



OrderManager[®]

Physician Office User Guide

NOTE: This document does not contain PHI



Contents

Physician office user roles and order work flow	3
Logging into OrderManager®	5
Searching for an existing patient	7
Adding a new patient.....	8
Placing an order	9
Check medical necessity	15
Today's Patients.....	19
New work queue view	23
Work queue Management: Date Filters	25
Work queue filters: Facility, Primary Insurance, and Patient Last Name	26
Work queue filters: Order Source	28
Work queue filter: Order Status	29
Work queue filter: Account Status.....	30
Work queue filter: Alerts	31
Alert actions	32
Column configuration	32
Signature pending orders	34
Draft orders	35

Physician office user roles and order work flow

Physician office admin

The physician office admin can perform the following actions:

- Add new users
- Send and receive orders from hospitals and ancillary facilities
- Create worksheets
- Edit physician and physician office operator details
- Add patient
- Edit patient information
- Place order to physician or the facility
- Search orders
- Create work queue
- Cancel orders
- Duplicate an order
- View order history
- Communicate with facility about patient's orders
- Monitor signature pending orders, draft orders and alerts

Physician office operator

- The physician office operator can perform all the actions as a physician office admin except add new users and create worksheets

Physician

The physician can perform the following actions:

- Send and receive orders from clinics, hospitals and their ancillary facilities
- Authorize signatures on the sign-pending orders
- Search orders
- Modify patient orders (if ABN not signed by the patient)
- Create worksheets
- Perform the same actions of the physician office admin and physician office operator

Order work flow

- Search for existing patients – Once the patient is found, their demographic, employer, guarantor and insurance information can be updated. The next step is to create an order.
- Add new patients – Once the patient is added, their demographic, employer, guarantor and insurance information is entered. The next step is to create an order.
- Key order creation fields:
 - Ordering physician
 - Associated facility
 - Priority
 - Reason for exam
 - Order Instructions
 - Diagnosis code
 - Procedure code
 - Attachments if applicable
- Schedule information
- Authorization information (optional, based on facility requirements)
- Medical necessity check (optional, based on facility requirements)
- Placement of the order or save as a draft order
 - Draft order is selected when there is incomplete information to place an order
 - Allows for attachments to be associated
- The placed order is sent to the physician for their signature unless the physician office admin has order signature authority
- The order is then sent to the facility to be scheduled



Logging into OrderManager®

- Access the following link from your Internet Explorer (version 8 or higher):
<https://ordersmart.passporthealth.com>
- Enter user name and password
- Select login

- Upon initial login, the user will be prompted to answer three security questions, along with their registered email address.
- Once complete select submit



Password Recovery Setup

Security Questions

Answer the security questions below. These questions will help us verify your identity when you forget your password.

1) What are the LAST four digits of your Social Security Number?

2) What is your place of birth?

3) In what CITY were YOU BORN?

Your email ID

Your temporary password will be sent to your registered email id.





- If the entered user name or password is incorrect, the following warning message will display “Invalid User Name or Password.”
- Select the reset button and enter the user name and password, then select the login button. By selecting reset, users can reset forgotten passwords. This feature will direct them to the password recovery questions. Users disabled by an administrator cannot reset their own password.
- For password reset and forgot password procedure security, users will be prevented from using their past 13 passwords.
- After logging into OrderManager the user defined work queue will default/display

Patient	Order Date/Time	Diagnosis	Procedures	Physician	Order Status	Action
Aubry, Timothy (71Y_M)	03/23/2015 11:12	V70.0 ROUTINE MEDICAL EXAM	85025 CBC AND DIFFERENTIAL, AUTO Schedule	Bartholomew, Kenneth	Signed - Placed	[X] [Print] [Refresh]
	03/11/2015 13:52	307.81 TENSION HEADACHE	74185 CHG MIRA ABD W CONTRAST Schedule	Bartholomew, Kenneth	Signed - Placed	[X] [Print] [Refresh]
	03/11/2015 12:53	V70.0 ROUTINE MEDICAL EXAM	85025 CBC AND DIFFERENTIAL, AUTO	Bartholomew, Kenneth	Unsigned - Transcribed	[X] [Print] [Refresh]
	03/09/2015 15:34	V70.0 ROUTINE MEDICAL EXAM	85025 CBC AND DIFFERENTIAL, AUTO	Bartholomew, Kenneth	Unsigned - Transcribed	[X] [Print] [Refresh]
	03/09/2015 14:06	307.81 TENSION HEADACHE	74185 CHG MIRA ABD W CONTRAST Schedule	Bartholomew, Kenneth	Signed - Placed	[X] [Print] [Refresh]
	03/09/2015 13:49	V70.0 ROUTINE MEDICAL EXAM	85025 CBC AND DIFFERENTIAL, AUTO	Bartholomew, Kenneth	Unsigned - Transcribed	[X] [Print] [Refresh]
	03/06/2015 13:47	V70.0 ROUTINE MEDICAL EXAM	85025 CBC AND DIFFERENTIAL, AUTO Schedule	Bartholomew, Kenneth	Signed - Placed	[X] [Print] [Refresh]
	03/03/2015 13:48	V70.0 ROUTINE MEDICAL EXAM	85025 CBC AND DIFFERENTIAL, AUTO	Bartholomew, Kenneth	Unsigned - Transcribed	[X] [Print] [Refresh]
Blackwell, Elizabeth (94Y_F)	04/17/2015 07:53	V70 GENERAL MEDICAL EXAMINATION	85025 CBC AND DIFFERENTIAL, AUTO	Bartholomew, Kenneth	Draft	[X] [Print] [Refresh]
Test, labPatient (46Y_F)	03/12/2015 11:42	V70.0 ROUTINE MEDICAL EXAM	001650 PainComp(R) Profile - Blood Schedule	Bartholomew, Kenneth	Unsigned - Placed	[X] [Print] [Refresh]

Searching for an existing patient

Patient search : y

2 patients found.

Name	Sex	DOB (Age)	Home Phone	MRN	SSN	Street	City / State
yash, jg  	M	1/2/1968 (46Y)	(111)111-1111	0987654321	000-00-0000	Abc anywhere street	City, NJ
Younger, Charlie  	M	10/15/1945 (68Y)		234234	000-00-0000		

- Enter the patient's name in the patient search box and select the search icon
- The page navigates to the search results page where you can select your patient



- Select the Place Order icon to place a new order for the patient



- Select the Show Patient's Orders icon to view the history of the patient's orders

Adding a new patient

- Select the add new patient tab

PASSPORT
Part of Experian
Order Smart

NEW PATIENT

Search Patient

Orders Worksheets Office Setup

Demographics Employer Guarantor

* Last Name : * First Name : Middle Name :
 * DOB : * Gender : Male Female Unknown Marital Status : Unknown
 MRN : SSN :

Contact Information

Street : Other :
 City : State : Zip : -
 * Home Phone : * Cell Phone : Email :

- Enter patient demographic, employer and guarantor information.
 - Mandatory fields will have an *
- Enter primary insurance information and secondary insurance information if applicable
 - Entry of self as the subscriber will default patient name and date of birth

Demographics Employer Guarantor

* Last Name : * First Name : Middle Name :
 * DOB : * Gender : Male Female Unknown Marital Status : Unknown
 MRN : SSN :

Contact Information

Street : Other :
 City : State : Zip : -
 * Home Phone : * Cell Phone : Email :

Insurance

Primary

Subscriber Relation To Patient : Self
 Name : Last First Middle DOB :
 Alt. Member Name : Last First Middle
 Carrier : Phone Number :
 ID (Policy) : Group Number :

Secondary

Subscriber Relation To Patient : Self
 Name : Last First Middle DOB :
 Alt. Member Name : Last First Middle
 Carrier : Phone Number :
 ID (Policy) : Group Number :

[Add another insurance](#)

Save

- Click save and the place order button and the message “patient added” will display

Placing an order

- Select the ordering physician drop down and select the appropriate physician

- The physician office name defaults

Facility : Cogdell rehab
 Priority : --Select Facility--
 Reason for: Cogdell rehab

- For multiple facilities, select the facility drop down and select the appropriate facility
- Select the priority drop down and select the appropriate priority

Priority : --Select Priority --
 Reason for: --Select Priority --
 Order inst: ASAP
 agnosis: Routine
 Other

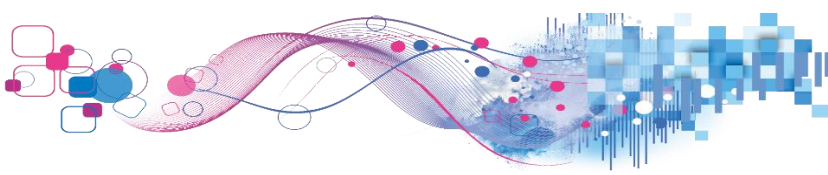
- Enter the diagnosis code. (There are two options to enter the diagnosis code)
 - By default, ICD-9 will be selected. ICD-10 mapping and effective date are configurable.

Diagnosis ▶ ICD-9 ICD-10
 250.00
 Pr 250.00 DIABETES UNCOMPL TYPE II

Diagnosis ▶ ICD-9 ICD-10
 diab|
 Pr 249 SECONDARY DIABETES
 Pr 250 DIABETES MELLITUS
 M 250.0 DIABETES MELLITUS WO COMP
 250.00 DIABETES UNCOMPL TYPE II

- If an incorrect ICD code was entered, select X to delete


Diagnosis ▶ ICD-9 ICD-10
 346.21 VAR MIGRAINE INTR NO SM X ★
 Procedures ▶ Click here to delete



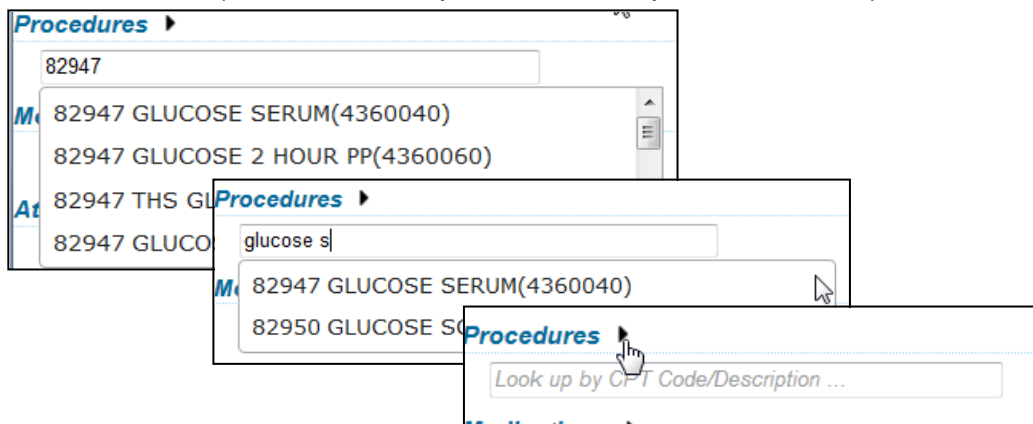
Option 1

- The user can search and select via autosuggest by entering the ICD code or description.

Option 2

- Select the Diagnosis  icon to access the Diagnosis worksheet, which is configured to the Physician, Physician Office and the Facility.
- Select the Diagnosis worksheet by clicking the check box
- Search and Select the diagnosis.
- Select the Done button at the bottom of the worksheet.


- Enter Procedures (there are two options to enter procedure code)



Option 1

- The user can search and select via autosuggest by entering the procedure code or description.

Option 2

- Select the procedures  icon to access the procedure worksheet, which is configured to the physician, physician office and the facility.
- Select the procedures worksheet by clicking the check box
- Search and select the procedure.
- Select the done button at the bottom of the worksheet

- If an incorrect procedure was entered, select X to delete

The screenshot shows a section titled "Procedures" with a search bar. Below the search bar, there is a list item: "93451 HC RIGHT HEART CATH" followed by a quantity of "1" and a delete button (X). Below this list item, there are three buttons: "Left", "Right", and "Bilateral".

The quantity of the procedure can be increased or decreased using the up and down arrows

- The specific left, right or bilateral study can be selected by accessing the appropriate button

Worksheets

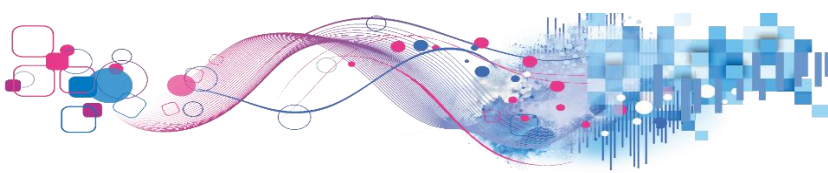
Note: Creating worksheets is not mandatory. Users can search and locate either the diagnosis codes and procedure codes through auto suggest.

- Worksheets are used for diagnosis codes and procedure codes. They are configured to the physician, physician office and the facility.
 - Users can create tabs based on specialties and categorize codes under the relevant tab.
 - Users can mark the frequently used codes as favorites for easy identification.

Attaching a document to the order (attachment has to be in a PDF format)

The screenshot shows a section titled "Attachments (eg H&P)" with a search bar.

- An order must be saved as a draft prior to adding an attachment
- Select the attachments link
- The user can browse and select a saved PDF document
- The user will be prompted to select a document type from the list and then select upload



Select document types

Test.PDF.pdf

Select document types

Test.PDF.pdf

- Select...
- Select...
- ABN
- AuthorizationStatement
- BookingSheet
- InsuranceCards
- Miscellaneous
- MNC
- Requisition
- Script
- Script1
- Trash
- Unassigned

None

Test.PDF.pdf Done

Scheduling details

Scheduling Details : Scheduled To be scheduled None

Scheduled

Scheduling Details : Scheduled To be scheduled None

Patient Class :

Date of Service : :

June 2015						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

- Select the scheduled radio button which prompts date of service and time to be entered
- Select patient class from drop down (Inpatient, Outpatient)
- Select the calendar icon
- All previous days and facilities non-working days will be greyed out
- Select date
- Select the time from the drop down

To be scheduled

- Select the to be scheduled radio button
- Select “patient will call you” or “call patient” at
 - If selecting call patient, phone number is required
- Select patient class from drop down (Inpatient, Outpatient)
- Click on the calendar to select the anticipated date of service
- Additional order information can be entered in the note section
- Select the none radio button if the order does not require scheduling

Authorization details

- Select the authorization dropdown and select appropriate option.

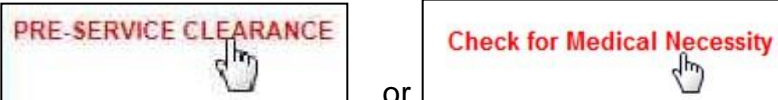
If the minimum time required to obtain authorization from payers is two business days, and the user selects the same day or following day, an alert will be displayed. The user will then have to adjust the date of service accordingly. Minimum time requirement will vary by facility.

Additional details: Comments can be entered in this section

Additional Details :

Check medical necessity

Note: requirement varies by facility



82947 GLUCOSE SERUM Passed

Policy reference ID : [190.20](#)

? For Routine Diabetic screening per year? No

? If Pre-Diabetic, does the test frequency exceed one screening per 6 months? No

- Select check for medical necessity on the place order page
- The medical necessity check window displays with the selected procedures
- Select the rule on which the medical necessity needs to be checked by accessing the dropdown button if different than the default rule set in place
- Select the check button
- The pass or fail results will display

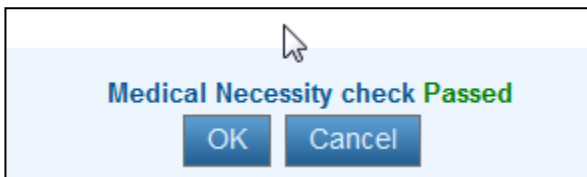
CHOMP PROD PARTA/PARTB

82947 GLUCOSE SERUM Passed

Policy reference ID : [190.20](#)

? If Pre-Diabetic, does the test frequency exceed one screening per 6 months? No

? For Routine Diabetic screening, does the test frequency exceed 1 per year? No



- Select OK to save the results
- If the procedure has a frequency question, select yes or no from the dropdown
- If the procedure does not exceed the particular time period the procedure will pass the medical necessity check
- If the procedure exceeds the time limit, the procedure fails

CHOMP PROD PARTA/PARTB ▾ Check

82947 GLUCOSE SERUM **\$56.05** Failed

Policy reference ID : [190.20](#)

? If Pre-Diabetic, does the test frequency exceed one screening per 6 months? Yes ▾

? For Routine Diabetic screening, does the test frequency exceed 1 per year? No ▾

Failed medical necessity

CHOMP PROD PARTA/PARTB ▾ Check

82947 GLUCOSE SERUM **\$56.05** Failed

Policy reference ID : [190.20](#)

? If Pre-Diabetic, does the test frequency exceed one screening per 6 months? Yes ▾

? For Routine Diabetic screening, does the test frequency exceed 1 per year? No ▾

Medical Necessity check Failed **Total estimated cost: \$56.05**

Has the patient accepted responsibility for payment?

No
 Yes, Option 1
 Yes, Option 2
 Unknown

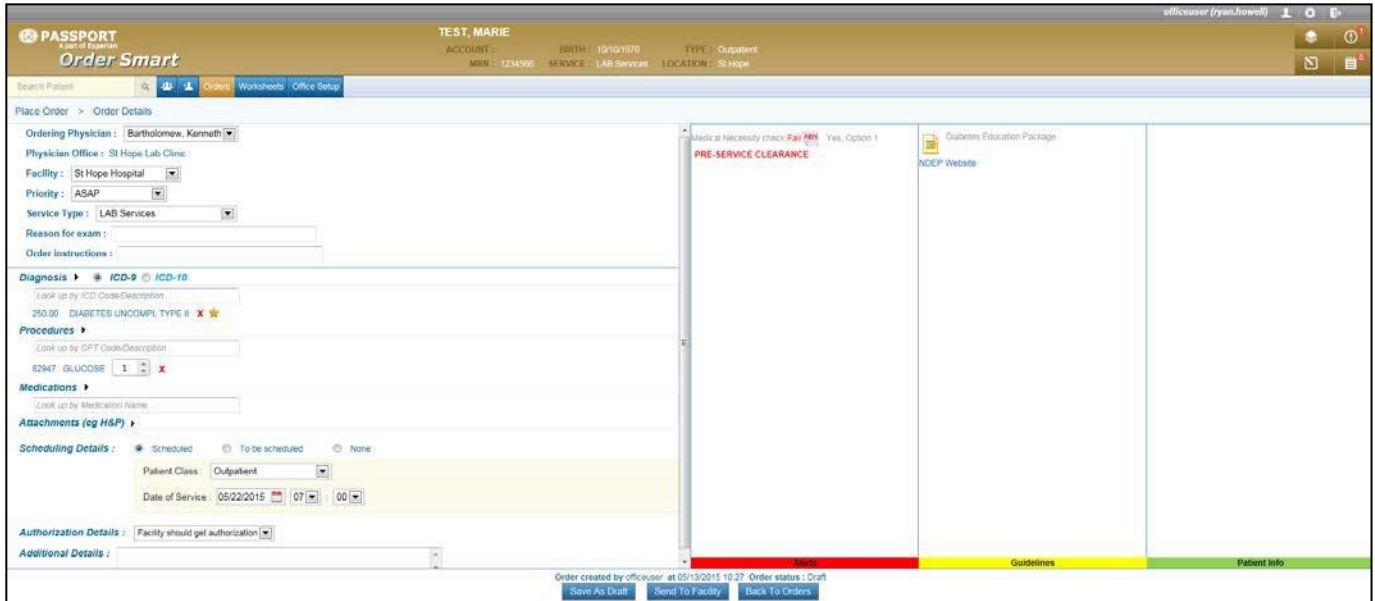
ABN finalized **Signed on paper**

View ABN
Print ABN
OK
Cancel

- Has the patient accepted responsibility for payment?
 - Select the appropriate option by clicking on the corresponding radio button
- ABN finalized: If the patient accepts the responsibility, check this box
- Signed on paper: If the patient signature is captured on paper, check this box
- View ABN: Select this to view ABN
- Print ABN: Select this to print ABN

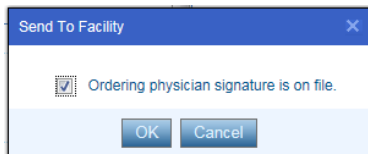
display in the alerts section

- Select OK to finalize
- The medical necessity results will

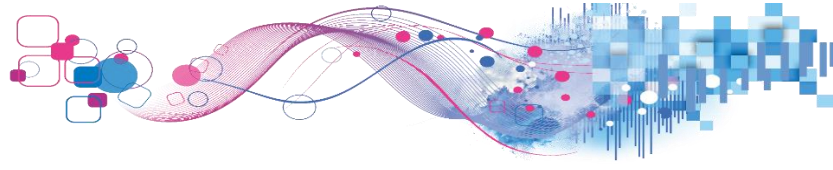


Order placement

- Select send to physician
 - If the physician has delegated the signing authority, the user can send the order directly to the facility by selecting Ordering physician signature is on file and OK.



- If the physician has not delegated the signing authority to the user, the user should send the order to the physician
- Message displays, “Do you want to print requisition form?” Select yes to print the form or no to cancel the process
- Select save as draft if the order information is not complete



PASSPORT Order Smart

TEST, MARIE
 ACCOUNT: 1234566 BIRTH: 10/10/1970 TYPE: Outpatient
 MIN: 1234566 SERVICE: LAB Services LOCATION: St Hope

officuser (ryan.howes)

Search Patient: [] Orders Worksheets Office Setup

Place Order > Order Details

Ordering Physician: Bartholomew, Kenneth
 Physician Office: St Hope Lab Clinic
 Facility: St Hope Hospital
 Priority: ASAP
 Service Type: LAB Services
 Reason for exam:
 Order instructions:

Diagnosis: ICD-9 ICD-10
 250.00 DIABETES UNCOMPL TYPE II

Procedures: 82947 - GLUCOSE

Medications:

Attachments (eg H&P):

Scheduling Details: Scheduled To be scheduled None
 Patient Class: Outpatient
 Date of Service: 05/22/2015 07:00

Authorization Details: Facility should get authorization

Additional Details:

Medical Necessity check: **Fail** Yes, Option 1
PRE-SERVICE CLEARANCE

Diabetes Education Package
 NDEP Website

Print Order/Requisition Form
 Do you want to print order requisition form?
 Yes No

Order created by officuser at 05/13/2015 10:42 Order status: Draft
[Back To Orders](#)

http://statedemo01.passporthealth.com/order/generateOrderRequisition/or...

ST HOPE HOSPITAL
 720 Cool Springs Boulevard, Suite 200, Franklin, TN 37067 Phone: (615)215-3000

Patient Information					
Patient Name: Test, Marie	Medical Record #: 1234566	DOB: 10/10/1970	Sex: F		
Address: 100 3rd Avenue South Franklin, TN 37064		Phone Number: (615)123-4567	Account #:		
Primary Insurance: BCBS of Tennessee	Phone Number:	Group #: 1234	Policy ID: 987654321		
Sub Name: Test, Marie	Sub Employer: Franklin Grocery Stores	Relationship: Self			

Order Instructions		Facility Information	
Order Priority: ASAP		ST HOPE LAB CLINIC	

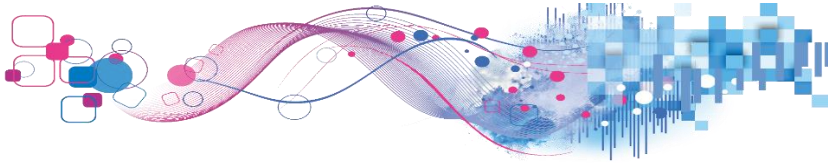
Reason For Exam

ICD Diagnosis Codes

250.00(DIABETES UNCOMPL TYPE II)

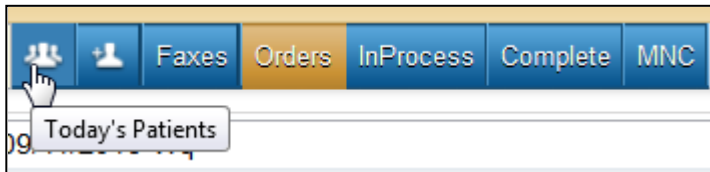
Order Code	Test Description	CPT Code	Container	Source	Priority	Status	Date of Service
117000630970	GLUCOSE	82947				Failed	

Order Information	
Ordering Physician: Bartholomew, Kenneth	Order Date: 05/13/2015 10:36 CDT
Physician Signature: <i>Bartholomew</i> 6421029-6562-4106-6749-ae1000713280 Dr. Bartholomew, Kenneth on 05/13/2015 10:36 CDT	
Physician ID: User ID: officuser	



Today's Patients

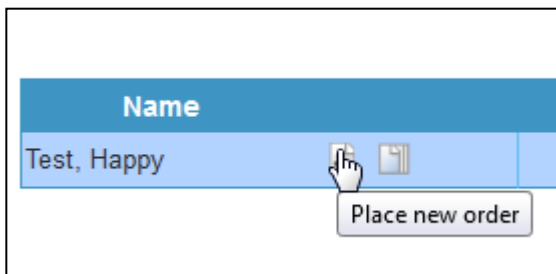
- Select the **Today's Patients** tab located on the home page to view patients that have had orders placed today



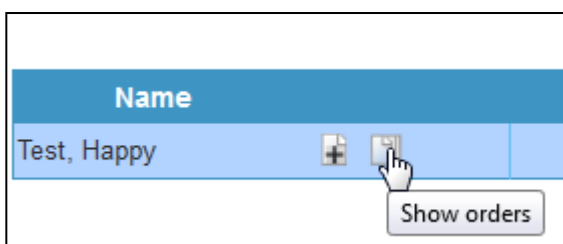
Today's Patients.								
Name	Sex	DOB (Age)	Home Phone	MRN	SSN	Street	City / State	
Test, Happy	M	10/10/1950 (63Y)	(111)111-1111	123	000-00-0000	New anywhere street	city, CT	

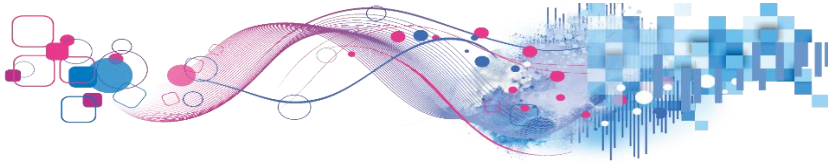
Place order on Today's Patients

-  Select the **Place new order icon**











-  Select the **Show orders icon** to view patient order history





2 orders found.

Order Date/Time	Diagnosis	Procedures	Physician	Order Status	Action
04/11/2014 16:54	250.00 DIABETES UNCOMPL TYPE II	82947 GLUCOSE SERUM	HENSALA, FREDRICKS A	Unsigned - Placed	   
04/11/2014 13:29	250.00 DIABETES UNCOMPL TYPE II	82947 GLUCOSE SERUM	HENSALA, FREDRICKS A	Draft	   

[Place New Order](#) [Back To Patients](#)

- The Show Orders page

- Allows users to place a new order, recreate an order, delete a draft and navigate back to patients.
- Lists all the orders including draft orders that are placed for the patients either by the physician office or by facility.
- Displays order date and time, diagnosis, procedures, physician, order status and action.

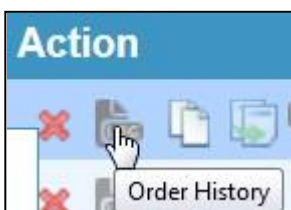
Actions



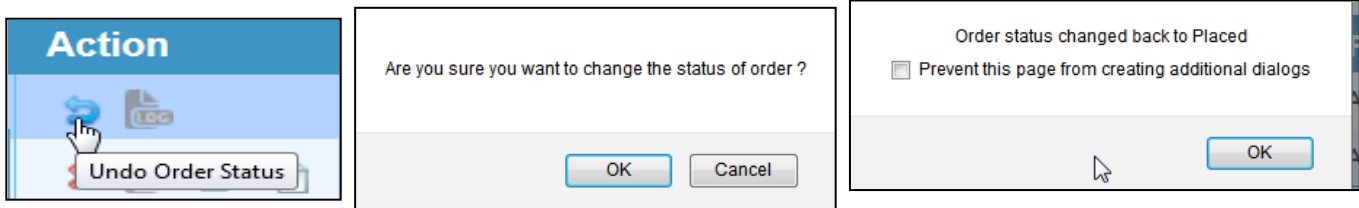
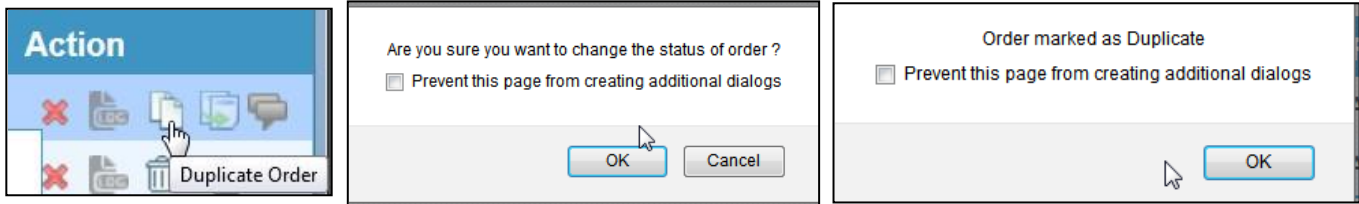
Cancel Order



Order History

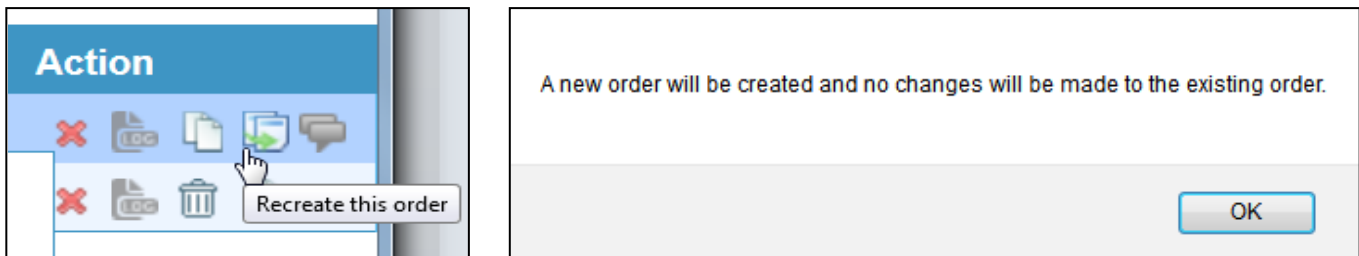


Duplicate Order

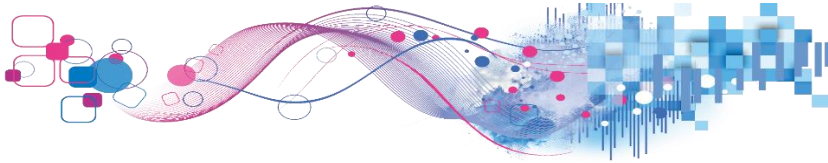


- Once the order is marked as duplicate, the order cannot fit in the work queue filters.
- The user can find the order through search criteria to change the status of the order.

Recreate order



- Select recreate order
- Select OK
- The place order page displays. Order details and remain the same or be edited.
- Select place order to place a new order for the patient.
- Select back to patient to return to the show orders page.
- Select save as draft. The draft order can be viewed from search patient show orders.



Alerts



Send an alert

- Select the alert icon
- In the order alerts type the message
- Select **Send Alert**
- Once the alert is sent the alert status can be viewed under **New** and **All**
- Select close when complete

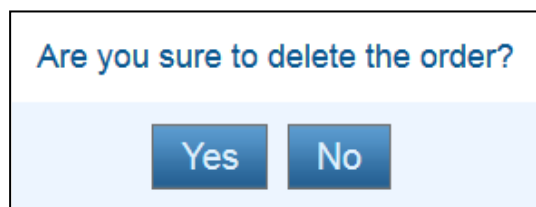
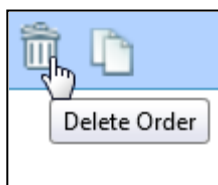
Work flow actions and alerts



Right side header access to:

- Order Alerts - messages
- Drafts – draft orders
- Signature Pending – pending physician signature, if not delegated
- Documents Pending – pending additional required documentation for orders

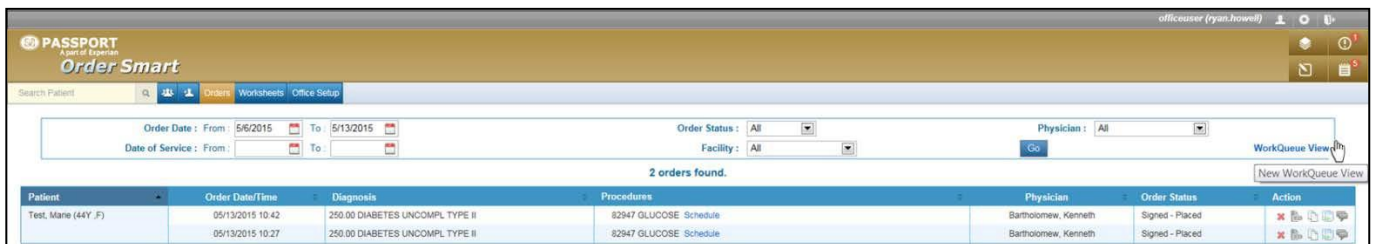
Delete draft order



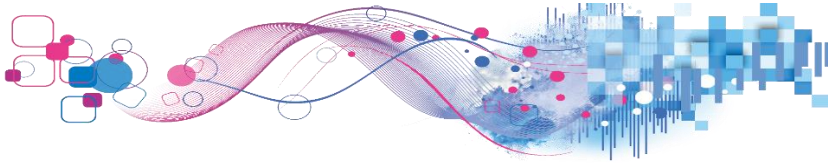
- The delete option is only available for draft orders
- To delete an order, select the **Delete** icon, then select **Yes**
- Once the order is deleted, it will be removed from the list of orders.
- You can also select **No** to cancel the process
- The following actions can be performed from the **Orders** tab:
 - Categorize the orders based on their order status, ordering physician, facility, orders date.
 - Cancel order
 - View order history
 - Recreate order
 - Duplicate order
 - Send notifications to the facility.
 - View order status “**Signed-placed**” and “**Draft Order**”
 - Print the requisition form for the signed-placed orders
 - Draft order: The order can be transformed to either sign-pending or signed-placed order.



New work queue view



- From the orders tab, select the **Work queue View** link
- The work queue page displays
- Select the expand **Work queue Search Criteria**



Creating Work queue: Only authorized users (admin users) can create and assign work queues to specific users or user groups.

- Access the work queue drop down and select create new work queue

Workqueue : Today WQ [dropdown] [refresh] [input] Search [checkbox] Global

-- Create New Workqueue --

Apply work queue filters

- The work queue management window contains 14 different categories that users can choose to create work queues

Workqueue : Today [dropdown] [refresh] Search [checkbox] Global

Facility [dropdown] Ordering Physician [dropdown] Order Date [dropdown] Inprocess Date [dropdown] Complete Date [dropdown] Admission Date [dropdown] Registration Date [dropdown] Service Date [dropdown] Patient Lastname [dropdown] Insurance [dropdown] Order Source [dropdown]

Order Date is Today X
Facility is ABC Hospital X

GO Reset Save Workqueue Save New Workqueue Configure Columns

1-1 of 1 Exclude Deferred Rows per Page: 30

Patient	Order Date/Time	Diagnosis	Procedures	Physician	Order Status
Dora, Emily (26Y)	04/15/2014 16:24	250.00 DIABETES UNCOMPL TYPE II	82947 THS GLUCOSE Schedule	ABEL, ALAN D	Signed - Placed

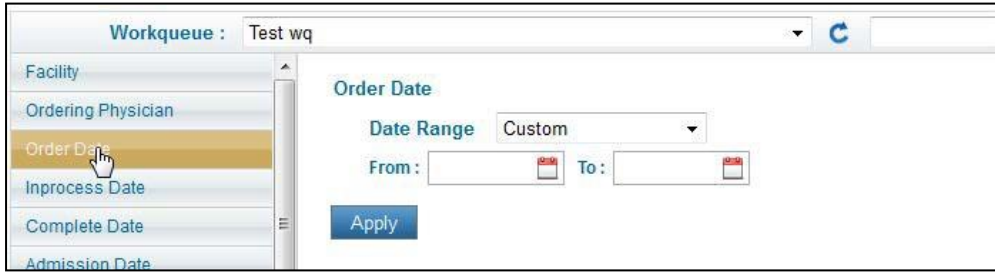
1-1 of 1 Exclude Deferred Rows per Page: 30

Workqueue : Test wq

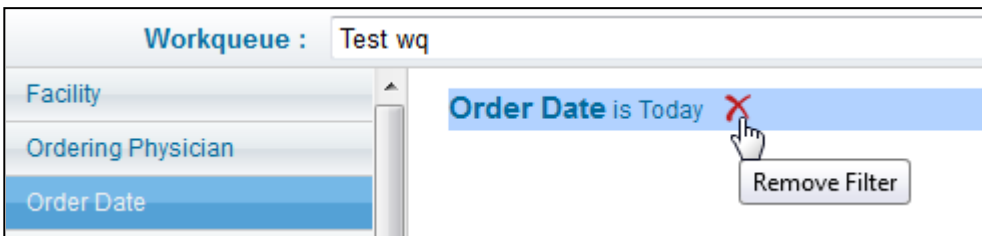
Facility [dropdown] Ordering Physician [dropdown] Order Date [dropdown]

Order Date is Today X

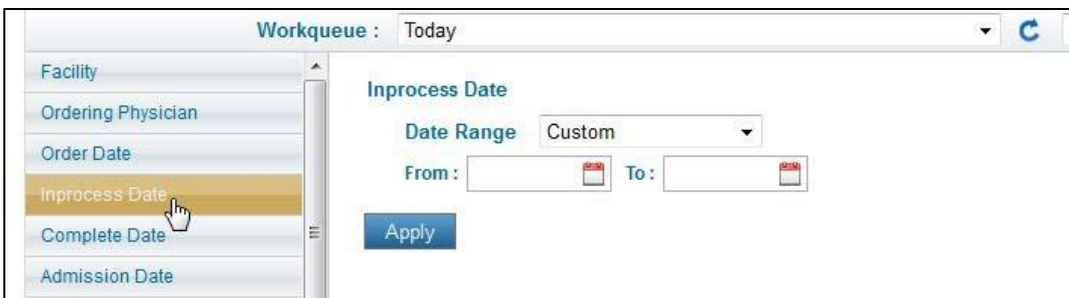
- Existing work queues can be managed and modified
- To add the filters to the work queue, the user will select the filters, enter the search criteria and select apply



- To remove the filters from the work queue, select the remove icon next to the work queue filter



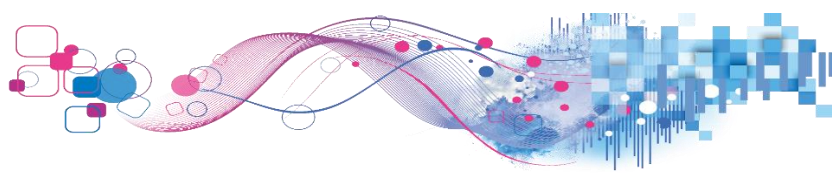
Work Queue Management: Date Filters



There are six available date options:

- Admission date
- Order date
- In process date
- Registration date
- Service date
- Complete date

Each selection has a dropdown from which the User can select a sliding date range or a custom hardcoded date range.



- Options
 - Custom (From and To dates)

 - Today
 - Yesterday
 - This week
 - Last week
 - 1st of this month
 - 1st of last month
 - Sunday of this week
 - Sunday of last week
 - Monday of this week
 - Monday of last week
 - Between (From and To dates)
- Once complete select **Apply**

Work queue filters: Facility, Primary Insurance, and Patient Last Name



Patient Last Name

Order Date is Today ✗
Patient Any Insurance is Electronic ✗

Apply

Give range of characters using comma(,) separator
Examples:
 [A-K] : Last name starting ranging from A to K
 [AK] : Last name starting with A and K
 [ABCDEFGHIJK] : Last name ranging from A to K
 SA : Last name starting with SA
 [a-f],john : Last name starting ranging from a to f or Last name starting with john

Facility

- Ordering Physician
- Order Date
- Inprocess Date
- Complete Date
- Admission Date
- Registration Date
- Service Date

Ordering Physician

in not in

Apply

Workqueue : Today

- Inprocess Date
- Complete Date
- Admission Date
- Registration Date
- Service Date
- Patient Lastname
- Insurance

Patient

Primary Secondary Any

Insurance

Electronic
 Non Electronic
 Custom

Apply

Facility

If the physician office is associated with more than one facility, the list populates in the dropdown

- The check boxes allow the user to select multiple options at the same time.
- This selection includes **In** and **Not in** radio buttons
- The user can check all of the items or uncheck all items by selecting either “In” or “Not in” radio buttons
- This selection the **Not in** check box, which means the work queue will contain the inverse of what is selected in the dropdown



- Click on the apply button to add the filter and remove icon to remove the filter.

Ordering Physician

- The user can type text into the filter text box to display a subset of items in the dropdown
- The user can check all of the items or uncheck all items by clicking **Add** or **Close**
- This filter includes the **Not in** check box, which means the work queue will contain the inverse of what is selected in the dropdown
- To remove all the selected physicians click on the remove all option

Insurance

- **Any Primary Insurance or Secondary Insurance** – The check boxes allows the user to select multiple options that appear on the work queue
- The radio button selection allows you to limit the Electronic/Non Electronic/Custom insurances that appear on the work queue
- Click on the apply button to add the filter and remove icon to remove the filter.

Work queue filters: Order Source

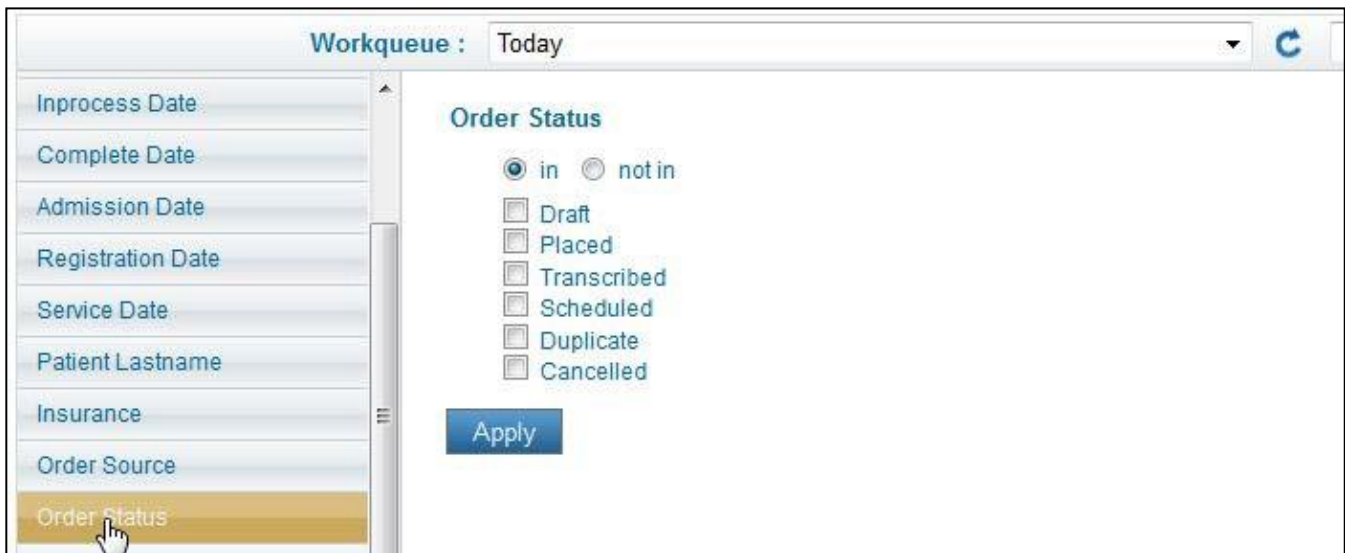


Order Source: This filter lists the following controls: electronic, fax, patient and facility

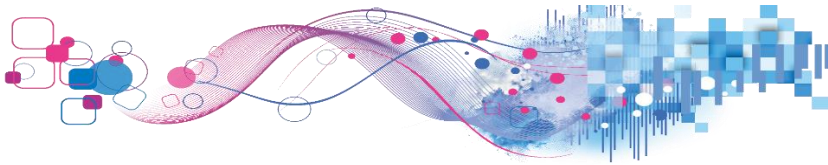
- The check boxes allow the user to select multiple options at the same time.

- This selection includes **In** and **Not in** radio buttons
- The user can check all of the items or uncheck all items by selecting either **In** or **Not in** radio buttons. The **Not in** option means the work queue will contain the inverse of what is selected in the dropdown.
- Click on the apply button to add the filter and remove icon to remove the filter.

Work queue filter: Order Status



- The check boxes allow the user to select multiple options at the same time.
- This selection includes **In** and **Not in** radio buttons
- The user can check all of the items or uncheck all items by selecting either **In** or **Not in** radio buttons
- This selection has the not in check box, which means the work queue will contain the inverse of what is selected in the dropdown.
- Click on the apply button to add the filter and remove icon to remove the filter.



Work queue filter: Account Status

- This selection control will list the following account statuses: **Scheduled, Unscheduled, In process Scheduled, In process Unscheduled, and Completed**
- The check boxes allows the user to select multiple options at the same time
- This selection includes **In** and **Not in** radio buttons
- The User can check all of the items or uncheck all items by selecting either **In** or **Not in** radio buttons. The **Not in** option means the Work queue will contain the inverse of what is selected in the dropdown.
- Click on the **Apply** button to add the filter and remove icon to remove the filter.

Work queue filter: Alerts

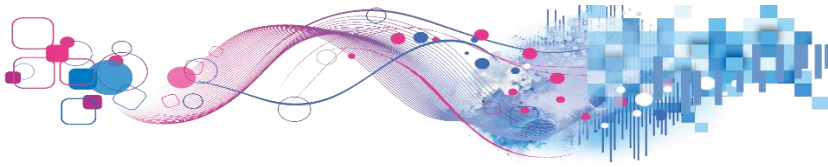
The screenshot shows a web-based interface for filtering workqueue items. At the top, it says 'Workqueue : Today'. On the left, there is a vertical list of filter categories: Inprocess Date, Complete Date, Admission Date, Registration Date, Service Date, Patient Lastname, Insurance, Order Source, Order Status, Account Status, and Order Alerts. The 'Order Alerts' item is highlighted in yellow and has a mouse cursor pointing to it. On the right side of the interface, there is a 'New Alerts' checkbox which is currently unchecked, and a blue 'Apply' button below it.

Alerts: Alerts are communication tools between the physician office user and hospitals and its ancillary facilities. Through alerts, the physician office admin should be able to:

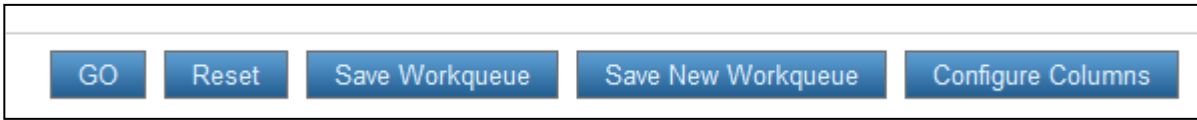
- Request and provide additional information to the facility
- Be notified of requests
- Be notified that the additional information requested has been provided and is now available
- Acknowledge the received alerts from the hospitals and its ancillary facilities
- Exchange order specific notes between physician/offices and facilities

Create Alerts filter

- Select the check box to add filter or not
- Select apply to add the filter
- Select remove icon to remove the filter






Alert actions

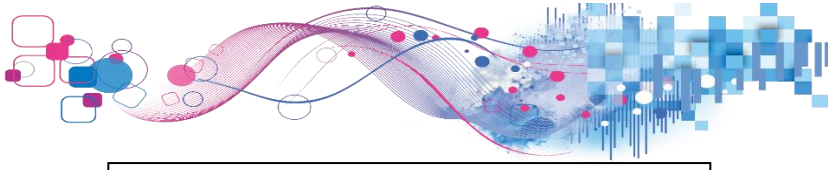


- Go: Select the search criteria and click on the **Go** button to retrieve results
- Reset: Select to reset the current search criteria
- Save Work queue: Select when modifications were made to an existing work queue
- Save New Work queue: Select to save a new work queue

Column configuration



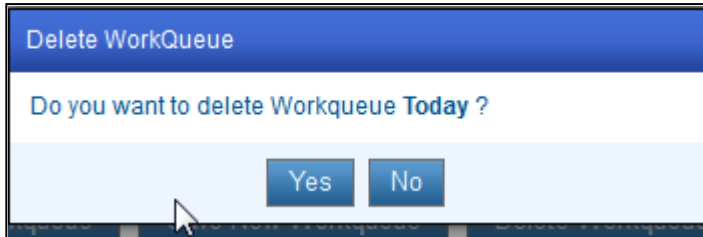
- Select configure column from the work queue search criteria
- The work queue management page displays
- To add columns to the work queue select the required column names and click  on arrow and select save
- To remove columns from the list select the required columns names and click on  arrow and select save
-  By selecting these arrows the user can arrange the work queue columns



Sort Columns : Primary Secondary

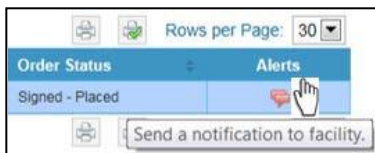
- Select the primary and secondary sort columns from the drop down

Delete Work queue



- Select the work queue from the dropdown
- Select the configure column button
- Select delete on the work queue management page
- An alert shows up to confirm deletion
 - Select yes to delete the worksheet or no to cancel the process

Alerts: View, acknowledge and send alerts



Order Alerts

Aby, Will (36Y, M) Date of Birth : 02/16/1978

Send a message to facility

Send Alert Close

New (1) All (1)

test message
Sent by abcadmin at 04/18/2014 14:03:43 IST

New (1) All (1)

test message
Sent by abcadmin at 04/18/2014 14:03:43 IST
Click to Acknowledge

- Select the alert count located on the home page
- The page navigates to the work queue where the user can view the order details
- Select the alert icon to view, acknowledge the alert or send a new alert
- Select “send a message to facility” enter the alert message and select send alert
- Select the **All** tab to view the alerts
- Select the **New** tab to acknowledge an alert
- Once the alert is acknowledged the row colour of the order changes and upon refresh the order is removed from the work queue
- The count of the alert icon changes upon page refresh

Signature pending orders

Orders that require a physician’s signature are located under the **Signature Pending** work flow actions and alerts. The physician office admin can view the order by clicking on the order.



1 Signature Pending order found.

Patient	Order Date/Time	Diagnosis	Procedures	Order Status	Action
FRANCO, Demo L (39Y, F)	06/17/2013 09:51	789.01 ABDOM PAIN R UPPER QUAD	71020 XR CHEST 2 VIEW	Unsigned - Draft	Sign Selected



View signature pending orders

- Select the signature pending link on the menu bar
- View the order by selecting the row
- The order details cannot be modified
- Mark the order as duplicate
- Recreate the order
- Delete the order
- View and acknowledge
- View order history

Draft orders



View draft orders

- Select the draft orders link on the menu bar
- View the order by clicking on the row
- Order details can be modified.
- The order can be sent to physician or to the facility
- Delete the order
- View and acknowledge

1 Draft order found.					
Patient	Order Date/Time	Diagnosis	Procedures	Order Status	Action
Test_Patient (V_F)	03/19/2014 07:20	V20.1 CARE OF HEALTHY CHILD	74160 CT ABDOMEN W	Draft	 