PASSPORT

OrderSmart

Physician Office Admin guide

- Will cover Worksheets and Office Setup - for Physician Office Admin users

April 21, 2014

OrderSmart

OrderSmart is the part of **Experian Health eCare NEXT®** Orders Suite. OrderSmart is an easy-to use web based application which helps the physician office users to send and receive electronic orders, directly to hospitals and ancillary facilities, clinics and labs. Hospitals and clinics use OrderSmart to connect to other health care operations to track the entire patient orders and categorize them on the basis of priority, order status and schedule details. Through OrderSmart the communication is secured between the physician office and facility in a much easy yet effective fashion with the help of alerts that display critical information and patient guidelines through attachments

As an office of Experian Health eCare NEXT®, prior to the order schedules, orders will be processed for insurance eligibility, Address verification, Authorization verification and Medical necessity check, the patient's propensity-to-pay, and the estimate of payment. The order workflow is run in a structured format, ensuring that no information is lost and the appointments are scheduled efficiently.

OrderSmart helps the users to:

- Schedule order for new patient or an existing patient.

- View and manage Patient schedules on the basis of priority, Order Status and schedule details.

- Provide patients payment estimates before the order is scheduled.

- Manage patient details and issues in a timely fashion without calling the hospitals for scheduling details.

- Allow physician offices to schedule orders, and send the orders to hospitals and other health care facilities electronically.

- Integrate with Experian Health eCare NEXT®, for address verification, insurance eligibility, precertification, authorization, medical necessity, determining payment estimation, and the patient's propensity to pay.

- Maintain two way communications between clinics, hospitals and ancillary facilities.

- Automatically routes orders and displays critical EMR data at the point of ordering.

- Displays alerts critical information and patient specific guidelines.

- Identifies and collects appropriate financial papers such as waiver forms, History and Physical Examination.

- Electronically creates and identifies preauthorization and referral fax forms.

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LOGIN TO ORDERSMART

Open your Internet browser and enter the following URL

https://ordersmart.passporthealth.com

Alternatively, a desktop shortcut or application link in your favorites or Intranet page may already have been made available for you to click.

The following page will open:
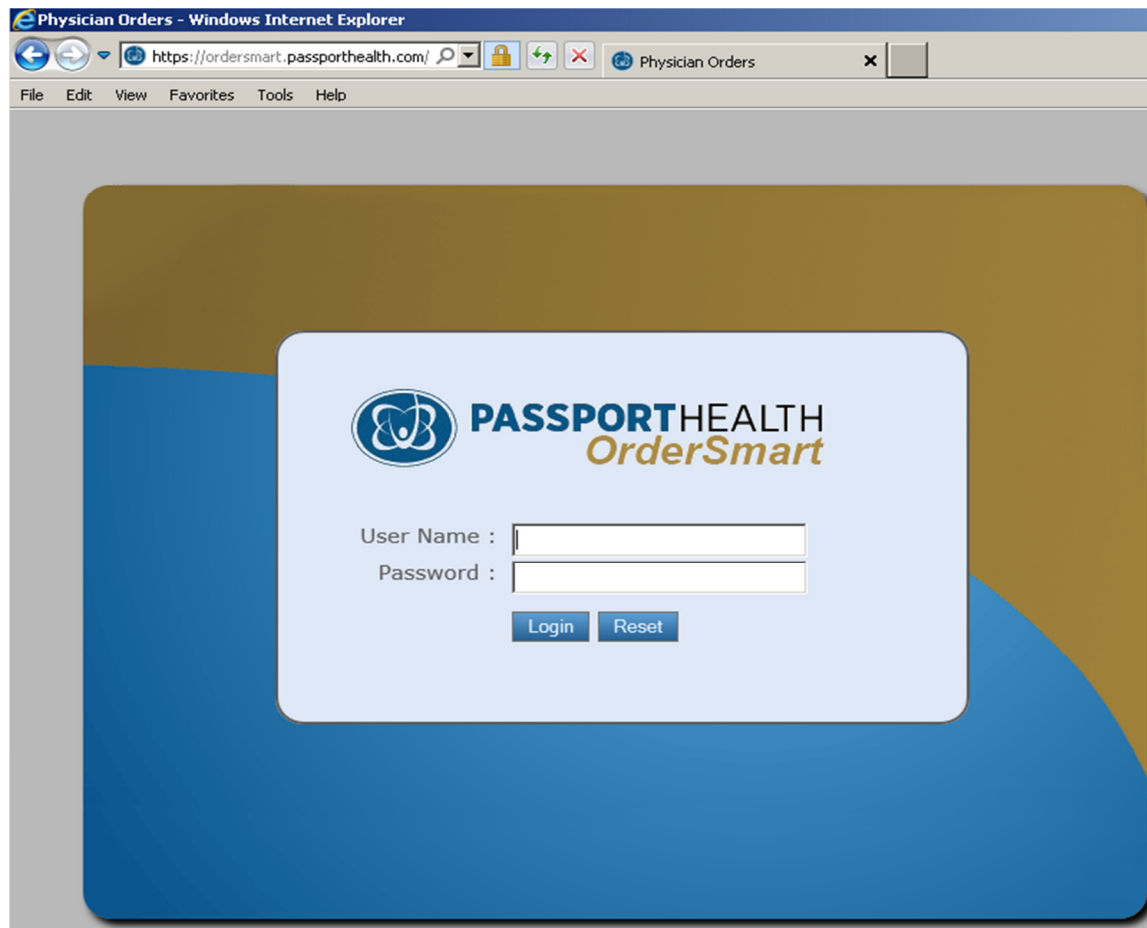
Enter your User Name and Password in the text boxes provided and then click the **<Login>** button. If this is your first time logging into OrderSmart, you will be prompted to reset your password as shown below.

Enter your current password and then select a new password and enter it into the New Password and Retype New Password text boxes and then click the **<Submit>** button.

You will then be taken back to the initial login window to re-enter your User Name and new password as shown below.

Enter your User Name again followed by your new password and then click the **<Login>** button.

* NOTE: PATIENT DATA USED THROUGH OUT THIS PRESENTATION IS NOT REAL DATA. ALSO, THE IMAGES IN THE PRESENATION MAY LOOK SLIGHTLY DIFFERENT BECAUSE OF THE INCREASED ZOOM.

The presentation details about

1. **Worksheets**

Please note: *Creating worksheets is not mandatory as the user can search and locate either the diagnosis codes and procedure codes through auto suggest.*

Worksheet is a popup designed to help the users to organize procedure codes and diagnosis based on the ordering physician under one roof.

- Worksheets help the users to locate codes in much more easy fashion.
- The users can create tabs on the basis of specialties and categorize codes under the relevant tab.
- The user can mark the frequently used codes as favorites for easy identification.
- Only authorized users can create worksheets.

1.1 Worksheets Creation: How to create worksheets, Recreate Worksheets, and Delete Worksheets

Physician Office Admin:

1. Physician office admin can create worksheet at office level.
2. Physician office admin can copy and create new worksheets for physician/physician office using facility level worksheet
3. Depending on the ordering physician selectes, particular physician / physician office and facility level worksheets are available for procedure selection in place order screen.
4. Default worksheet: The selection is based on default worksheet configuration for the ordering physician and if nothing is configured as default worksheet at physician office level 1st worksheet in the list will show up in the worksheet.
5. Physician office users can edit worksheets of physician/ physician office level only.

2. Office Setup

The office setup constitutes of the Physician and office users who are associated with the office.

- From the office setup page the user can verify the details about the office.
- View and edit the details of the office, Physicians and staff.
- Only authorized users can edit the details about the office, Physician and the staff.

2.1 Edit: How to edit physician Office details, Physician Details and Staff Details.
2.2 Add Staff: How to add staff
2.3 Create User login: How to create User login for Physicians

3. Users

The physician office constitutes of 3 users

i.   Physician:
- Order cannot be created without the Ordering physician name on it
- This user has the authority to sign the orders.
- The user can also create worksheets.
- The user can provide signing authority to the physician office admin.

ii.   Physician Office Admin
- If the physician gives the signing authority, the user can attach the physician signature to the file.
- The user can perform all the actions from Adding a patient to Worksheet creation and Office setup
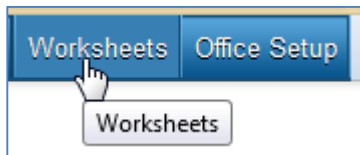
iii.   Physician Office Operator
- The user can perform all the actions from Adding a patient to Worksheet creation
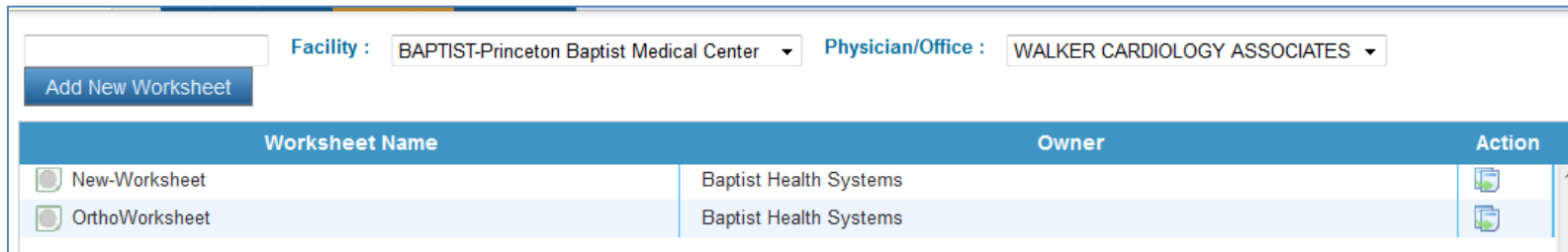- The user can only view the details of the office setup.

1. WORKSHEETS

1.1 Worksheets Tab:

Please Note: Only Authorized users can create/recreate and edit/ delete worksheets.

- **Click on Worksheets Tab**

- **Worksheets Page**

The Worksheet page lists the following

    A. Facility group: Displays the facility group under which the user is creating the worksheet

    B. List of all the worksheets under the facility {Facility worksheets, Physician office worksheets Physician worksheets}.

    C. Option to add new worksheet by selecting the facility and Physician/Physician Office

    D. Action: Copy and Recreate Worksheet.

1.2 Worksheets Creation:

Steps to create worksheet

- i.   Provide worksheet name.
- ii. Select the appropriate facility from the dropdown
- iii. Select the physician office/physician from the dropdown.
- iv. Click on Add New Worksheet.
- v.   The page navigates to Worksheet page where the user can add/edit the worksheet.

1.3 Adding Diagnosis Codes

Steps to add Diagnosis Codes:

i. In the worksheet page click on the **diagnosis tab.**
ii. Provide the **tab name** next to favorites tab.
iii. Click on the **"+"** to add the code
iv. **Search** the diagnosis code by icd code or description. From the auto suggest, select the icd code.
v. Provide the **description** for the icd code under **local description**.
vi. To mark the icd code as **favorite** click on the **star icon** next to the icd code- description
vii. Click on the **"+"** to add one more row.
viii. Click on the **"x"** to delete the row.
ix. To view the **favorites** click on the **"Favorites"** tab
x. To **save** the click on the save button on the top right of the page.
xi. To **delete** the worksheet click on the Delete button

1.4 Adding Procedure Codes

Steps to add Procedure Codes :

i. In the worksheet page click on the **procedure tab.**

ii. Provide the **tab name** next to favorites tab.

iii. Click on the **"+"** to add the code

iv. **Search** the procedure code by cpt code or description. From the auto suggest, select the cpt code and the facility service codes gets updated automatically.

v. Provide the **description** for the cpt code under **local description and Additional service codes**

vi. To mark the icd code as **favorite** click on the **star icon** next to the icd code- description

vii. Click on the **"+"** to add one more row.

viii. Click on the **"x"** to delete the row.

ix. To view the **favorites** click on the **"Favorites"** tab

x. To **save** the click on the save button on the top right of the page

xi. To **delete** the worksheet click on the Delete button

xii. **Click on "Back to list" to go back to the worksheets page.**

1.5 Copy and Recreate Worksheet
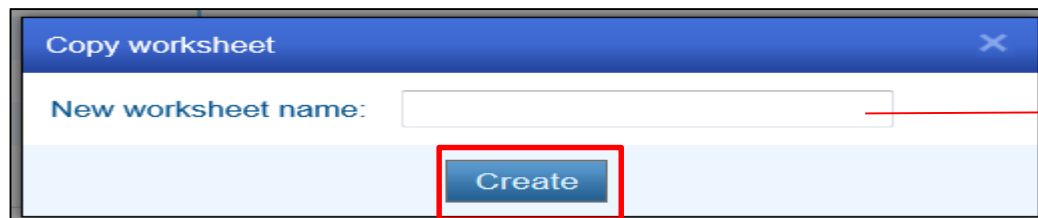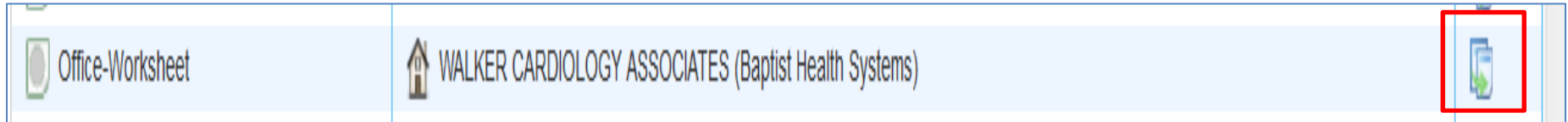
Steps to copy and create new worksheet

    i.   In the worksheets page, click on the copy and create new worksheet button under actions column.

    ii.   Provide the name of the worksheet in the "Copy worksheet" pop up.

    iii.   Click on the "Create" button.

    iv.   The page navigates to the worksheet page.

    v.   The user can perform the following actions with the copied worksheet

        - Add new diagnosis codes and procedure codes
        - Edit the local description for diagnosis codes and procedure codes and Additional service codes.
        - Mark diagnosis codes and procedure codes as favorites.
        - Can save the changes made to the worksheet.

Can delete either diagnosis codes or the procedure codes or the entire worksheet

1.6 Delete Worksheet

| Office-Worksheet | 🏠 WALKER CARDIOLOGY ASSOCIATES (Baptist Health Systems) | |
| OrthoWorksheet | Baptist Health Systems | |

Would like to delete the worksheet permanently?
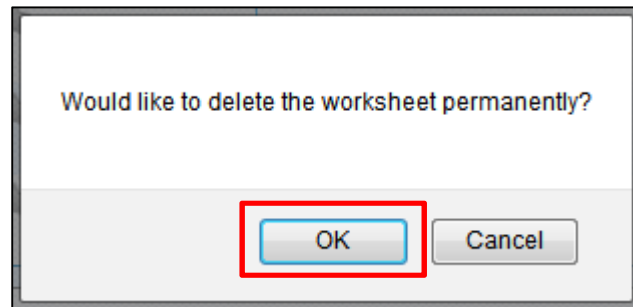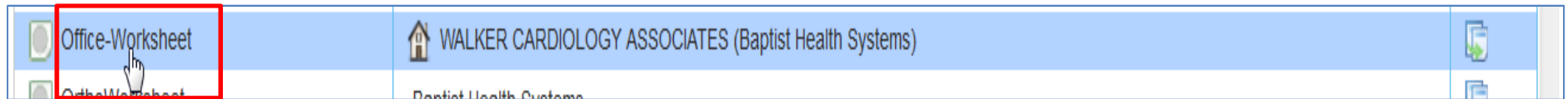
[OK]   [Cancel]

Steps to Delete Worksheet

i.   In the worksheet page, row click on the worksheet.
ii.   Click on the delete button.
iii. A pop up shows up for confirmation- "Would like to delete the worksheet permanently" click on "OK" to delete the worksheet and "CANCEL" to cancel the process.

2.1 Office Setup Tab:

2.2 Physician Office Details Page:

Physician Office : WALKER CARDIOLOG

Address : 3400 HWY 78 EAST MEDICAL ARTS TOWER SUITE 215, JASPER, AL 35501

Contact : 2052219494

Fax : 2052219004

Email :

Worksheet :

Associated Physicians

Name	NPI	Address	Phone	Worksheet	Login Name
CHERIAN, JOHN K	1164699435	JASPER, AL	2052219494		
KIM, RICHARD	1538124722	JASPER, AL	2562219494		

Staff

Add New Staff

Name	Address	Phone	User Role	Login Name
Walker Cardiology, Admin	,		PhysicianOfficeAdmin	wc-admin

Actions that can be carried out from the physician office details page:

i. **Edit Physician office details.**
ii. **Edit associated physician details.**

iii. **Add new staff.**

iv. **Edit staff details**.

2.2 Edit Physician Office details

Steps to edit physician office details:

i. Click on the "Edit" tool tip.

ii. Physician office details: Update necessary information.

iii. Worksheet: The user can browse and select office worksheet.

iv.   Submit: After necessary changes are made, click on the submit button to save the changes.

2.3 Edit Physician Details

Associated Physicians					
Name	**NPI**	**Address**	**Phone**	**Worksheet**	**Login Name**
CHERIAN, JOHN K	1164699435	JASPER, AL	2052219494		
KIM, RICHARD	1538124722	JASPER, AL	2562219494		

Physician Offices : WALKER CARDIOLOGY ASSOCIATES

Update Physician Details

* Last Name : CHERIAN	* First Name : JOHN	Middle Name : K
* NPI : 1164699435		Physician Tax Id :

Contact Information

Street : 3400 Highway 78 East   Other :

City : JASPER   State : Alabama   Zip : 35501 -

Work Phone : (205)221-9494   Cell Phone :

Fax : (205)221-9006   Email :

Create User Login

Signature : [   ] Browse...

Submit   Back

Steps to Edit Physician Details:

i.   **Office Association page: Row c**lick on the physician details. The page navigates to "Update Physician Details" page.
ii.   **Update Physician Details page:** Edit the necessary details and click on the submit button.
iii.   **Signature: Can browse and upload physician signature. Must be in JPG format**
iv.   **Upon submit, "Physician details updated" message shows up. And the page redirects to office association page.**

2.4 Create User login for the physician:

Steps to create user login for the physician:

i.   In the **update physician details page** click on the "Create User Login" link.

ii.   **Create User login for the 'XXX':** Provide User name, Password, Retype password and click on the submit button.

iii.   **Edit:** To edit the physician details, click on the edit button in the physician details panel.

iv.   **The page navigates to update physician details page, update necessary information and click on the submit button.**

2.5 Add New Staff:

Staff				Add New Staff
Name	**Address**	**Phone**	**User Role**	**Login Name**
Walker Cardiology, Admin	,		PhysicianOfficeAdmin	wc-admin

Physician Office : WALKER CARDIOLOGY ASSOCIATES

Add & Associate Staff

* **Last Name :** [   ]   * **First Name :** [   ]   **Middle Name :** [   ]

Contact Information

Street : [   ]   **Other :** [   ]

City : [   ]   **State :** [   ]   **Zip :** [   ] - [   ]

Work Phone : [   ]   **Cell Phone :** [   ]

Physician Office : WALKER CARDIOLOGY ASSOCIATES

Add & Associate Staff

* **Last Name :** wc   * **First Name :** office admin-1   **Middle Name :** [   ]

Contact Information

Street : New street   **Other :** Other

City : City   **State :** Massachusetts   **Zip :** 12345 - 1234

Work Phone : (111)111-1111   **Cell Phone :** (222)222-2222

Fax : (333)333-3333   **Email :** test@testmail.com

Submit   Back

Staff added.

Create user login for wc, office admin-1

Name : wc, office admin-1
Address : New street, Other, City, MA 12345-1234 **Contact :** 1111111111 **Fax :** 3333333333
Email : test@testmail.com

* User Name : wc-officeadmin-1

* User Role : Select ▾
- Select
- Physician Office Operator
- Physician Office Admin

* Password :

* Retype Password :

[Submit] [Back]

* User Name : `wc-officeadmin-1`

* User Role : Physician Office Admin ▼

* Password : ●●●●●●●●●●

* Retype Password : ●●●●●●●●●●|

Submit   Back

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* User N[ame] : [wc-officea]dmin-1

Saving ...

* User[Role:] [Physician] Office Admin ▼

* Password : ●●●●●●●●●●

* Retype Password : ●●●●●●●●●●

Submit   Back

Saving ...

Update Staff Details

| * Last Name : | wc | * First Name : | office admin-1 | Middle Name : | |

Contact Information

Street : New street   Other : Other

City : City   State : Massachusetts   Zip : 12345 - 1234

Work Phone : (111)111-1111   Cell Phone : (222)222-2222

Fax : (333)333-3333   Email : test@testmail.com

User Name: wc-officeadmin-1   Change Password

Submit   Back

Steps to Add New Staff:

i. **From Office Association page:** Click on **Add new staff button.**
ii. **Add & Associate Staff:** Provide the mandatory fields like First name, Last name. The user can also include the staff address details.
iii. **Submit :** Click on the submit button and "Staff Added" message shows up and the page navigates to "Create User login page"
iv. **Create User Login page :** The user should provide "User Name", "User Role", "Password", " Password Reset Interval" and "Password Reset Flag" and click on the submit button.
v. **Upon submit the page redirects to Add & Associate Staff page.**
vi. **Password link in Add & Associate Staff page** : If the user wishes to change the staff password, click on the password link and the page navigates to "create user login" page.

2.6 Edit Staff Details

Staff				Add New Staff
Name	Address	Phone	User Role	Login Name
Walker Cardiology, Admin	,		PhysicianOfficeAdmin	wc-admin

Steps to Edit Staff Details:

i. **Office Association page: Row c**lick on the staff details. The page navigates to "Update Staff Details" page.
ii. **Update Staff Details page:** Edit the necessary details and click on the submit button.
iii. **Upon submit, "Staff details updated" message shows up. And the page redirects to office association page.**

3. PHYSICIAN CONFIGURATION

If the Physician is using the system for the first time, the physician needs to accept terms of the Esignature and periodically revalidate them. Without accepting the terms the physician cannot login into the system

3.1 Physician Initial Login

Please reset your password.

* Password : _____

* New Password : _____

* Retype New Password : _____

☐ I agree that I am responsible for maintaining the confidentiality of the Usernames and Passwords assigned to me and my office staff. I accept full responsibility for any use or actions taken with my username(s) and password(s) and recognize that the codes will constitute my electronic signature and be used to approve orders for patients.

☐ By application of my electronic signature, I certify that I am ordering tests for the patient, including all individual components in any profile, which I have determined are medically necessary.

☐ By selecting "Approval All" or "Approve Selected", I approve the application of my electronic signature for each order for the patients listed, and certify that I am ordering the tests for such patients, including all individual components in any profile, which I have determined are medically necessary.

☐ I agree to delegate to my office staff the authority to place, modify and electronically sign orders on my behalf for my patients. I accept full responsibility for any use or actions taken with my username(s) and password(s) and recognize that the codes will constitute my electronic signature and be used to approve orders for patients.

Submit   Reset

Steps to follow

i. The physician needs to provide the Passwords and accept the first 3 conditions.
ii. If the physician doesn't accept any of the first 3 conditions an alert shows up "Please read and accept the terms for approval."
iii. The last term is optional.
iv. If the physician accepts the last term, it implies that the physician is delegating his staff to place, modify and electronically sign the orders.
v. If the physician doesn't accept the delegation at the initial login, he can verify the term later from his profile page.