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

I. <u>OVERVIEW</u>

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

| 0+A1:K4RG | HOME LOC | PATIENT NAME | MRN | CATNAME | ORD DESCRIPTION |
|-----------|-------------|--------------|---------------|---------|-------------------|
| BHMH | BHFM | smith, jones | A000000799835 | Labs | Magnesium Level |
| BHMH | BHFM | smith, jane | B00000064449 | 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

| -1004 | | | | | | | |
|----------------------|---|--|--|--|------------------|---|---|
| Walk-L. X Primar. X | Gattro. X | Peds X Behavi | LX Wan_X | Endocr X | Pain MX | + = = 4. | is Severity 🗣 🔾 |
| Reminders (0) | | | | | + 43 | Today Tomorrow | Next week |
| No results found | | | | | | | |
| Order Profile (5 |) | | | | | | Selected visit |
| | | Pending Orders (5) | Group by: Clinical Ca | tegory M | Show: All Active | e Orders | |
| Te | e Order | | Bart | Satus | Status Updated | Ordering Provider | |
| all the sectors (11) | | | | | | | |
| | I Image: A second se | Code Code Code Code Code Code Code | Code Code | Contemporate | | Code Profile (5) Pending Orders (5) Group by: Clinical Category M Show: All Active Tope Order | Contemporation Contempo |

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.

| Task Ec | dit | | | |
|------------|----------------------------|--------------------|------------------------|----------------------------|
| High | 🕻 Notify 📓 Message Journal | | | |
| Patient: [| TESTING, CARSON | Show in: Recipient | 's Inbox 🔹 | |
| То: [| 1 | | | 🕅 🕅 Include m |
| cc: [| | Provider: | M | |
| Subject: | Reminders | | Save to Chart As: Care | Management Secondary Revie |
| Attachn | ments | | | |
| Bro | owse Documents Other | Attachments | | |

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

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

| | Blue Hill Specialty Services - General Surgery Clerical - Back |
|---|--|
| | Blue Hill Specialty Services - General Surgery Clerical - Front |
| | Blue Hill Specialty Services - General Surgery Combined Clerical |
| 1 | Blue Hill Specialty Services - General Surgery Combined Clinical |
| | Blue Hill Specialty Services - General Surgery MA Clinical Staff |
| | Blue Hill Specialty Services - General Surgery RN Clinical Staff |

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

| Send to | |
|--|---------------------------|
| Name | |
| Blue Hill Specialty Services - General | Surgery Combined Clinical |

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

| Arial | ▼ 12 | • | - | € |
|-------------|-------------------|-------|------|---|
| Needs sched | uled for follow-u | p lun | g CT | • |

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

| Show up: | 1 Minutes | ▼ 08/05/2018 🚔 🔻 | 0820 |
|----------|------------|------------------|--------|
| Due on: | 19 Week(s) | ▼ 12/15/2018 🗬 ▼ | 0804 |
| | | Sand | Cancel |

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

| PVINBOX | 8 |
|---------|--|
| ? | Communication is patient related, do you want to save it to the chart? |
| | Yes 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.

| Work Items (10) | |
|-----------------------|--|
| Saved Documents (8/8) | |
| Paper Based Documents | |
| Documents to Dictate | |
| Reminders (2/3) | |
| Consult Orders | |

| Communicate | • 💕 Open 🛱 | Reply Reply Al | Redirect | Reschedule 🖌 Cor | mplete 📓 Mess | age Journal 📴 | Select Patient 🚟 Sele | ct All |
|-------------|---------------|----------------|---------------|------------------|---------------|-----------------|-------------------------|---------------|
| Priority | Patient Name | From | To | Create Da 🗸 | Subject | Status | Show Up Date | Due Date |
| | TESTING, CAR_ | ZZ, AMB MA C_ | ZZ, AMB MA C | 08/05/2018 0 | Reminders | Pending | 08/05/2018 0_ | 12/15/2018 0. |
| | TESTING, IT2 | ZZ, AMB MA C_ | ZZ . AMB MA C | 07/30/2018 1 | Reminders | Pending | 07/30/2018 1_ | 08/13/2018 1. |
| | TESTING, AMB | ZZ, AMB MA C | ZZ, AMB MA C | 07/24/2018 06:4 | Reminders | Opened | 07/24/2018 06:4 | |

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.

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

| ask Edit View Patient Chart Links Notifications Navigation | |
|--|---|
| 🔄 Home 🎬 Provider Handoff 🖃 Message Center 🎬 Dynamic Worklist | : 🔄 Schedule 🎍 Patient List 🌇 Multi-Patient Task List 🐃 Teach Me 🐘 MyExperience. Perioperative Tracking 😂 Staff Assignment 🐘 Set and Mr |
| 💐 Health InfoNet Portal 🔍 Prescription Monitoring Program 🔍 UpToD | ate 🚍 Patient Location Inquiry 🚍 Explorer Menu 🛱 Schedule 🔃 Clinical Links 🔃 Pysis ES Nurse Link 🔍 Mediquant 🍈 Schedule Appt 🗰 🔒 F |
| 群 Surpend 剥 Exit 🚡 Calculator 🧌 AdHoc 🔥 Patient Pharmacy 発 ら Sign: 0 Mag: 1 Online: 8 ; | Change 🔟 Patient Education 🎟 Medication Administration 🛫 View Sticky Notes 📆 New Sticky Note 🌋 PM Conversation + 🔩 Communicate + |
| Home | |
| Inbox Proves Pools | A B A A IN A A 100% · O A A |
| Indox Items (7) | Day View Calendar Open Items (0) Upcoming |

2. Search for your patient by using the binoculars

| Task Edit | | | | | - |
|---------------------------|--|---------------|----------|-------------|-----------------------|
| Piligh C Netify 31 Messay | a Journal 🔝 Portugations | | | | Claund |
| Patient: | Caller | G | eller #t | | |
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| Aradian of Care | Browse Documents Other Attachments | 9 🗐 포 3 🌢 여 🕈 | | | |

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"

| | Name | 50N M | N See | Bath-Da | te | | | | |
|--|---|-------------------|----------------------------------|--|---|--|--|---|--|
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| | 1420411/50 Card - 50 | | | 1.15 | See Free-Crister | HEALTH | 2012 11:08 | A contract of the second | |

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

| 쒭 Launch Orders | ate 🕶 |
|---|-------|
| Caller #: B 207 | |
| 🕅 🔲 Include me | : |
| R X To consumer Disable further replies | √A |

5. Select your location from the list that pops up

| BFHC BFM BFM_B | <u>^</u> |
|---|--------------|
| BFPS_E BFVH BH | |
| BHFMB_B BHFMWB_B BHRB BLT BIH BIM BIMP BIMAX | |
| BIP | ₹ Cruci |

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"

| lergies: ampicillin, Pollen, Bee | Gender:Female Between Visit, [10/11/2018 17:52] Loc:BHFMB_B Isolation:N/A Disease:none eLos: XDocs: (5) New |
|--|---|
| Diagnoses & Problems | Searchy INR Advanced Options Turner Ambulatory Orders and Prescriptions |
| Diagnosis (Problem) being Addressed this Visit | INR (Rx) |
| Add Sconvert Display: All MO Annotated Display Code | INR POC 85610 ISTAT INR Bar MD INR test review inter management 60250 Car PT (Protime) INR Car Pt/Caregiver Train Home Inr F 93792 Der abatacept 250 mg intravenous injection Gas abcimab 2 mg/mL intravenous solution Get abcimab 2 mg/mL intravenous solution |
| Problems Add Scorwert 🐼 No Chronic Problems | Abelcet 5 mg/mL intravenous suspension Ort Abilify 9.75 mg/1.3 mL intramuscular solution Otc Abilify 9.75 mg/1.3 mL intramuscular solution (= 1 mL, Soln, IM, ONCE) Pair Abilify 9.75 mg/1.3 mL intramuscular solution (= 1 mL, Soln, IM, ONCE) |
| Display: Active & Inactive | Ped Ability 9.75 mg/1.3 mL intramuscular solution (= 2 mL, Soln, IM, ONCE) Ped Ability 9.75 mg/1.3 mL intramuscular solution (= 2 mL, Soln, IM, ONCE) Ped Period South |
| Annotated Display Annotated Display Annotated Display Chronic pain Chronic pain | Pediatric Neurology Pediatric Surgery Physical Medicine and Rehab |
| ۰ | |

- ****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

| rocresting | |
|------------------------------------|--|
| AMB Joint Practice Protocol | |
| Drugs of Abuse Profile 5 POC 80305 | |
| Fecal Occult Blood POC 82272 | |
| Hemoglobin A1c POC 83036 | |
| Influenza POC 87804 | |
| INR POC 85610 | |
| Monospot: Whole Blood POC 86308 | |

- 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"

| *Specimen Type: BLOOD | ~ | *Collection Priority: | Routine | ~ | |
|-------------------------------------|----|-----------------------|-------------------------|------|-----|
| Order for Future Visit: 💽 Yes 🛐 🔿 N | ło | Start Date/Time:: | 10/11/2018 | 1757 | EDT |
| PERFORMED OUTSIDE OF EMHS: Yes No | | Label Comment: | | | |
| Read Back: | * | Special Instructions: | Standing order x 1 year | | |
| | | | | | |
| | | 0 | | | |

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

| ▼ Details fo | r PT (Protime) INR |
|--------------|--------------------------|
| Petails | Order Comments Diagnoses |
| 🕂 Add | DMI 矣 |
| | Available Diagnoses |
| 1 | 📵 🕨 A-fib (I48.91) |
| | |
| | Available Diagnoses |

- 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.

| 🖞 High 🕻 Notify 归 Messa | ge Journal (1) 🔛 Portal Options |
|---|--|
| Patient: TESTING, GRACE | Caller: TESTING, GRACE Caller #: F |
| To: | |
| CC: | Provider: |
| Subject: INR order | ▼ Save to Chart As: |
| Attachments | Browse Documents Other Attachments |
| /lessage | |
| Arial | 🔹 10 🔹 🍕 🔍 🐇 🖻 🖻 🕱 🖪 🖳 🗲 🗐 🗮 📲 🕸 🕸 |
| * Submitted: ** Order:INR POC 85610 sta Details: 08/06/2018 11:23 | nding INR order x 1 year EDT, standing INR order x 1 year, AF (atrial fibrillation) |

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.

Three months after go-live:

• 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.

Reminder:

- 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.