MANAGING FUTURE FLAGS, FUTURE IMAGING/RADIOLOGY/REFERRAL ORDERS, AND CURRENT INR ORDERS DURING PRELOAD & GO LIVE PERIODS

I. OVERVIEW

Immediately prior to go- live date, practice managers will receive 3 excel reports:

1. Excel file of their future dated flags.
2. Excel file of all active INR ordered in preceding 12 months.
3. Excel file of patients with future dated referrals, imaging, & procedure orders

   These excel files are sortable by multiple fields, including dates, provider, test type, practice etc. see below

O+A1:K4RG	HOME LOC	PATIENT NAME	MRN	CATNAME	ORD DESCRIPTION
BHMH	BHFM	smith, jones	A000000799835	Labs	Magnesium Level
BHMH	BHFM	smith, jane	B000000064449	Labs	Thyrotropin (TSH)
BHMH	BHFM	doe, john	C000001089649	Labs	Thyrotropin (TSH)

ORDER TYPE	CODE	ORDERDATE	REFERRED TO	ORDERING PROVIDER
Test	CPT-83735	09/26/2018	(BHMH) BLUE HILL MEMORIAL HOSPITAL - LAB	Billings-Lindsey DO, Lisa M
Test	CPT-84443	09/26/2018	(BHMH) BLUE HILL MEMORIAL HOSPITAL - LAB	Carter FNP, Jacqueline L
Test	CPT-84443	09/26/2018	(BHMH) BLUE HILL MEMORIAL HOSPITAL - LAB	Lesko MD, Lisa

II. IMPORTANT LAB REMINDERS

- No re-entry of lab orders *except INRs* (due to the risk and volume associated with these patients/tests) is recommended.
- All existing lab orders placed in legacy EHR are active for one year from their start date, and available as needed by consulting the archive or legacy system. They do not need to be re-entered into Cerner.
- During the preload period, no real time documentation is to take place.
- *Some organizations currently track order completion of **all** active orders.*
  - *These organizations may choose to use the excel files to manage any/all outstanding orders based on their existing protocols, but this is not a uniform expectation.*
  - *A file showing ALL OPEN ORDERS (not just future-dated) can be requested from Kelly York.*

III.   ENTERING FUTURE FLAGS/REMINDERS FROM CENTRICITY TO POWERCHART

During preload:
- Preloader reviews any current flags.
- Address all flags as clinically appropriate.
- See specific workflow below.

At/after go-live:
- Review the excel list for all future dated flags.
- Note that flags (this includes pop ups, and care alerts) can still be viewed in the read-only view of Centricity.

WORKFLOW
1. Using the flag/pop up/care alert excel report form, you will enter future reminders on your patient in Cerner where clinically needed.
2. You will be entering this information in Cerner on the latest FIN/encounter for your patient.
3. From Ambulatory View, select reminders

Click on the Plus (+) Sign in the reminders component
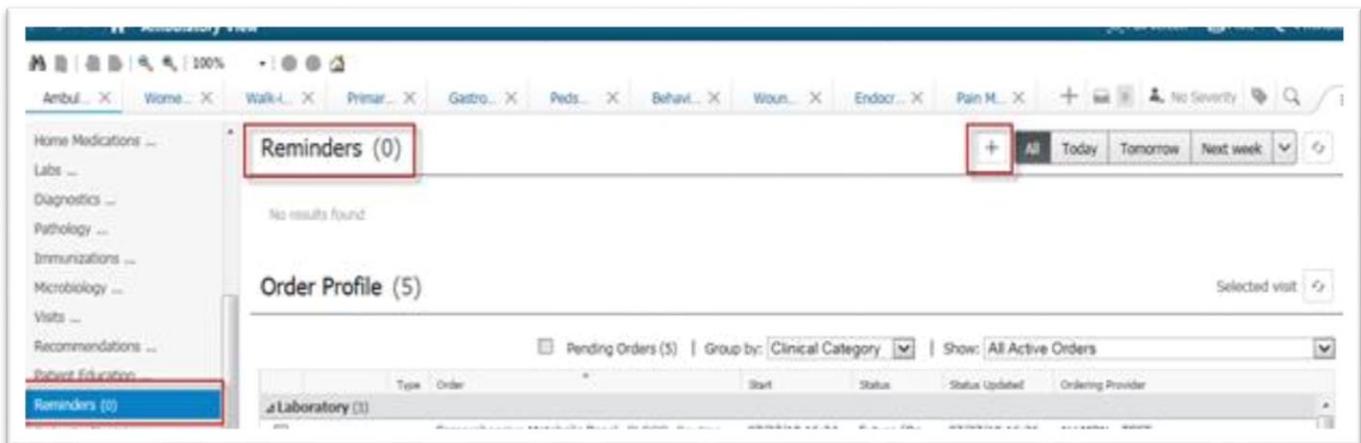
The recommendation would be to send this to the appropriate pool for your practice.

Staff cannot see your inbox – to reduce risk of missing something for the patient, the use of pools is highly recommended.

In the "To" field, click on the binoculars.

From the binoculars, an address book opens, select pool and search.

For example, select Blue Hill Specialty Services – General Surgery Combined Clinical

Highlight the name of the pool, click Add and the name of the pool will be added to the send to field and click OK

In the message field, type Needs scheduled for 3-month follow-up CT scan of lung

In the lower right-hand corner, you will enter when you want this to show up and when it is due. For training purposes, we will enter show up in 1 minute, due on 12/15/2018 and Send
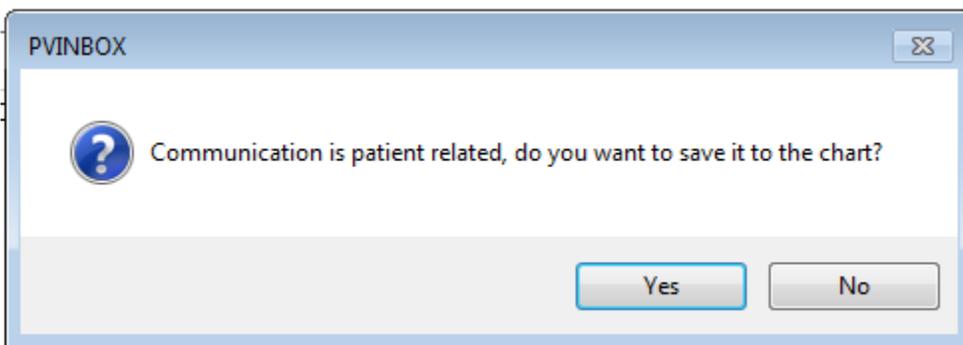
If this is something you do not want saved to the patient chart, you can uncheck the box that states save to chart.
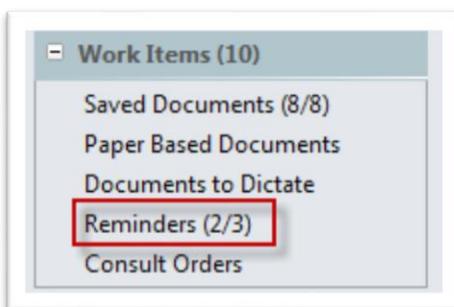
You will get a pop up asking if you want to save to chart, state no

Refresh the component in the patient chart and you will see it appear.

The reminder will also be in the message center, click on the home icon from the toolbar.

In the Work Items section of the message center, messages will appear for ones sent to you. The pool tab will show reminders as well.

When you have completed the task associated with the reminder, you will select complete.

You will double click to open the message. If you are unable to complete it for whatever reason, it can be rescheduled or redirected.

IV.   ENTERING CURRENT INR ORDERS INTO CERNER

Overview:
- Immediately prior to go- live date, practice managers will receive an excel file of all active INR orders placed in the past year.
- Managers should designate clinical staff to load INR orders manually into Cerner (using an "in between encounter" and JPP order, see workflow below).

Important lab reminders:
- No re-entry of lab orders *except INRs* (due to the risk and volume associated with these patients/tests) is recommended.
- All existing lab orders placed in legacy EHR are active for one year from their start date, and available and as needed by consulting the archive or legacy system. They do not need to be re-entered into Cerner.
- During the preload period, no real time documentation is to take place.
- *Some organizations currently track order completion of all active orders. These organizations may choose to use the excel files to manage any/all outstanding orders based on their existing protocols, but this is not a uniform expectation. A file showing ALL OPEN ORDERS (not just future dated) can be requested form Kelly York.*
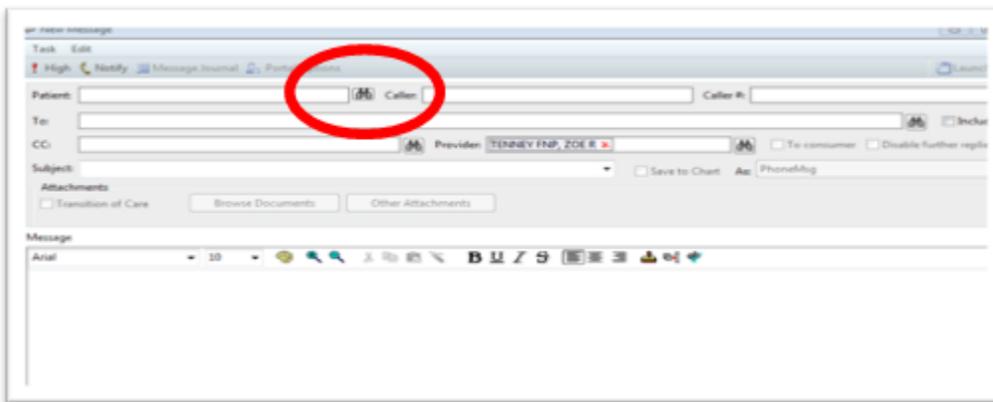
WORKFLOW: CREATING AN "IN BETWEEN ENCOUNTER" & PLACING CURRENT INR ORDERS FROM CENTRICITY INTO CERNER

Consult the INR excel file for a list of patient names.

1. From your Home message center (*not* from the pt's chart)
- Select the "Communicate" Button from the toolbar
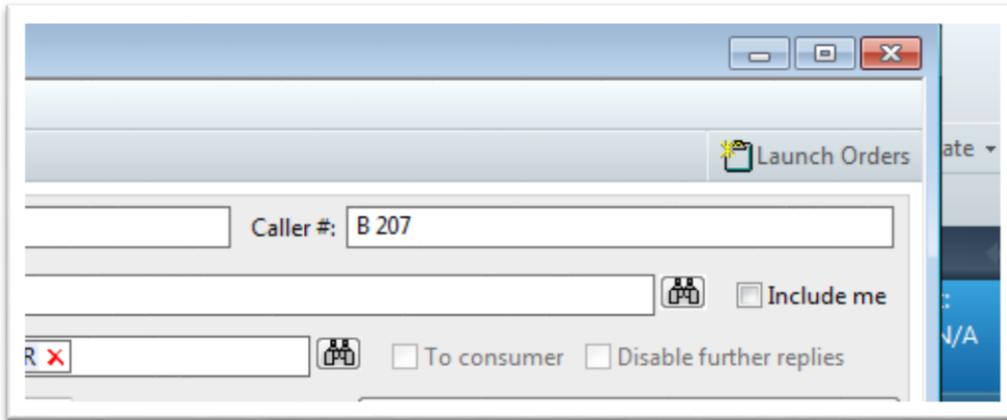- Select "Message" from the dropdown

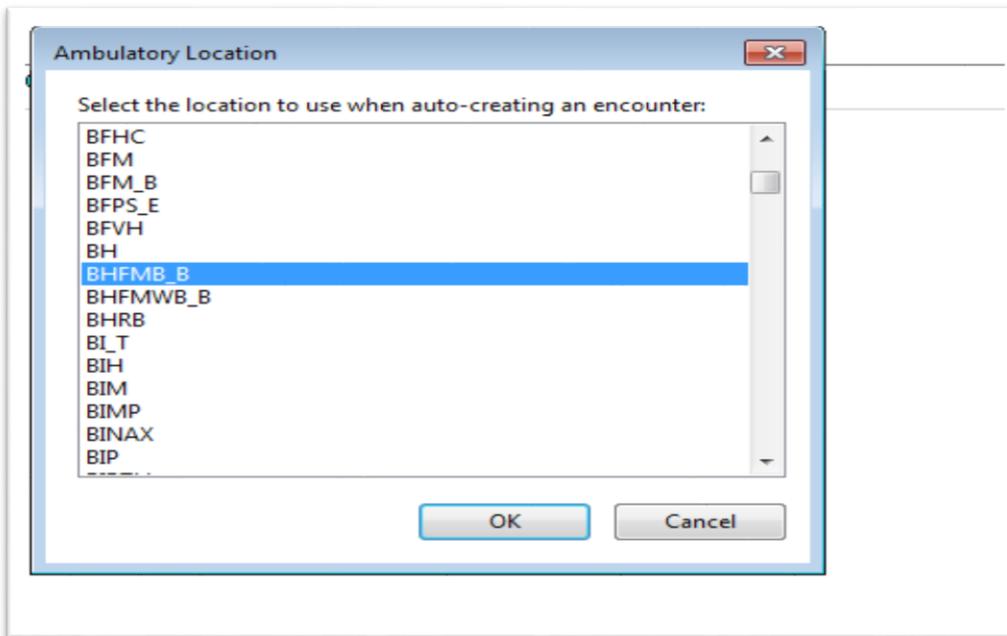2. Search for your patient by using the binoculars

3. When patient comes up, click on the patient name in the top box, then click OK, *without selecting an encounter in the bottom part of the screen. This is because we are creating an "in between encounter"*
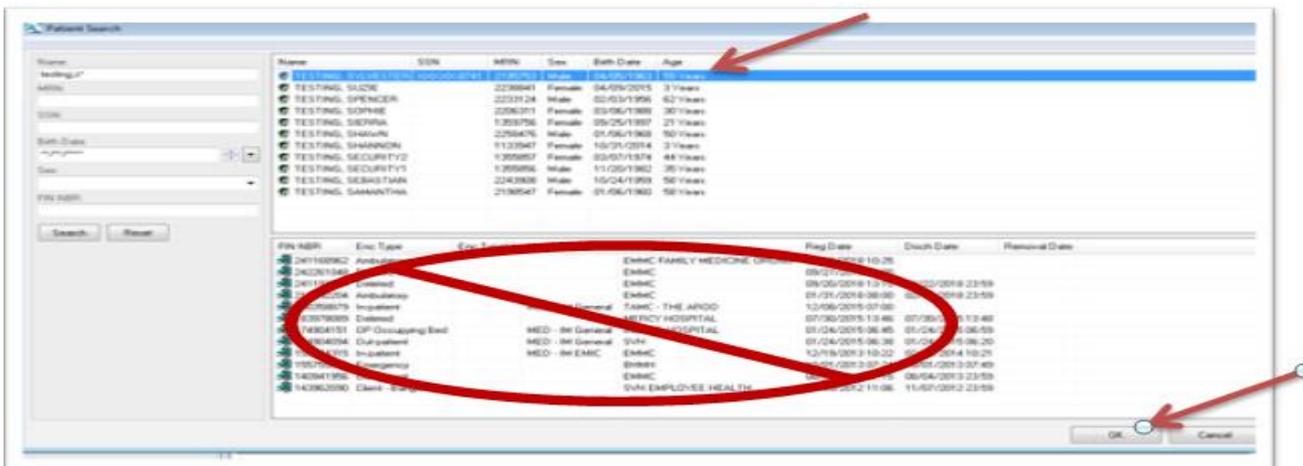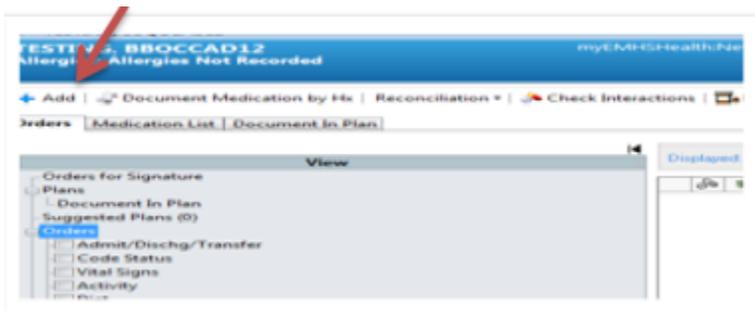

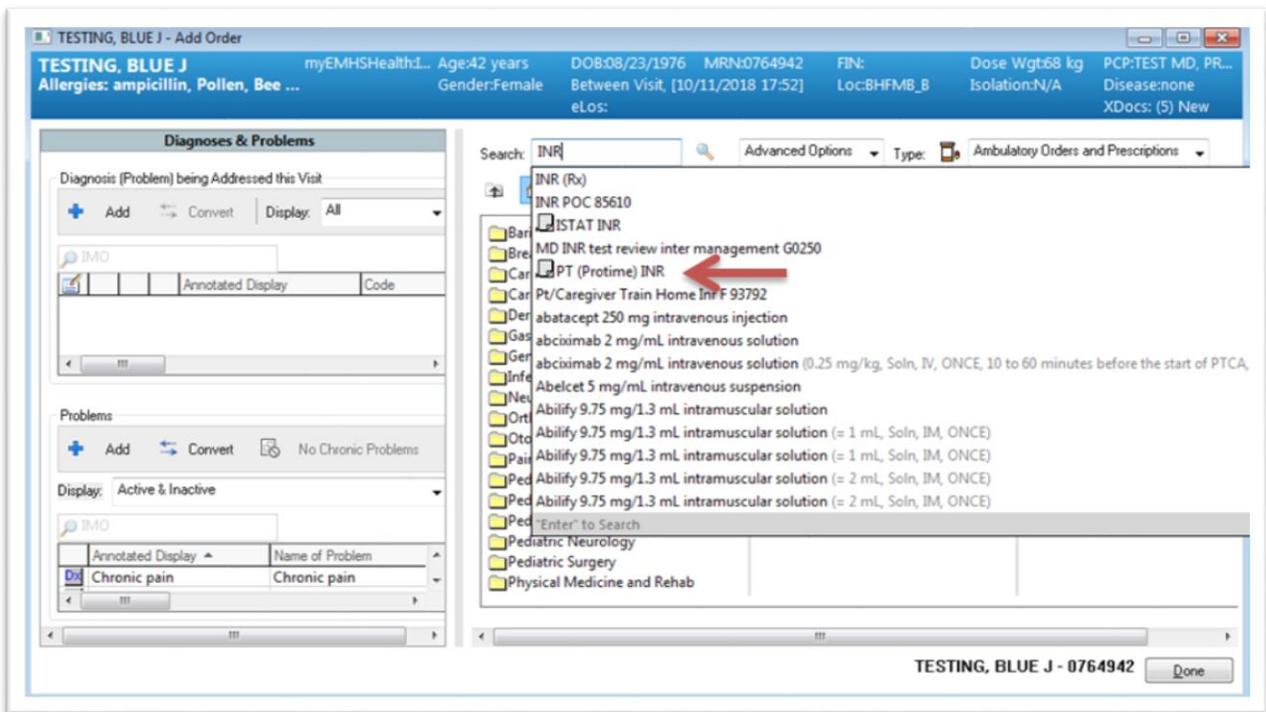4. Select "Launch Orders" from the upper right-hand corner

5. Select your location from the list that pops up

6. Next select the "plus sign" to "Add" (left upper corner)

7. Type "INR" into search box, then select "PT (Protime) INR" and click "done"

- ****Note that for offices that perform point-of-care (POC) INRs during patient encounters, *these orders can be done at the time of the patient's visit.*
  i. In that scenario, the INR POC is selected from quick orders during patient rooming
  ii. It will generate a task on the patient, and prompt result entry as well
  iii. It will be associated with the FIN of the patient's encounter that day
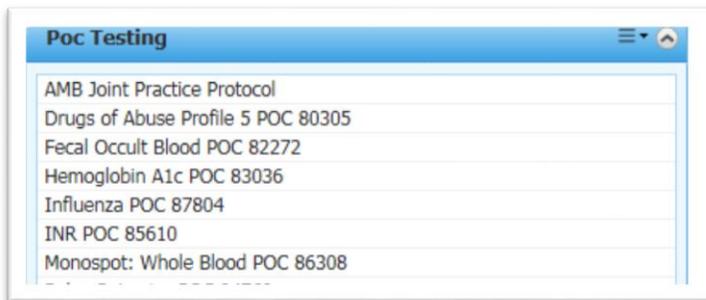
8. The order box will appear, select as an **Order** (not proposal)
   ✓ Communication type will be "Joint Practice Protocol"
   ✓ Indicate name of ordering provider (based on original Centricity order)
   ✓ This order entry this does not require PCP cosign: *it is an existing live order in centricity and has already been signed there. You are just transcribing it into the new system.*

9. In "Details" tab

   ✓ Specimen type is "blood"
   ✓ Leave the "order for future visit" button as "yes"
   ✓ Change the "Start Date/Time" to be the date of the original order in Centricity
   ✓ Add a "special instructions" note: "standing INR order x 1 year"

10. Under "Diagnoses" tab, select (or "+ Add" if needed) an appropriate diagnosis from their list.

11. Select "sign" in right lower corner

12. The "message" form will appear again
    a. In the subject type "INR order"
    b. There should not be a recipient, as this order entry this does not require PCP cosign: *it is an existing live order in centricity and has already been signed there. You are just transcribing it into the new system.*
    c. Select the box for "save to chart"
    d. Click "send" in right lower corner.
    e. It will now be in the chart, but not on anyone's message center.

V.   <u>**Management of Future-Dated Referrals, Imaging, and Procedures**</u>

Review the "future order" excel file, which contains future dated imaging, procedure, and referral orders.

Managers and referrals experts will need track these patients manually (on Excel) until all have been scheduled and visits completed.

<u>Three months after go-live</u>:
- Practice manager/referrals specialists in sending offices should review list for any outstanding tests/referrals still being manually tracked and re-enter Cerner individually at that time.

<u>Reminder:</u>
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