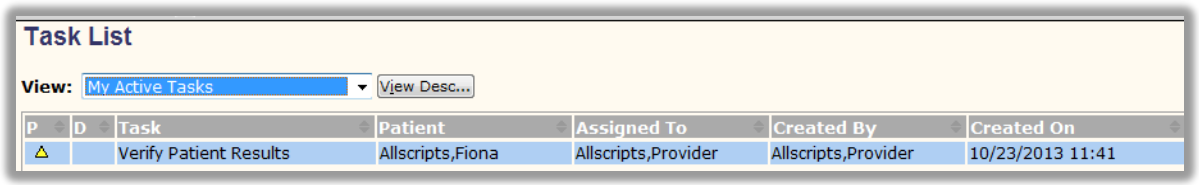
Context Menu

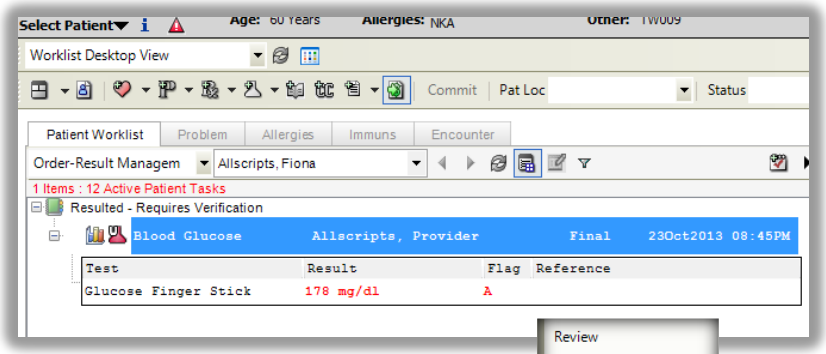


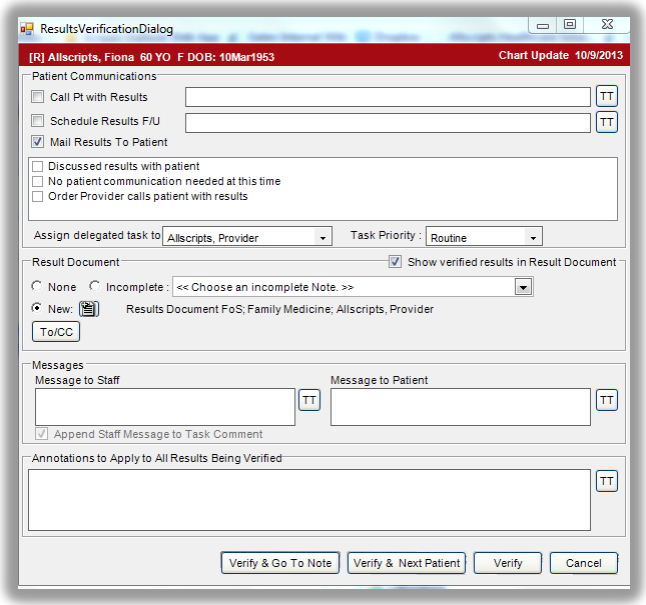
Result Verification Dialog Box Details



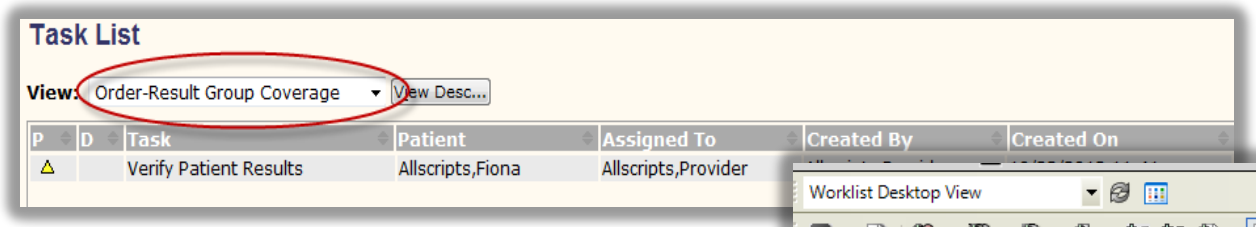
Provider Verifying Results Workflow

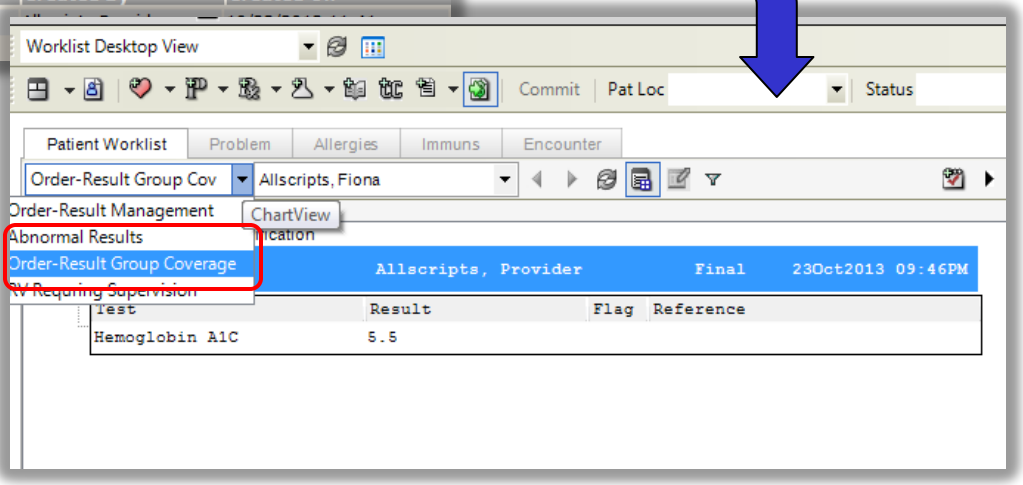


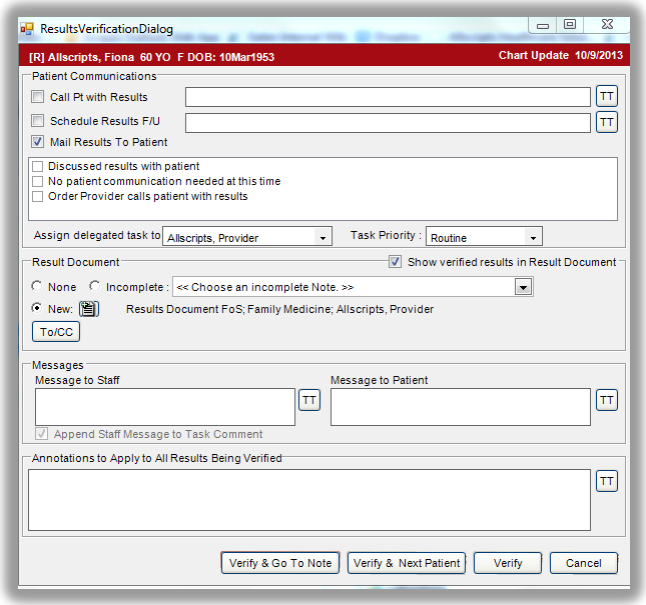


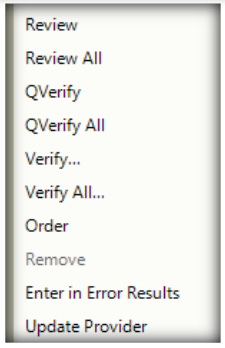


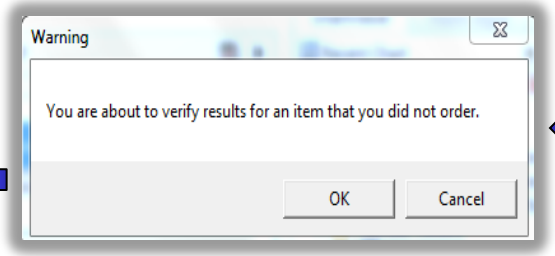
Verifying Another Provider/Resident's Results Workflow











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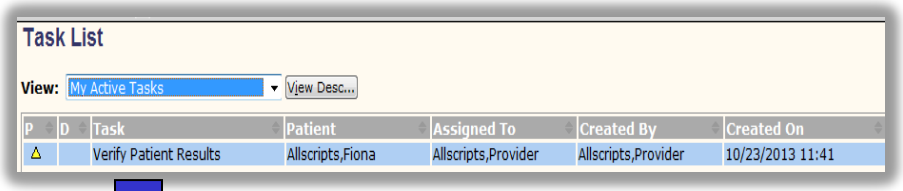
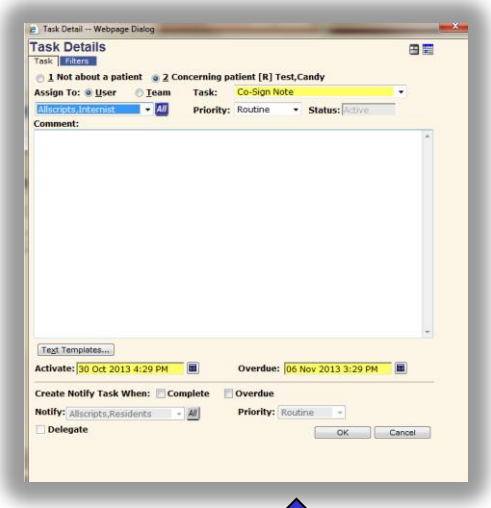
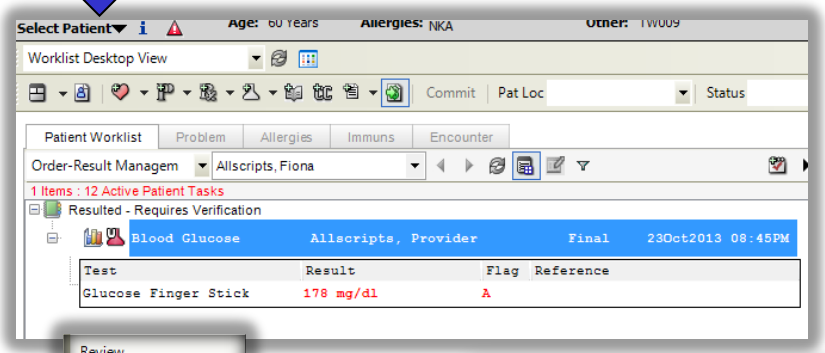
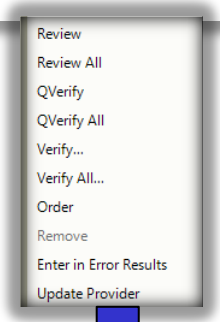
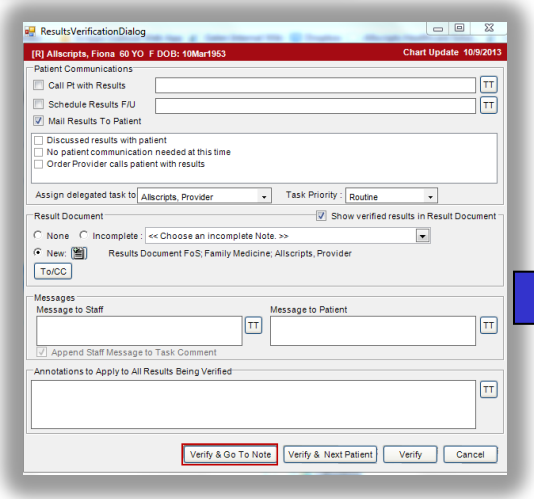
Resident Verifying Results Workflow

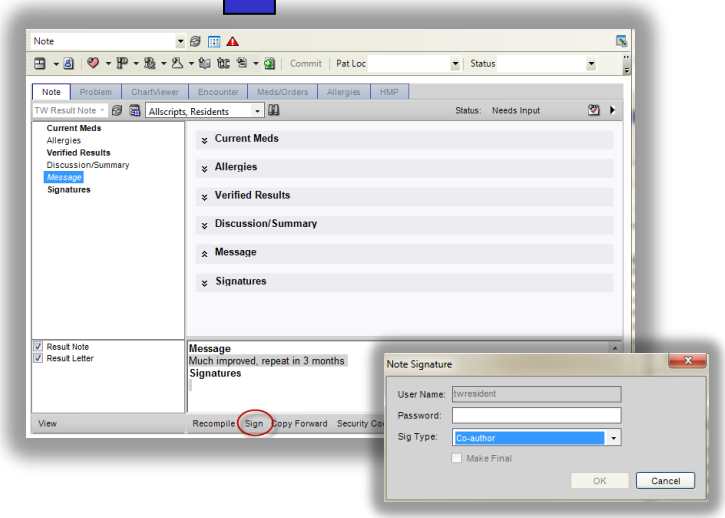










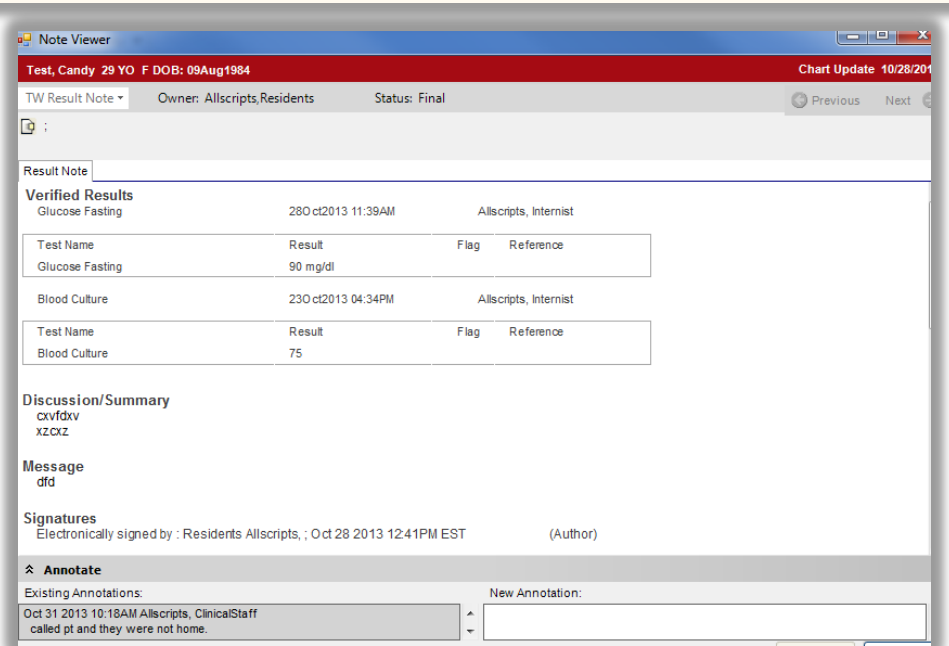


Results Communication

Task List

View: Results Communication | View Desc... | Show: 25

P	D	Task	Patient	Assigned To	Created By	Created On	Status
	Y	Schedule Results F/Up	Test,Sharon	Allscripts,Residents	Allscripts,Residents	10/31/2013 10:05	Active
	Y	Schedule Results F/Up	Test,Test	Allscripts,Residents	Allscripts,Residents	10/31/2013 10:09	Active
	Y	Call Patient with results	Test,Candy	Allscripts,Internist	Allscripts,Residents	10/28/2013 12:38	Active
	Y	Call Patient with results	Test,Candy	Allscripts,Internist	Allscripts,Residents	10/28/2013 12:38	Active
	Y	Call Patient with results	Test,Gary	Allscripts,Residents	Allscripts,Residents	10/30/2013 05:12	Active
	Y	Call Patient with results	Test,Test	Allscripts,Residents	Allscripts,Residents	10/31/2013 10:09	Active



Summary

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

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

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Q&A

Questions?

- **Submit questions to education@galenhealthcare.com**
- **Visit http://galenhealthcare.com/calendar/ for future webcasts**
- **Presentation slides and complete Q&A will be posted at http://wiki.galenhealthcare.com/results_verification**

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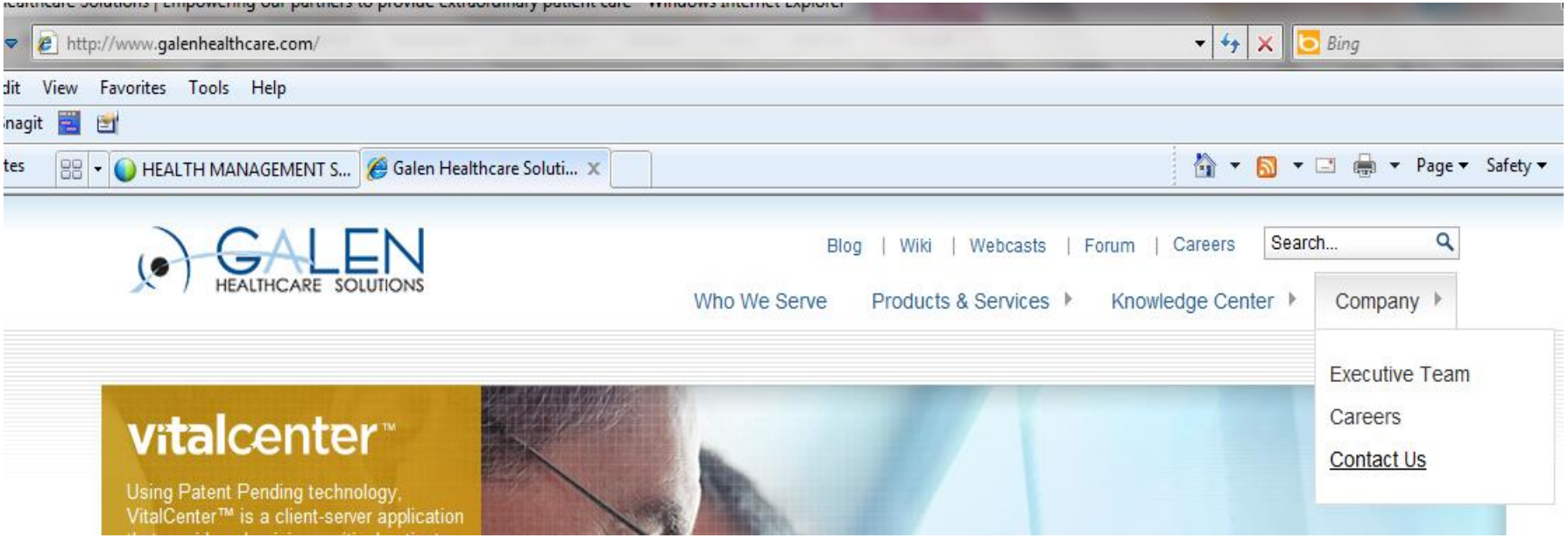
Thank you for joining us today, for additional assistance…

You can contact us through our website at

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