Welcome to today's Webcast…

The webcast will begin momentarily….

Embrace the new world of healthcare

The webcast will begin momentarily…

Who We Are

ALIGN YOURSELF with an Allscripts favorite.

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

EXPERIENCE success at every level.

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

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Solutions For You

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TECHNICAL Services

Interface Services

Exchanging data with third party vendors will increase the amount of valuable data available to the physician at the point-of-care. Galen can provide your organization with the ability to develop, optimize, or identify new opportunities to interface data using the following services:

- Interface Design and Development
- Interface Optimization
- Training / Mentoring
- Device Integration

EHR Reporting

Galen Healthcare Solutions has extensive knowledge of the Allscripts Enterprise EHR™ database architecture and significant experience providing clients with various reporting solutions. Whether you'd like to outsource your reporting needs or raise your team's own ability, Galen can assist by providing services focused in the following areas:

- Custom Crystal Report Writing
- Data Warehousing
- Enterprise EHR ETL Assistance
- Enterprise EHR Analytics Report Building
- Report Training Services

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TECHNICAL Services (Cont.)

Remote Technician

Galen's Allscripts certified EHR technicians will assist your organization with various technical needs from remote monitoring to the creation and maintenance of EHR system environments.

- Hardware / Software Migrations
- Mentoring / Training
- Monitoring

Application Development

As your organization becomes more advanced with the Enterprise EHR application, you will identify opportunities for tools that would help enhance your offering. Galen has the expertise to help with any aspect of custom development including project management, design, development, or implementation. These services will help ensure that you can meet the needs of your clinical users and EHR support staff.

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VitalCenter™

Your Anytime Business Continuity Solution

VitalCenter is a client-server application that delivers patient charts to the point-of-care to ensure business continuity. This Patent Pending technology enables physicians to access electronic copies of patient charts when the EHR is not available. From hardware failures to network outages and even scheduled maintenance, VitalCenter helps health care groups handle any downtime event. And, by offering instant access to records, VitalCenter can significantly increase efficiency during normal business circumstances as well. That's why multiple medical groups around the country rely on VitalCenter to keep them up and running with maximum efficiency.

For more information, visit **vitalcenter.galenhealthcare.com**

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PROFESSIONAL Services

Project Assessment

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

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

Project Management

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

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

Implementation Services

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

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

Connecting Community Healthcare

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

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Application Deployment

Galen has extensive experience customizing and testing the EHR to suit your organization's needs. Providing your users with a system built to meet their needs and the proper tools to complete their daily tasks will help increase success and utilization.

- EHR Development
  - Process and Workflow Design
  - User Population, Security, and Design
  - Application Configuration and Build
  - System Upgrades

- Application Testing
  - Workflow and Design Testing
  - Regression Testing
  - Data Integrity Testing

Training Services

Galen can provide education services ranging from documentation to actual onsite training of your end users. Allowing our staff to work with yours will ensure that your training department is well equipped to handle future EHR training needs.

Meaningful Use

Is your organization ready for meaningful use? The HITECH act is reshaping the EHR landscape and Galen can help. We want to make sure your organization is ready to recoup the unprecedented funding available to U.S. physicians. Whether you're at the beginning stages of adoption, or live on an electronic health record, Galen has the expertise to help guide you through the regulations with:

- Workflow Re-design
- Integration and Connectivity
- Gap Analysis and Benchmarking

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Now Hear This

LISTEN to what others think about our work.

A full 100% of our clients said they would recommend us.

Here's what just a few of them had to say:

"Galen Healthcare Solutions' unique blend of experience, expertise, and customer-centric mindset has proven invaluable to many of our clients. They are an excellent client advocate and Allscripts is pleased to partner with them."

—Laurie McGraw - President of Strategic Accounts, Allscripts

"Galen's technical services have allowed us to utilize TouchWorks™ Enterprise in ways that we never imagined were possible."

—Tom Goodwin - Director of Clinical Information Systems, MIT Medical

"Galen Healthcare offers a unique balance of technical expertise and strategic direction that enhanced our EHR implementation and helped strengthen our internal resources."

—Kevin Manemann - VP Ambulatory Solutions and Strategy, St. Joseph Health System

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Today's Presenters: Paula D. Peter
Cynthia "Cyn" Gerson, RHIA

Paula D. Peter

- EHR Field Service Consultant with Galen Healthcare Solutions, Inc.

  - Joined Galen just before V11.1.0 was delivered as a V10 to V11 Upgrade Consultant
  - Creator of the Galen "Workflow Workshop" - Allows providers 2-4 months hands-on workflow training before Go Live
  - Promoted to Field Service Consultant - This means that I can take a variety of projects, that can last a few weeks, a few months or a few years, and I can do this as either a Galen Representative, an Allscripts Representative or a Client Representative
  - Galen Enthusiast!!!

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Cynthia “Cyn” Gerson, RHIA

- EHR Consultant with Galen Healthcare Solutions

  - B.S in Health Information Management
  - Former HIM Director/Privacy Officer
  - 12 years of experience in the healthcare field. Has worked with various EHR systems during the last 6 years, the last 4 spent focused on all modules of Allscripts Enterprise™ EHR build & deployment.

V11
Worklists

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What is a Worklist ?

A Worklist is simply an area in the V11 AEEHR where Providers and Non Providers work their Order and Results Tasks.

Types of Worklists

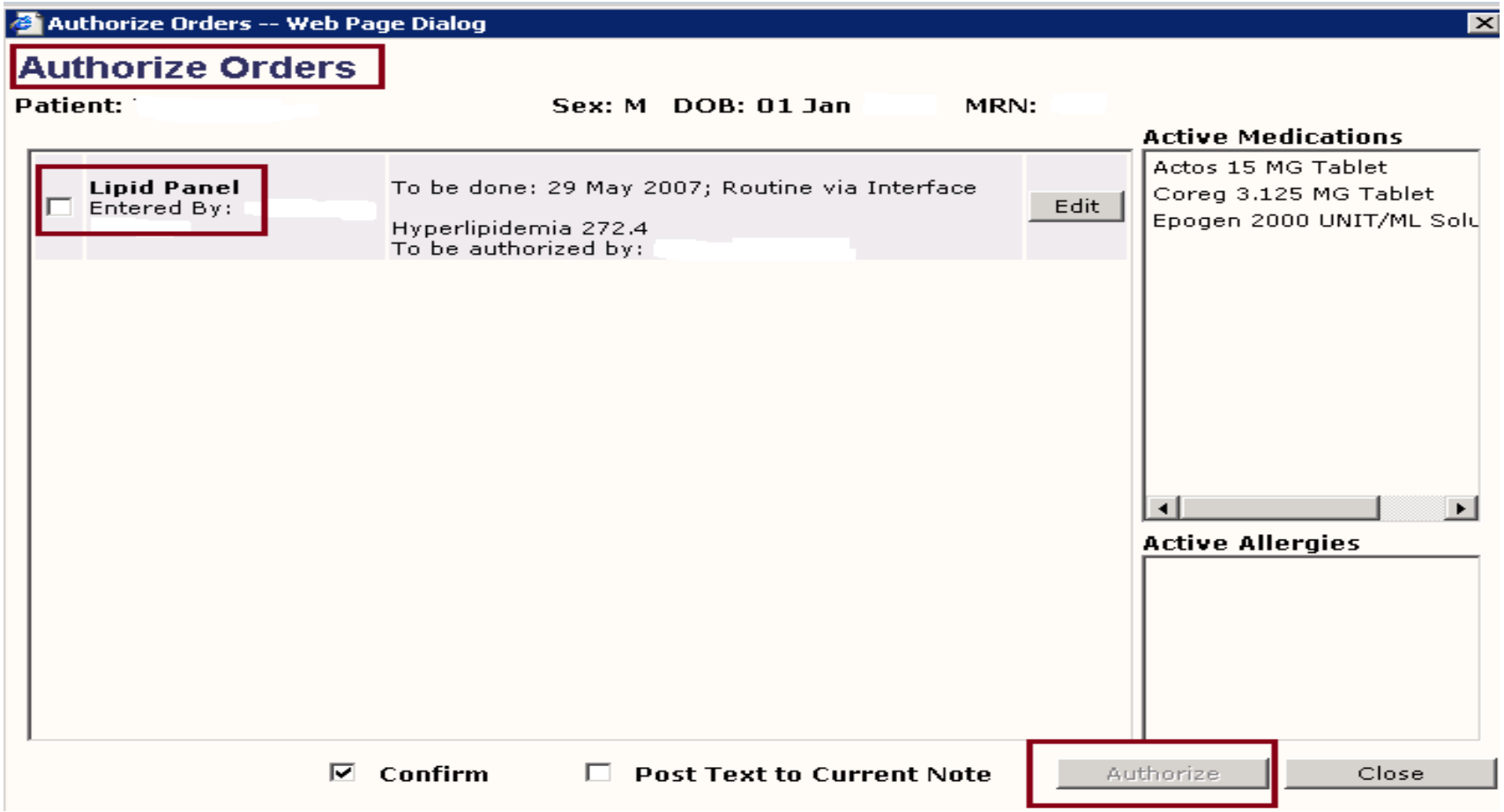
There are two types of worklists In V11

- **A Non-Provider Cross Patient Worklist**
- **A Provider Patient Centric Worklist**

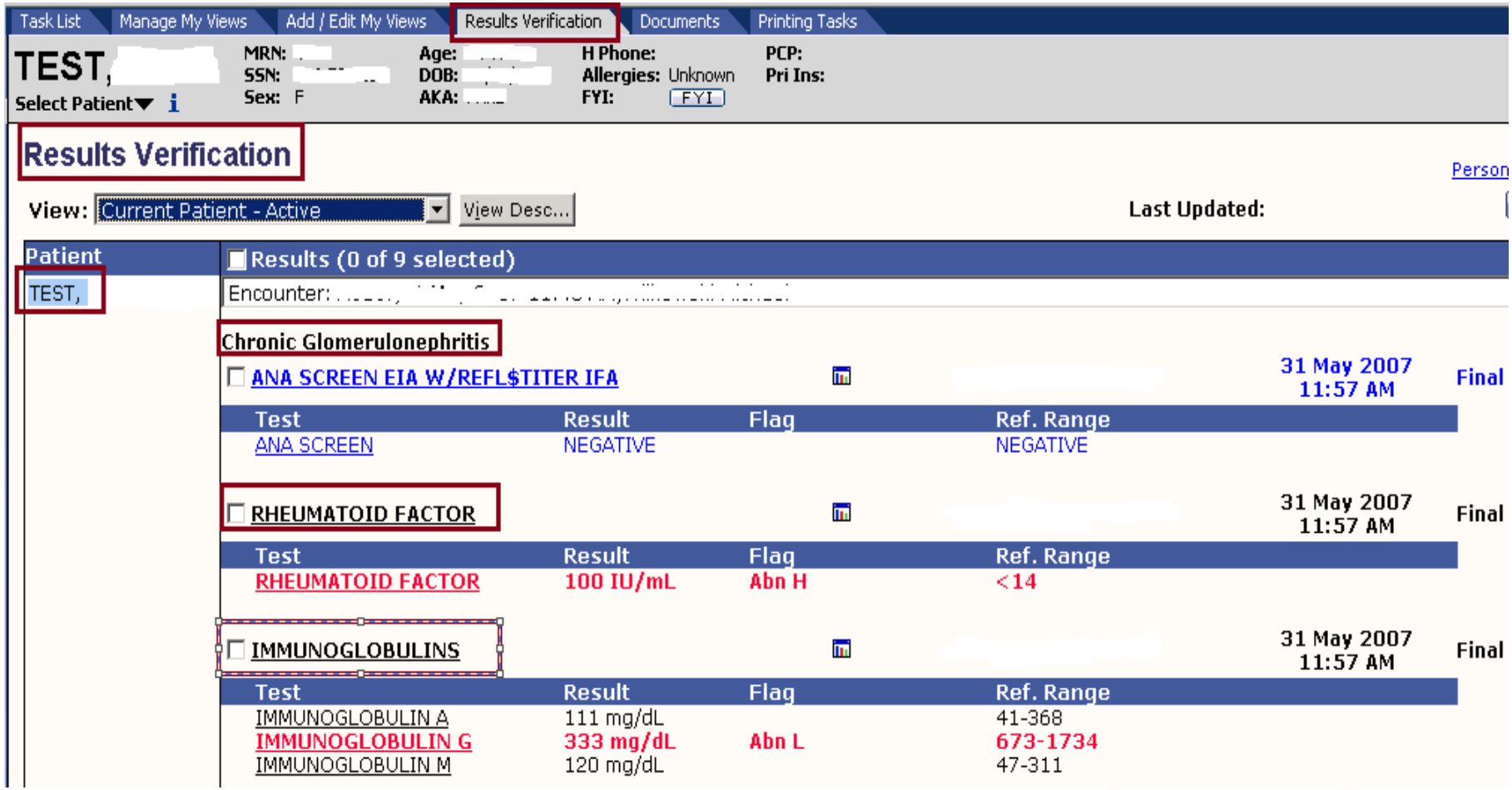
V10 to V11

- **In V10 there were two different areas to perform Order and Results Tasks**
- **These same areas were used by both the provider and non-provider**

V10 Order confirmation page



V10 Results Verification page



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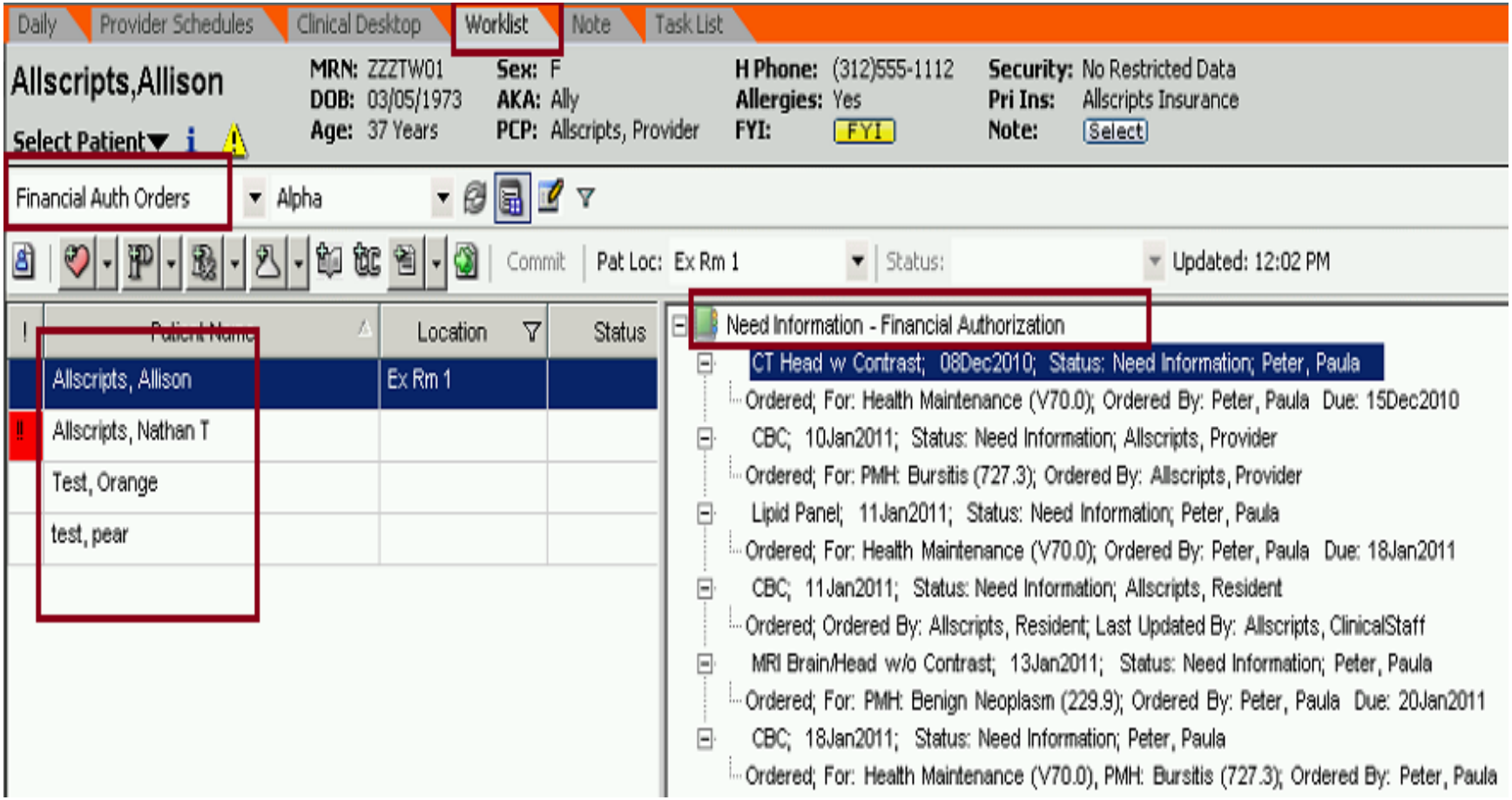
V11 Upgrade

During the V10 to V11 Upgrade we move the V10 Results Verification page over to V11 and call it the “Non-Provider” Cross Patient Worklist.

V11 Non-Provider Cross Patient WL used to perform Order and Result Tasks



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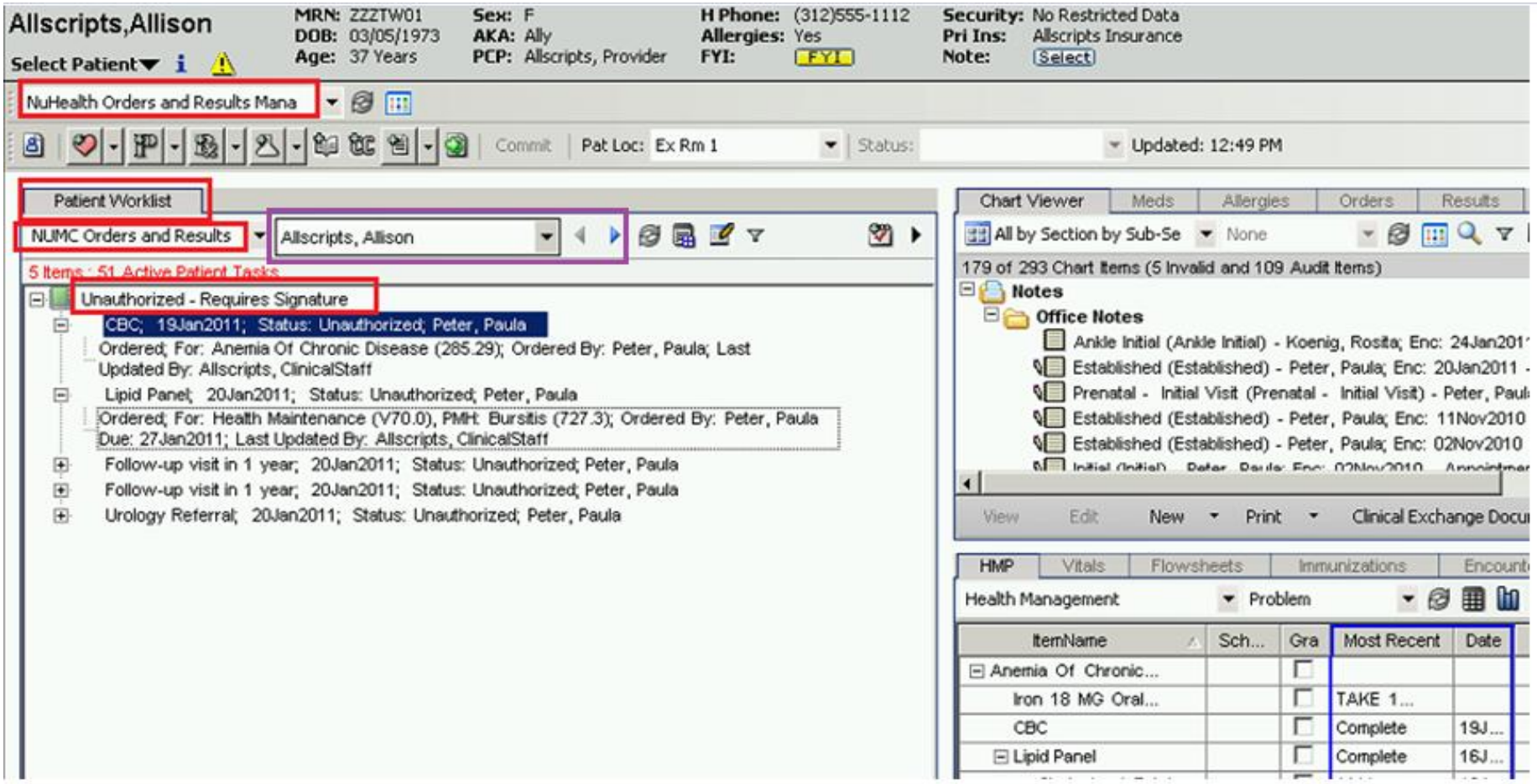
V11 Provider Patient Centric Worklist

The V11 Provider Patient Centric Worklist is new to v11 and instead of remaining a single form component it is now a component within the Clinical Desktop.

V11 Provider Patient Centric Worklist



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Why did it have to change, and do I have to use it?

Almost every provider I have ever met has asked me “why did they take away our order and results workpage” it worked perfectly the way it was in V10?

- ***It would defeat the purpose of the Clinical Desktop***
- ***Using the Cross Patient Worklist is not a part of any provider certified workflow***

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Task List vs. Worklist

- A **Task List** is where you **see** your Tasks (including Order and Results Tasks)
- A **Worklist** is where you **work** you Order and Results Tasks

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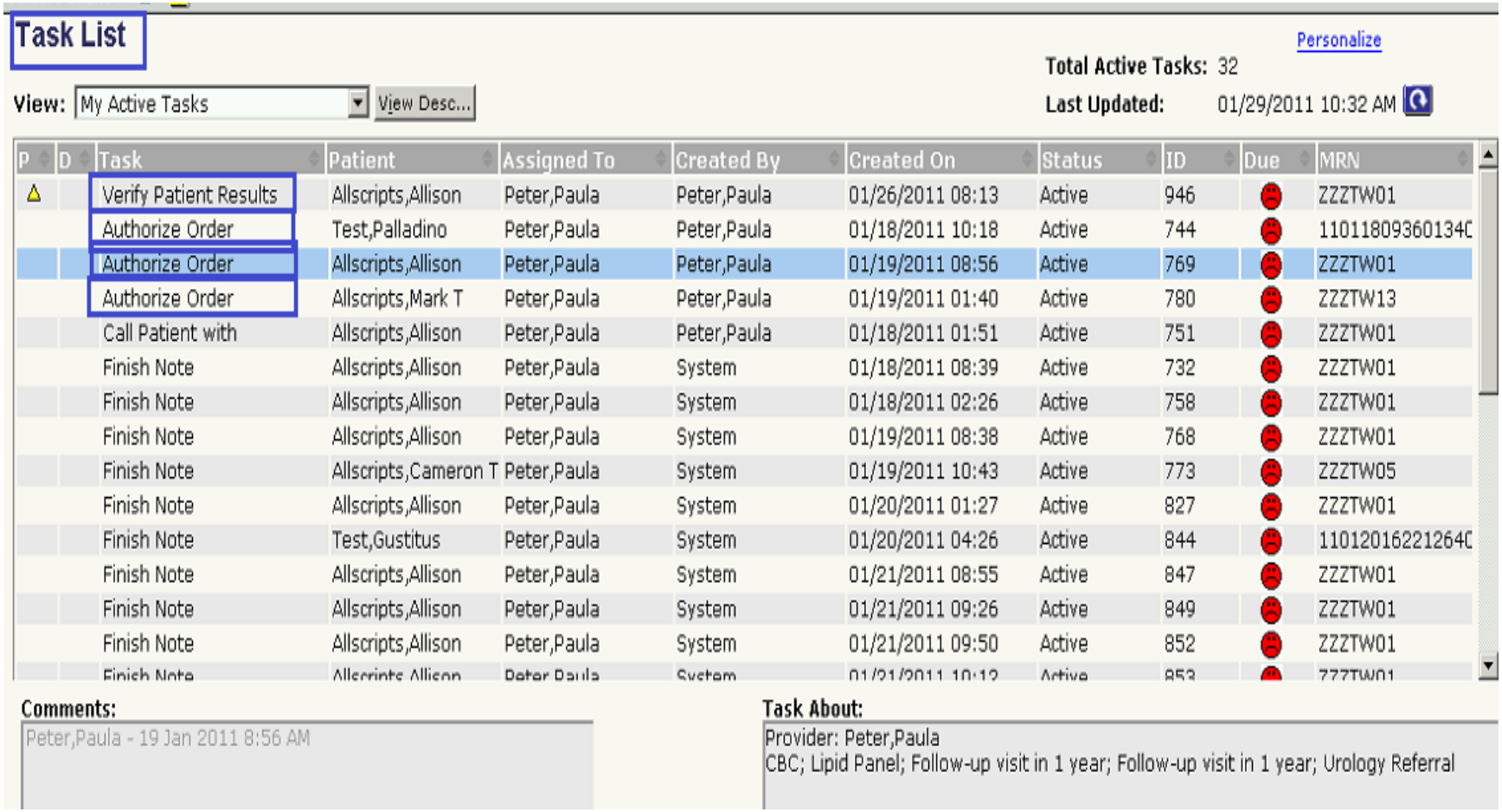
Task List V10 & V11



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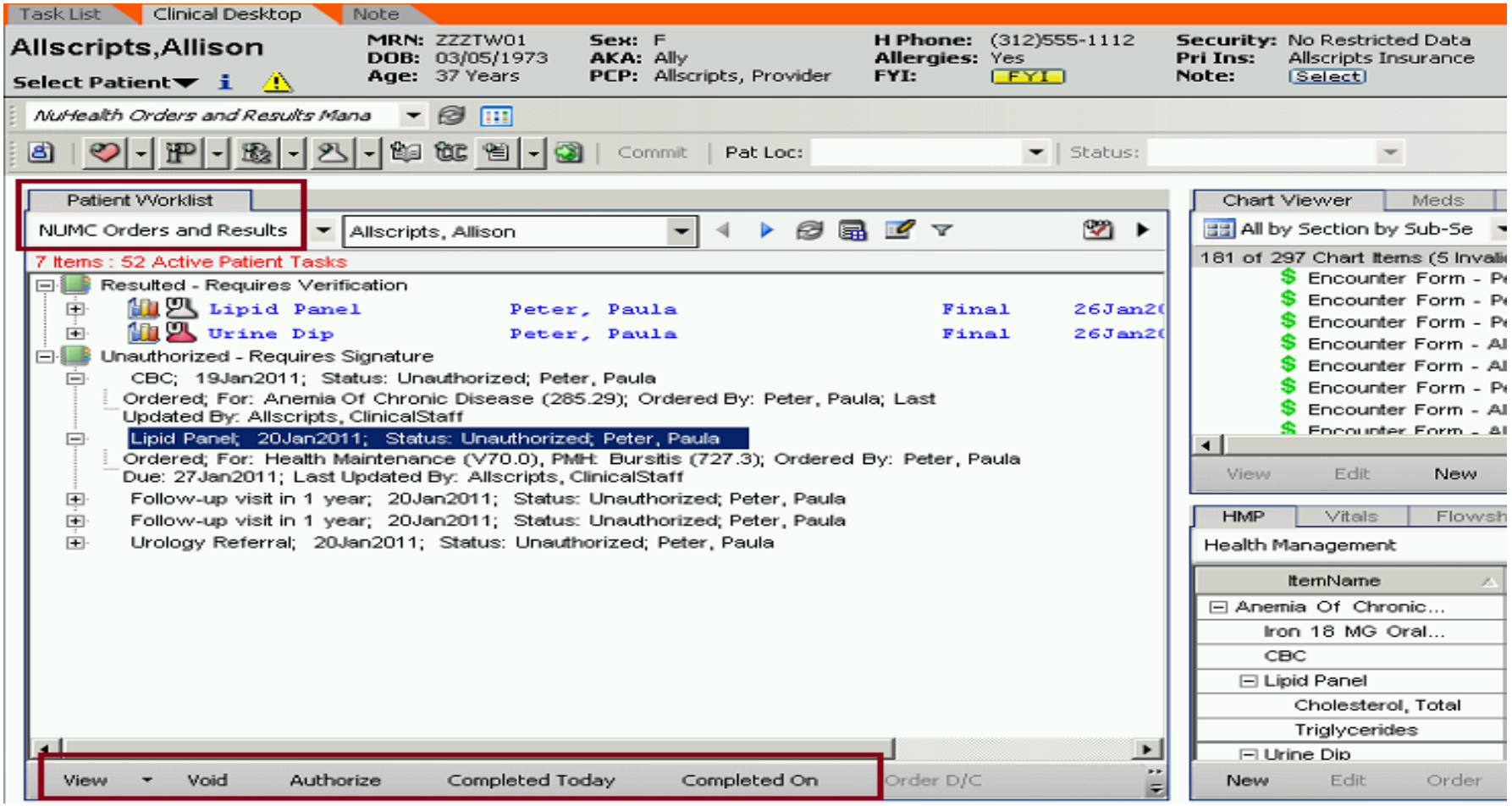
Worklist (Provider)



Building: steps 1-3

Step one

- **Security rights to build the worklists**

  In order to begin building worklists, the administrators (UCs/Client UCs) must first have the security rights

Step two

- **The “WorkDefAdmin” Workspace**

  This must be added to the TWAdmin Menu

Step Three

- **The “Worklist” component**

  This must be added to the WorkDefAdmin Workspace

UC Worklist Security And WorkDefAdmin

Refer to the Galen Wiki article

http://wiki.galenhealthcare.com/Worklist_View_Editor

Security

- Login as TWAdmin
- Security
- Classification
- Workspace View – Edit
- Worklist View Administration
- Worklist View – Edit

WorkDefAdmin & Worklist

- Login as TWAdmin
- Click Admin
- Click Menu
- Search for TWAdmin VTB (Not TWAdmin WP)
- Click on WorkDefAdmin
- Click Edit, Edit Menu Items, Add
- Search for Worklist, add and save

Building: steps 4-6 (hands-on)

Step four

- **Build the Order and Results Provider Worklists**
  - Order and Results Worklist, Orders Worklist and Results Worklist

Step five

- **Assign Worklist Views to Users**

Step six

- **Build a Order and Results Clinical Desktop View named…**
  - *"Client name* Order and Results Worklist"
  - Check the boxes of the worklists you just created
  - Set the Default View to "*Client name* Order and Results Worklist"

Building: steps 7-8

Step seven

- **Set the General Preference of "WorkspaceViewTasks" to…**
  - "*Client name* Order and Results Worklist"

Step eight

- **Test your Worklist Workflow**

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Demo Build Steps

AHS Delivered Worklists

Allscripts delivers several of the most commonly used Worklists for the administrators convenience. These AHS delivered Worklists are “View Only”. As with any AHS delivered item, these Worklists should not be used, but rather copied and renamed. This allows your Worklists to remain intact when AHS delivers an update or upgrade to their delivered Worklists.

AHS Delivered Worklists

- All Items (never activate)
- Denied Fin Auth Orders
- Financial Auth Orders (Non-Provider)
- **Order Management**
- Orders Requiring FU (Non-Provider)
- Overdue Orders
- Specimen Collection (Non-Provider)
- Admin Orders (Non-Provider)
- Abnormal Results
- **Results Management**
- Results Reconciliation
- RV Requiring Supervision
- Order-Result Group Coverage
- **Order-Result Management**
- Order and Result Management

AHS Delivered Worklists

AHS Delivered Worklist Name	Description Of View
All Items (never activate)	Allscripts System View - All Items
Denied Fin Auth Orders (Non-Provider)	for orders that have been denied as part of the financial authorization process. This view meant to be worked by Providers to understand what orders were denied so that alternate plans can be created and communicated to staff and the patient.
Financial Auth Orders (Non-Provider)	for orders that require financial authorization. This view meant to be worked by clinical staff.
Order Management	Allscripts System View - Order Management
Orders Requiring FU (Non-Provider)	for orders that require additional information or being held to schedule a referral or follow-up apointment. This view meant to be worked by Front Desk or appropriate staff.
Overdue Orders	for Staff to work orders in an overdue status
Specimen Collection	for orders that require specimen collection. This view meant to be worked by clinical staff and/or ancillary.
Admin Orders	Medication orders requiring administration
Abnormal Results	for abnormal results that require verification by the current provider
Results Management	Allscripts System View - Results Management
Results Reconciliation	for resulted orders that were updated/reassigned to Unknown, Ordering Provider and require reconciliation
RV Requring Supervision	for those ordering providers that need their result verification activities supervised (assumed that ordering provider and authorizing provider differ)
Order-Result Group Coverage	shared worklist for orders that require authorization and results that require verification (or marked as reviewed) per protocol for group coverage. **Add Auth OR Ordering Providers to create specific coverage groups as appropriate by usage/purpose***
Order-Result Management	for prescription or non-medication orders that require authorization and results that require verification (or review when CC'd) by the current provider
Order and Result Management	Allscripts System View - Order and Result Management

Understand what you are building

Whether using the AHS delivered Worklists for reference or not, it is important to know what you are building and why.

Know your Tasks

To create a Worklist you must know your Tasks.

For example if you are going to build an "**Order and Results Worklist**" so that a provider may Authorize their Orders and Verify their Results, you must look at those two tasks.

Order Tasks

- ABN Order Follow-up
- Order Info – F/up
- Audit Order Int
- Auth Order Int
- **Authorize Order**
- Authorized Order
- Call Order
- Denied Financial Authorization
- Dispense Order
- Expired Order
- Financial Auth
- Go to Order
- Immunization Admin
- Obtain ABN Order
- Order Charge Int
- Order Info
- Order Info – Find
- Order Info – Image
- Order Info – Lab
- Order Info – Other
- Order Info – Problem
- Order Info – Test
- Order New Int
- Order Notification
- OrderInfo - Additional Info
- Order-Lab Feedback
- Overdue Order
- Perform Order
- Print Requisition

Result Tasks

- Call Pt with Result Call ResultsN (cited in Note)
- Call ResultsR (Not cited in Note)
- Go to Result
- Mail Results to Patient
- Print Label
- Print Result
- Print Result for Chart
- Print Results for CC
- Result Invalid
- Review Results
- Schedule Results F/Up
- **Verify Patient Results**

Authorize Order Task

"The intent of this task is to notify an Authorizing provider that an order has been entered in the system by another user that Requires their Authorization and, or Signature"

This task is applicable to Medication and Non Medication Orders

Verify Patient Results Task

"This task provides notification that a result is available for verification. The task is created when a result is filed that Requires Verification."

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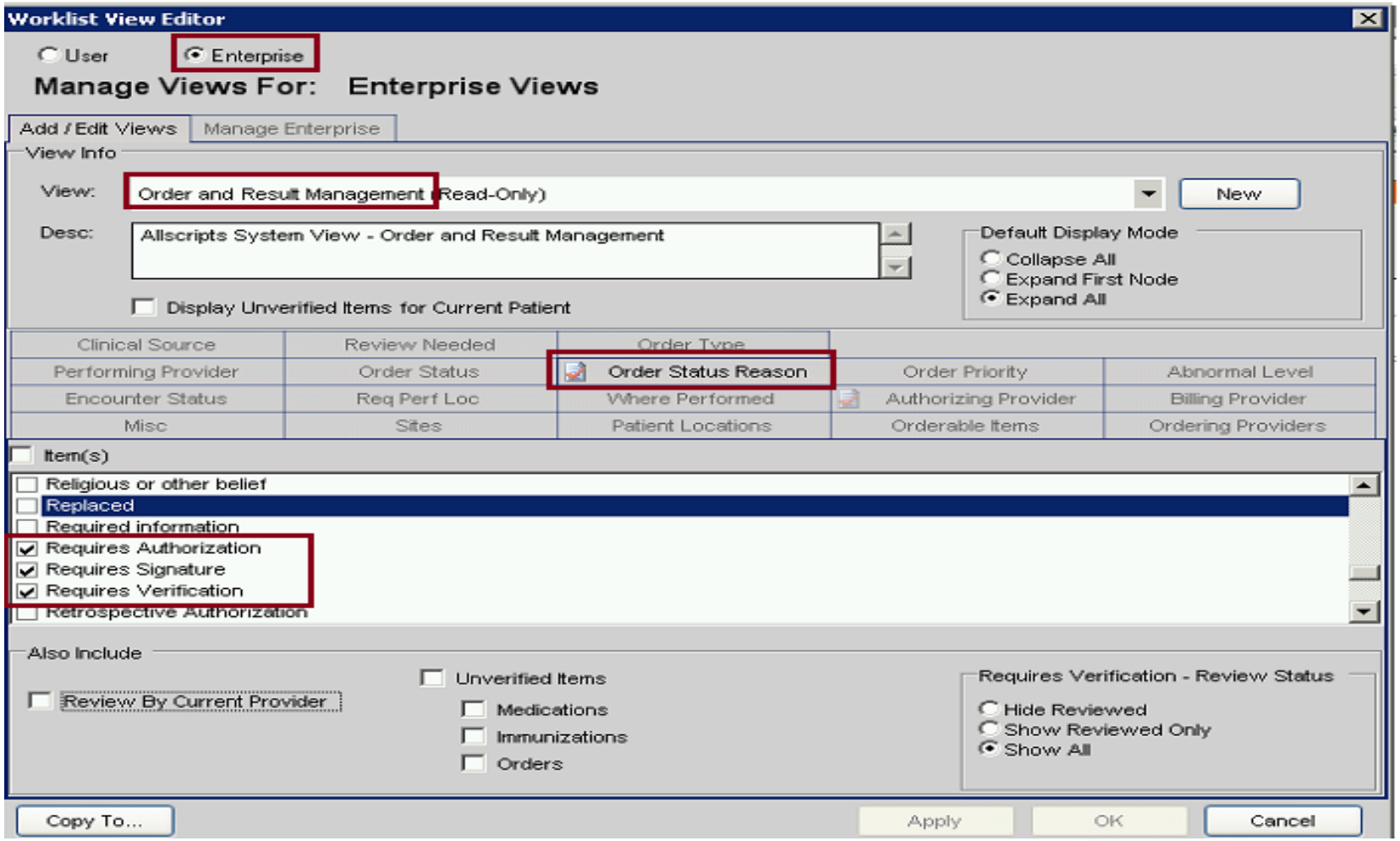
Back to Demo

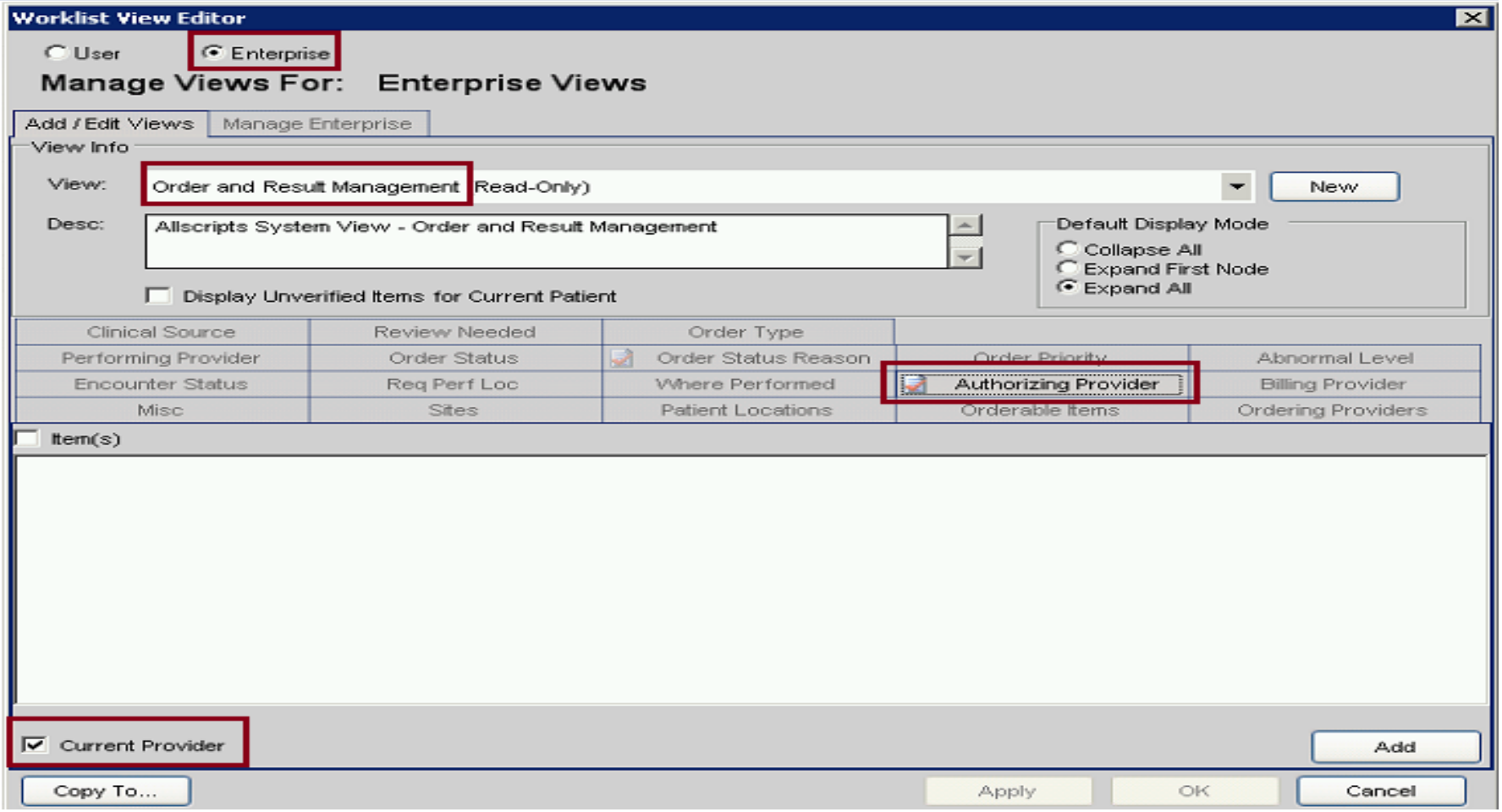
Task to Worklist



Who is allowed to see the is Worklist

Now that the reasons for the worklist have been identified, we need to tell the system who will be able to see it. For this particular worklist we want "*authorizing providers only*" to "see only their order and result tasks."

Authorizing Provider Order and Results



Non-Provider Cross Patient Worklists

The Non-Provider Worklists are built the same way, but with different Tasks in mind. Let's take Orders Tasks

For example; A Non-Provider may be someone in Billing and this person may have the job of obtaining **Financial Authorization** before an Order can be Authorized by the Provider, or this person may be a nurse who needs to **administer an immunization** per the Providers orders.

Basically anything a Provider is not required to do themselves

Example of Non-Provider Order Tasks

- ABN Order Follow-up
- Order Info – F/up
- Audit Order Int
- Auth Order Int
- Authorize Order
- Authorized Order
- Call Order
- Denied Financial Authorization
- Dispense Order
- Expired Order
- **Financial Auth**
- Go to Order
- **Immunization Admin**
- Obtain ABN Order
- Order Charge Int
- Order Info
- Order Info – Find
- Order Info – Image
- Order Info – Lab
- Order Info – Other
- Order Info – Problem
- Order Info – Test
- Order New Int
- Order Notification
- OrderInfo - Additional Info
- Order-Lab Feedback
- Overdue Order
- Perform Order
- Print Requisition

Non-Provider Cross Patient Worklists

Now let's look at some Result Tasks

For example; A Non-Provider may be a nurse who has the job of **calling a patient back with their "Test Results**" or scheduler who has the job of scheduling Patients for **follow-up appointments due to their Test Results.**

Again, anything a Provider is not required to do themselves

Non-Provider Result Tasks

- **Call Pt with Result**
- Call ResultsN (cited in Note)
- Call ResultsR (Not cited in Note)
- Go to Result
- Mail Results to Patient
- Print Label
- Print Result
- Print Result for Chart
- Print Results for CC
- Result Invalid
- Review Results
- **Schedule Results F/Up**
- Verify Patient Results

Financial Authorization Task

The system creates this task when the order associated with the task requires **financial authorization.** Financial Auth is set to Needed.

Schedule Results Follow-up Task

When a result is verified with a patient communication action of "**Schedule Appointment** to Discuss Results"

“V11 Worklists”
The end

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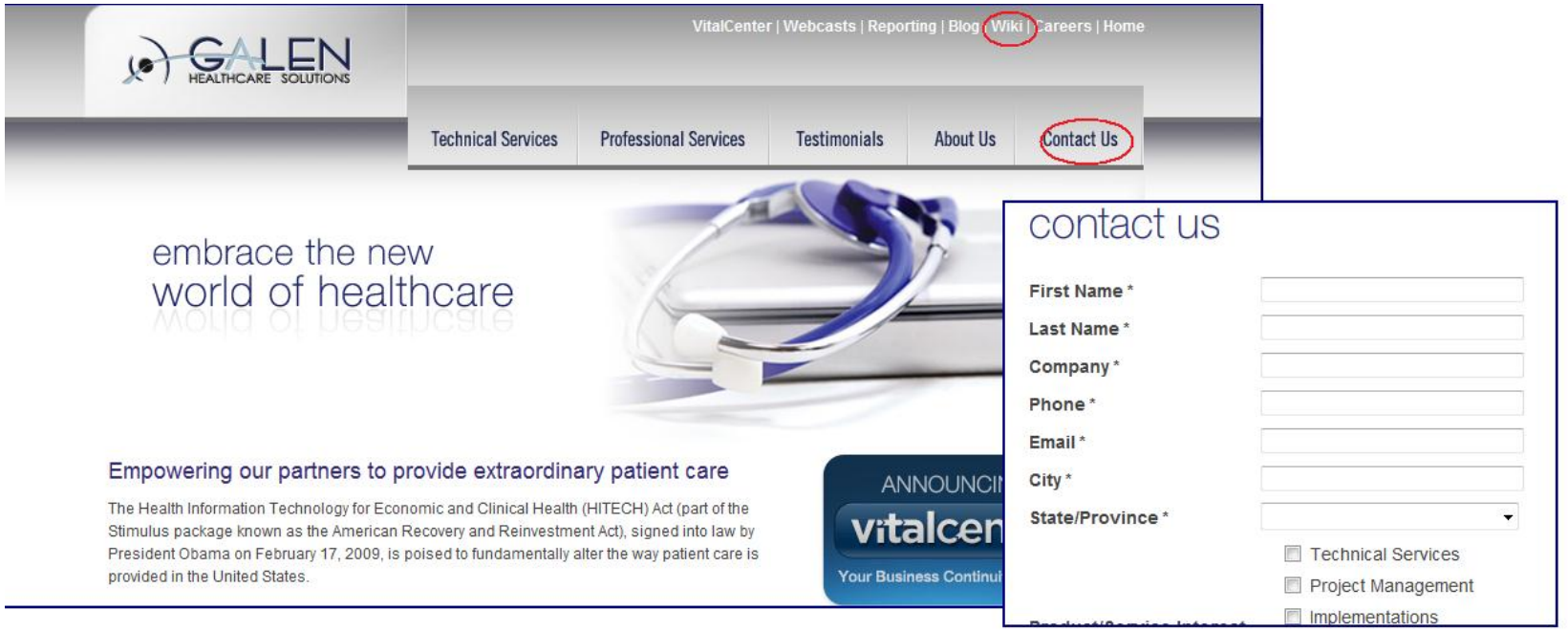
Thank you for joining us today, for additional assistance….

You can contact us through our website at

www.galenhealthcare.com



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