PSYCHĒ

Medical Laboratory Software

e.Outreach

User Guide

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CHAPTER 1
OUTREACH LOGIN PAGE

OUTREACH LOGIN PAGE

The Laboratory provides the Outreach URL, and unique user id (code)/password to each Outreach user. The URL is used to access the Outreach login page. The unique user code and password allows the user to securely log on to Outreach. The Outreach URL can be saved to either the web browser 'Favorites', a desktop shortcut, or both.

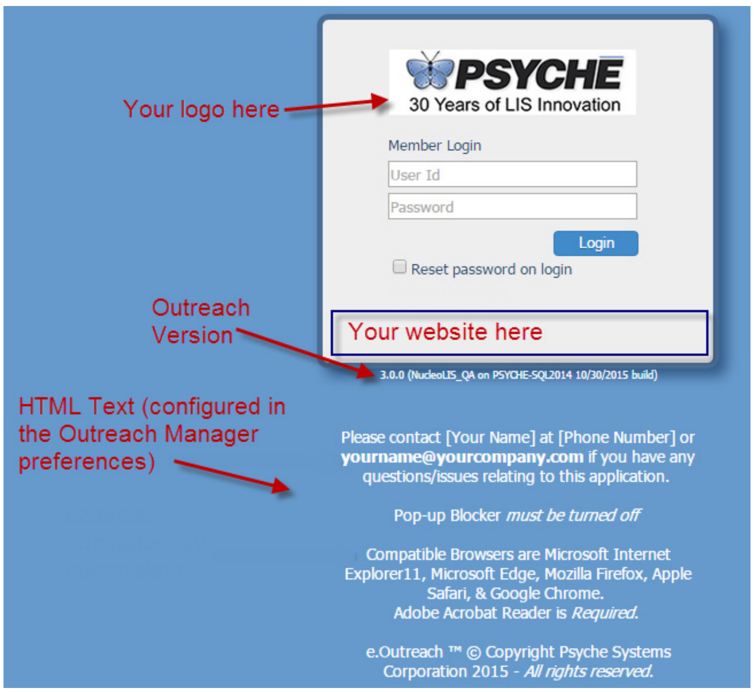


Figure 3-1: Outreach Login Page

Login Page Customizations

LOGO AND WEB SITE

Psyche Systems can customize the Outreach login page to include a logo and web site link. The Logo must be a high resolution JPG that is 778 x 245 pixels.

HIPAA STATEMENT

A HIPAA message can be configured in Outreach Manager. Please see Outreach Manager chapter for details on configuration.

DISABLED MESSAGE

This customizable message is used to provide additional instructions to a user that becomes disabled in Outreach from 3 or more consecutive incorrect login attempts.

HTML TEXT

An HTML message can be displayed on the login page to provide instructions for the users logging into Outreach. The message is configured in Outreach Manager and must be in HTML format.

PASSWORD LENGTH/SPECIAL OR ALPHANUMERIC CHARACTERS

Password settings such as password length and additional password requirements such as special or alphanumeric characters can be configured by Psyche Systems if needed.

Web Browser Compatibility

Outreach has been tested to be compatible using Internet Explorer, Mozilla FireFox, Google Chrome and Safari for Mac. Users may not be able to access Outreach using browsers other than the ones specified. Psyche Systems can not guarantee Outreach functionality if other browsers are used.

Security/Data Encryption - Hosted Clients

Psyche Systems uses Secure Sockets Layer (SSL) technology to secure and encrypt our web server. SSL is a protocol which enables applications to transmit information back and forth securely by using an encryption key (certificate) which is assigned by a Certification Authority. Applications that use the SSL protocol inherently know how to give and receive encryption keys with other applications, as well as how to encrypt and decrypt data sent between them.

Invalid/Disabled User Accounts

Outreach can only be accessed by entering a valid user code and password. An 'Invalid Login' message is displayed if the user code and/or password entered is not correct. Three consecutive login attempts with an incorrect credentials disables the user account; a message 'disabled' is displayed on the third attempt.

Once an account has been disabled, it must be reset by the laboratory Outreach System Administrator. See Outreach Manager/Human Resources for details on creating/modifying user accounts and resetting a disabled user.

DISABLED MESSAGE DISPLAYED AT LOGIN

A message can be created which can include Outreach System Manager contact information for disabled Outreach accounts. For information on creating the message, see Outreach Manager/Configuration.

Expired Accounts

If a user account becomes expired, the user will be prompted to change the assigned password before access to Outreach is granted. Setting the password to the existing password is disallowed.

Exiting Outreach

To exit Outreach, simply click the ‘logout’ button from any window.

CHAPTER 4
OUTREACH RESULTS MODULE

The Outreach Results module provides Outreach users with prompt read-only access to their completed reports from a secure web page accessed from a Web-enabled PC.

Result List Page

The Result List page is the first page displayed after logging onto Outreach.

To display a list of results, choose search criteria if desired and then click the *Run* button. The default display on the page is ascending order by patient name however any column on the page can be sorted in ascending or descending order by clicking on the column heading.

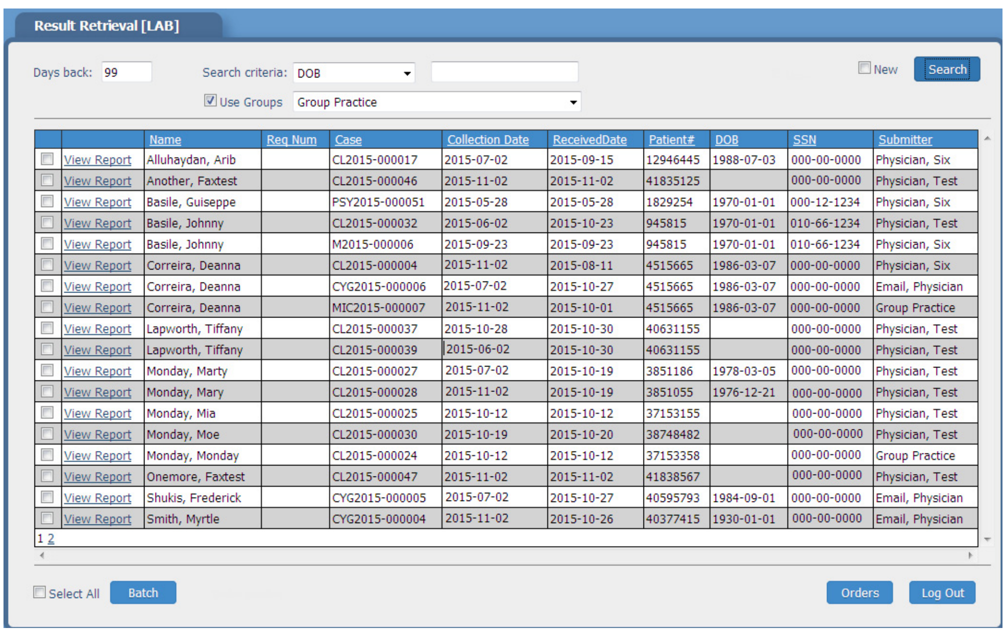


Figure 4-1: Results Page View

Days Back To Search

The default Days back to Search is a site-wide setting configured by the laboratory. It calculates the number of days back from the original report creation date. The Days Back to Search can be altered by typing the desired days back and then selecting *Run* to execute the search. The modified Days Back value will remain until the manually changes this setting different setting.

Search Criteria

To further narrow the listing of results, additional search criteria can be used. See Table 2. Searches are always performed in conjunction with the Days Back To Search.

New Check box

The results displayed on the Results page can either be new results only (results that have not been viewed by the logged user) or all available results (previously viewed and not yet viewed). This configuration is managed by the Laboratory System Manager via Outreach Manager but can be modified by the user simply by toggling the 'New' check box located in the upper right corner of the Results page.

Table 1: Result Page Field Descriptions

Column Name	Description
Name	Patient Name
Req Num	Requisition Number - Internal number assigned to an Outreach order
Case	Case Number - Internal numbering assigned to a result by OutreachPathology System Case number
Received Date	In-Lab DateAccession Date
Patient #	Medical Record number or Patient code assigned to the patient
DOB	Patient Date of Birth
SSN	Patient Social Security Number
Sign out Date	Date that the report was first generated/or signed out
Report Date	Date the report was first generated
Submitter	Submitting physician for the order

VIEWING PATIENT REPORTS

Once there are results available to view, the Outreach Results page will display the case details with a link to the PDF report. This 'View Report' link indicates that a PDF exists for the report and is viewable). This link displays the PDF report generated by the LIS. Reports are viewed using Adobe Reader and can be viewed in one of three different ways (see below).

Table 2: Report Viewing Options

View	Instructions
Single Report	Click the 'View Report' link next to the patient name to display the report in Adobe Reader.
Multiple reports on a page	Click the check boxes next to the desired reports and then select the *Batch* button to compile all reports together in Adobe Reader.

Table 2: Report Viewing Options

View	Instructions
All reports on a page	Click the *Select All* check box to select all reports on the page and then select the *Batch* button to compile all reports together in Adobe Reader.

Reports by Group

Users that are members of one or more physician group can click the 'Use Groups' check box at the bottom of the page to view the group's results.

Reports by Report Team

Report Teams allow result display for any user definable combination of physicians, locations and groups. If a user with a defined Report Team is logged into Outreach the following takes place:

- **The group drop down list is populated based on the groups defined in the team.**
- **A "My Results" check box is displayed at the bottom of the page.**
- **When the "My Results" check box is not checked, query results are based on the team definition.**
- **When the "My Results" check box is checked, query results are based on the attached physician (standard report access).**

VIEWING PATIENT HISTORY

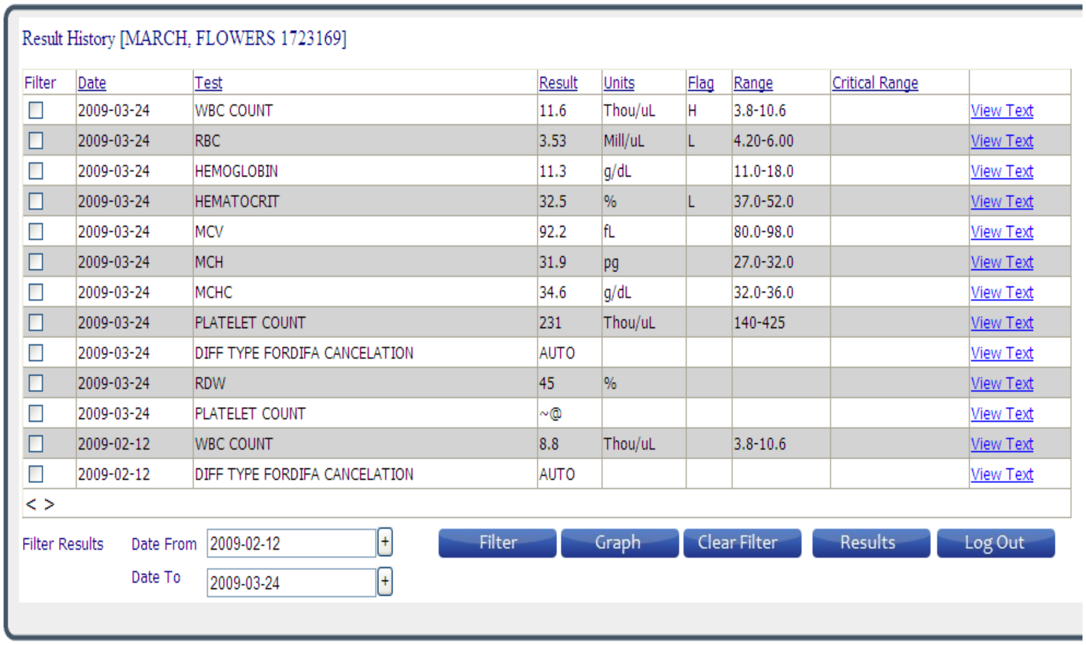
Outreach is able to display a patient's history when a patient (with the same patient number) has more than one report.

HOW TO VIEW PATIENT REPORT HISTORY

- **Click the "View Report" link in the Results window to open the Adobe Reader window and display the report. Note: if no report is viewable, contact the LIS system administrator.**
- **Historical Cases - If there are additional historical cases for the patient, a "Patient Report" drop down box is displayed in the Adobe Reader window. If there are no additional cases for this patient, then the "Patient Report" drop down listing will not be present.**
- **Additional Case Documents - If there are other case document available for a particular case, a "Reports" drop down box is displayed in the Adobe Reader window to view these documents. This drop down is not displayed if there are no additional documents to be viewed.**

HOW TO VIEW CLINICAL RESULT HISTORY

- **Clinical Result history can be viewed for clinical (quantitative) results to view trends over time**
- **From the Results page, click the History link to the left of the Patient Name.**
- **A list of the patient's tests and results is displayed (See "Clinical History Window" on page 10.)**



Result History [MARCH, FLOWERS 1723169]

Filter	Date	Test	Result	Units	Flag	Range	Critical Range	
☐	2009-03-24	WBC COUNT	11.6	Thou/uL	H	3.8-10.6		View Text
☐	2009-03-24	RBC	3.53	Mill/uL	L	4.20-6.00		View Text
☐	2009-03-24	HEMOGLOBIN	11.3	g/dL		11.0-18.0		View Text
☐	2009-03-24	HEMATOCRIT	32.5	%	L	37.0-52.0		View Text
☐	2009-03-24	MCV	92.2	fL		80.0-98.0		View Text
☐	2009-03-24	MCH	31.9	pg		27.0-32.0		View Text
☐	2009-03-24	MCHC	34.6	g/dL		32.0-36.0		View Text
☐	2009-03-24	PLATELET COUNT	231	Thou/uL		140-425		View Text
☐	2009-03-24	DIFF TYPE FORDIFA CANCELATION	AUTO					View Text
☐	2009-03-24	RDW	45	%				View Text
☐	2009-03-24	PLATELET COUNT	~@					View Text
☐	2009-02-12	WBC COUNT	8.8	Thou/uL		3.8-10.6		View Text
☐	2009-02-12	DIFF TYPE FORDIFA CANCELATION	AUTO					View Text

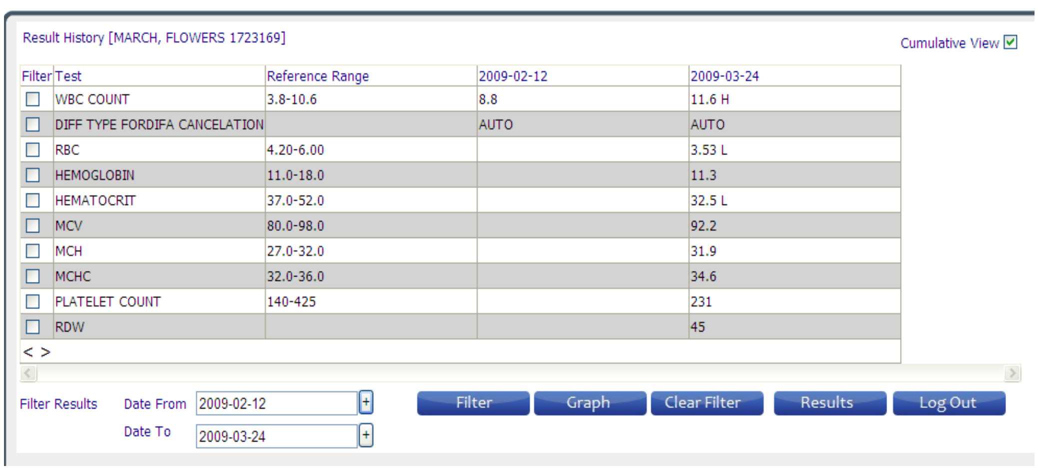
< >

Filter Results Date From 2009-02-12 Date To 2009-03-24

Filter Graph Clear Filter Results Log Out

Figure 4-2: Clinical History Window

- **Check off the Cumulative View check box on upper right, the history page display shows each test once as a row and the results for each date as columns.**



Result History [MARCH, FLOWERS 1723169]

Cumulative View ☑

Filter	Test	Reference Range	2009-02-12	2009-03-24
☐	WBC COUNT	3.8-10.6	8.8	11.6 H
☐	DIFF TYPE FORDIFA CANCELATION		AUTO	AUTO
☐	RBC	4.20-6.00		3.53 L
☐	HEMOGLOBIN	11.0-18.0		11.3
☐	HEMATOCRIT	37.0-52.0		32.5 L
☐	MCV	80.0-98.0		92.2
☐	MCH	27.0-32.0		31.9
☐	MCHC	32.0-36.0		34.6
☐	PLATELET COUNT	140-425		231
☐	RDW			45

< >

Filter Results Date From 2009-02-12 Date To 2009-03-24

Filter Graph Clear Filter Results Log Out

Filtering The Patient History

The patient history can be filtered to narrow down the list of result history displayed.

Filter By Date

Results can be filtered using a date or range of dates. To change the dates, use the calendar to choose the desired dates then select 'Filter'.

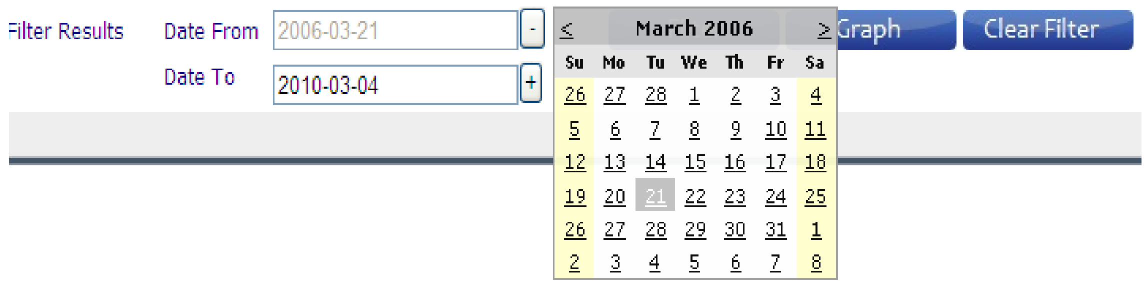


Figure 4-3: Calendar Selection

Filter By Test(s)

To filter tests, select the tests in the Filter Results portion of the Result History window. To select a single test, click on the test. To select multiple tests, hold the CTRL and select the tests. To select tests in succession, hold the SHIFT and select the tests. After selecting the test(s), click 'Filter' to filter the listing by the selected test(s). To reset the filter, select the Clear Filter button.

Graphing Clinical Test Results

How To Graph Tests

- **Select the tests to be graphed from the Result History window**
- **Select the *Graph* button to create the Graph (Figure 4-4 on Page 11).**

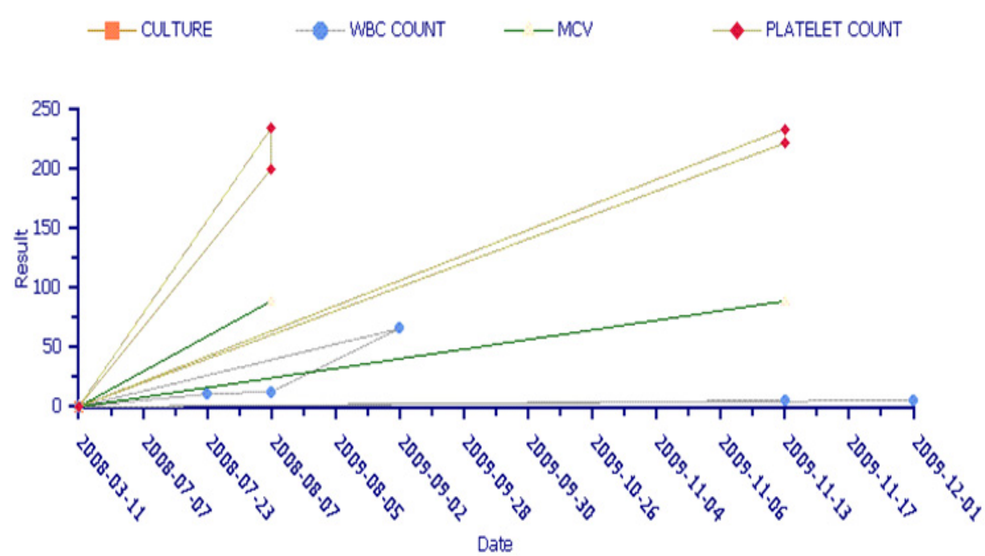


Figure 4-4: History Graph

CHAPTER 5
OUTREACH - ORDER LIST

The Outreach Order Entry module allows physicians to quickly and easily order from a secure web page using a web-enabled PC and a typical Web browser.

The Order Entry Module consists of two main pages:

1. Order List Page- displays the listing of orders placed by the logged user.
2. Order Entry Page- Used to create/modify/cancel orders. Which is discussed in the next chapter.

ORDERS WINDOW

The Order List page is blank until a search is executed. Upon search execution, the window displays the orders available for viewing by the logged user. By default, the orders displayed in this window are sorted in ascending order by order date & time.

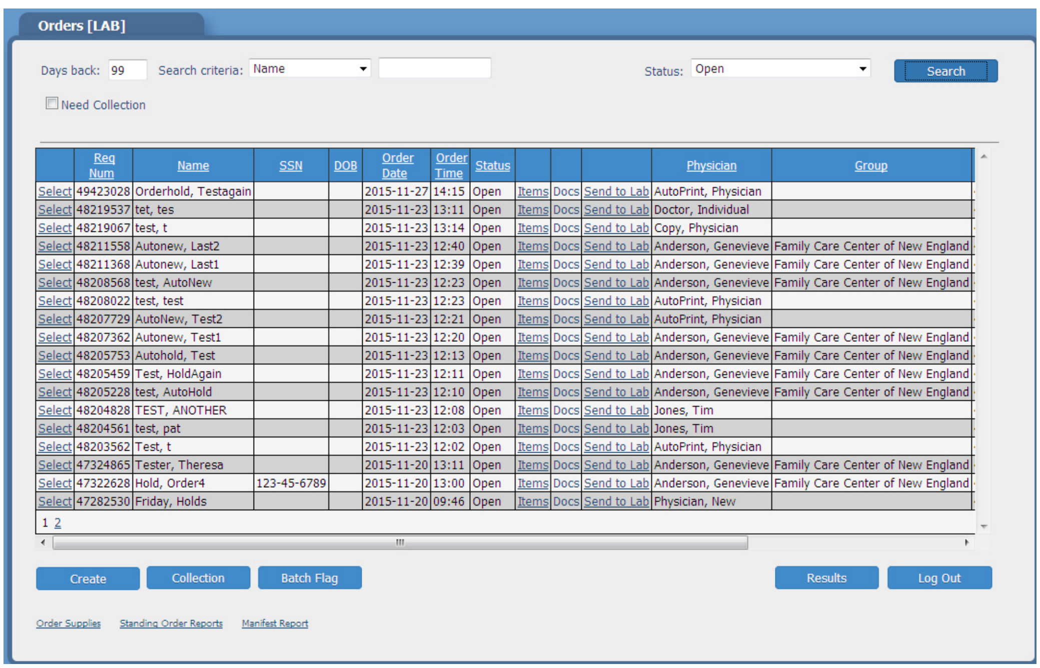


Figure 5-1: Order List

DATA SORT

Orders can be sorted by a column by clicking on the column heading. The first click will arrange the data in Ascending order (A to Z); the second click will arrange the column in Descending order (Z to A).

Table 1: User Types

Outreach User Type	Available Patients	Visible Orders	Available Submitter(s)	Linked Physician
Lab User	All	All	All	None
Physician User	Case, visit or order from linked physician	Linked physician orders only	Cant change to a different submitter	Physician record with group = False
Group User	Case, visit, or order from the group	Orders made by a group member	Can change to any group physician	Physician record with group = True

Days Back To Search

The default Days Back to Search is a site-wide setting configured in Outreach Manager by the Laboratory. This setting can be manually altered in Outreach by typing the desired days back and then selecting 'Run'. T

Search Criteria

Orders can be further narrowed by using Search Criteria. The default search criteria is 'All Fields' but the setting can be modified to display patients based on a specific demographic. The search criteria field selection is a drop down listing. The field next to the drop down is where the criteria to be searched for is entered.

Search Criteria is used in conjunction with the Days Back To Search. So for example, if the Days Back to Search was set at 7 and a Search Criteria was SSN with values of 015. Then Outreach would display the orders for the last seven days that included the value "015" in the SSN column.

To remove the search criteria, clear the search criteria that was previously entered and then select Run.

Order Status

The Orders listing can be narrowed even further by including Order Status criteria (located to the left of the Run button. The default status display is 'All' which displays all orders regardless of their status (excludes Standing Orders). To limit the listing to orders with a certain status (or to view Standing Orders), use the status drop down listing. The status of an order determines the options that the user has for making modifications to an existing order (see Table 2 "Order Status").

Table 2: Order Status

Status	Description	Order Modification Options
Open	Order has been placed and not yet received by the Laboratory.	View, Modify, Cancel
Ordered	Orders has been placed and received by the Host Facility (Foreign LIS only).	View
Standing	Standing order has been saved.	View, Modify, Cancel
Accessioned	Order that have been received by the Laboratory.	View
Canceled	Orders that have been canceled by an Outreach user.	View

Viewing Existing Orders

There are two links that can be used to view various details of an existing order (see Table 3 "Order Links").

Table 3: Order Links

Link	Function
Items	This link displays the specimens/tests on an order. No modification is permitted.
Select	This link displays order details. Depending on the order status, modifications may be permitted.

Modifications to Existing Orders

Order modifications can only be made to Orders with a status of Open or Standing. All other Status types are 'Read Only'.

If the order status permits modifications to the order, from the Order Entry window, select the Edit button in the desired section (e.g. Edit Patient; Edit Billing; Edit Order) to make edits to that portion of the order. Once all of the modifications are made, select the 'Place Order' button to save the changes to the order. A Print dialogue is displayed to allow the Requisition/Label to be reprinted with the modified information.

Note:
When changes to an existing order are saved, the requisition number will remain the same.

CHAPTER 4
OUTREACH ORDER ENTRY

The Order Entry window is used for entering new orders as well as viewing and modifying existing orders. It will display the major details of the order but if further inspection/review is needed for a section, select the section 'Edit' button.

The Order Entry window is divided into five sections of information; Order, Patient, Billing, Specimens/Tests, and Action Buttons.

> *Note:*
> *The fields displayed/required in each section are dependent on the configuration by the laboratory.*

To access the data entry fields for a section, select the 'Edit' button for that section.

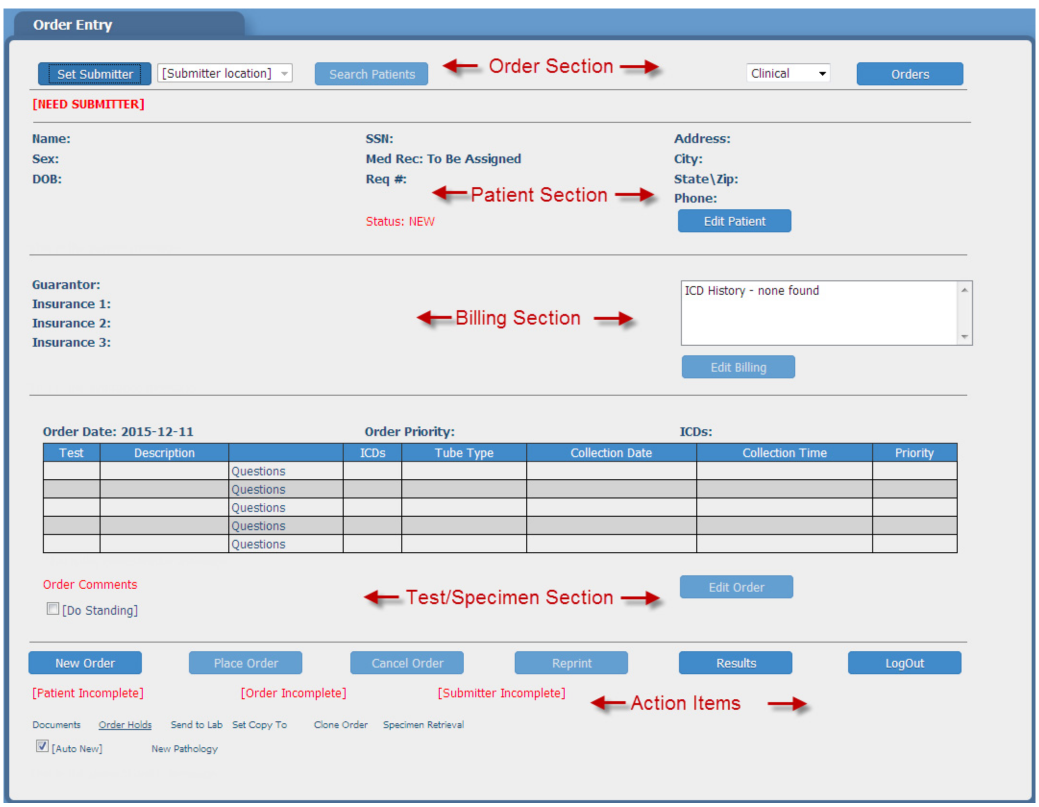


Figure 4-1: Clinical Order Entry Window

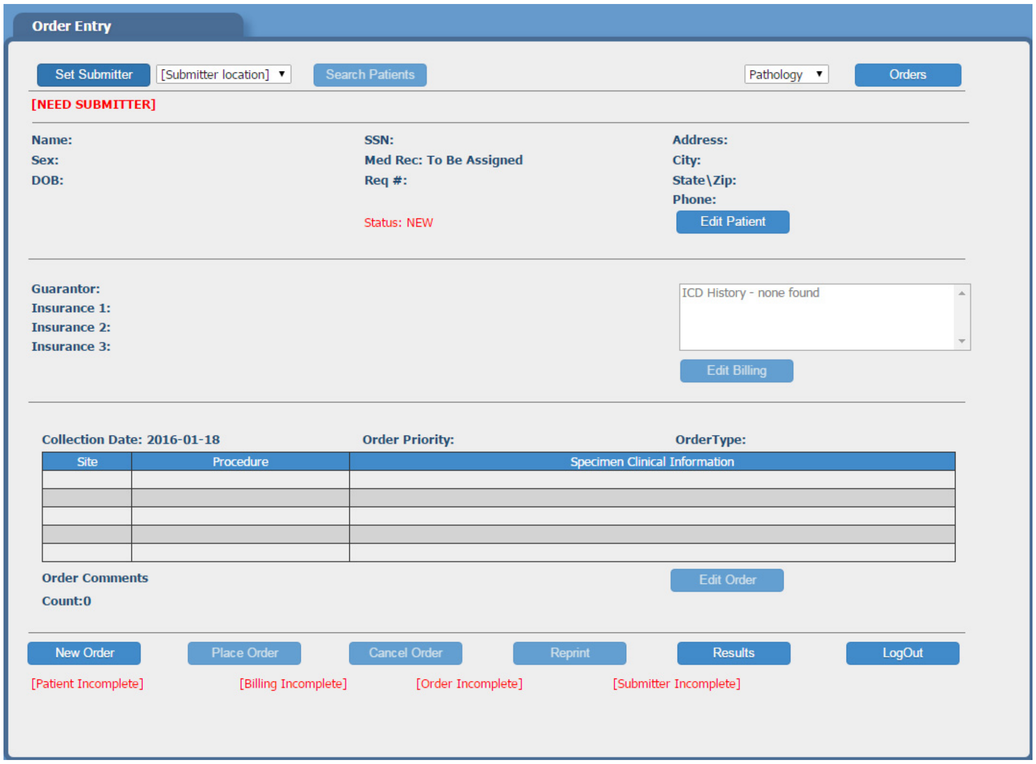


Figure 4-2: Pathology Order Entry Window

ORDER ENTRY WINDOW

Order Information

SUBMITTER/LOCATION

The behavior of the submitter and location is dependent on setup of the logged user. If the wrong submitters and/or locations are visible, please check the setup in Outreach Manager.

SEARCH PATIENTS

If the order is for a patient that has been seen previously by the submitter, search for the patient record by clicking the 'Search Patients' button.

ORDER MODE

Depending on the e.lixa module(s) purchased, a user may have the ability to place either pathology or clinical orders. When a mode is selected, the Order portion of the window will populate with data fields for the selected order type. If the Mode field is dithered, the user is not able to change the mode.

VIEW ORDERS

To return to the Orders List click the 'View Orders' button.

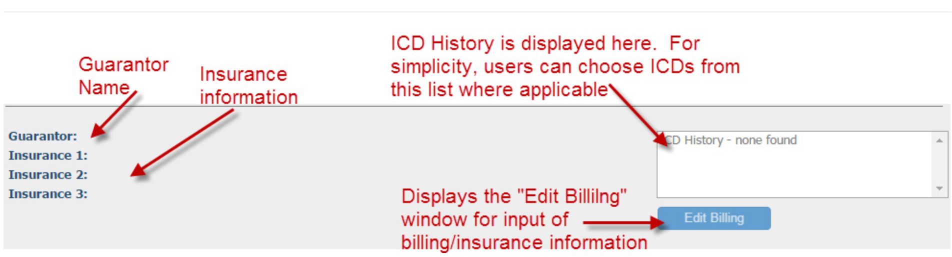
Caution
When selecting the 'View Orders' button, any order information that has not been 'placed', will be discarded.

Patient Information

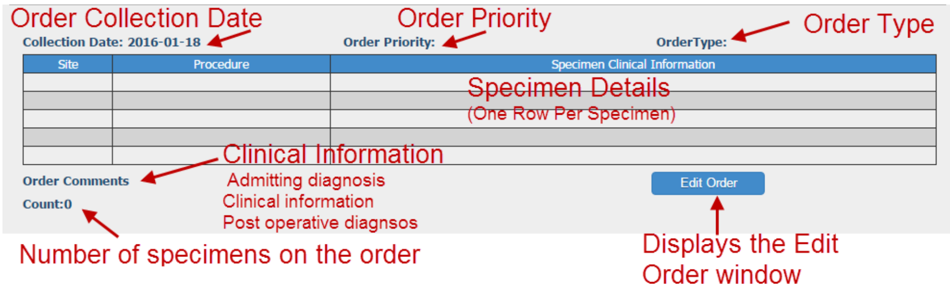
There are standard fields that are displayed in patient information section of the Order Entry window. To see the full details of the patient information, click the Edit Patient button.

Billing Information

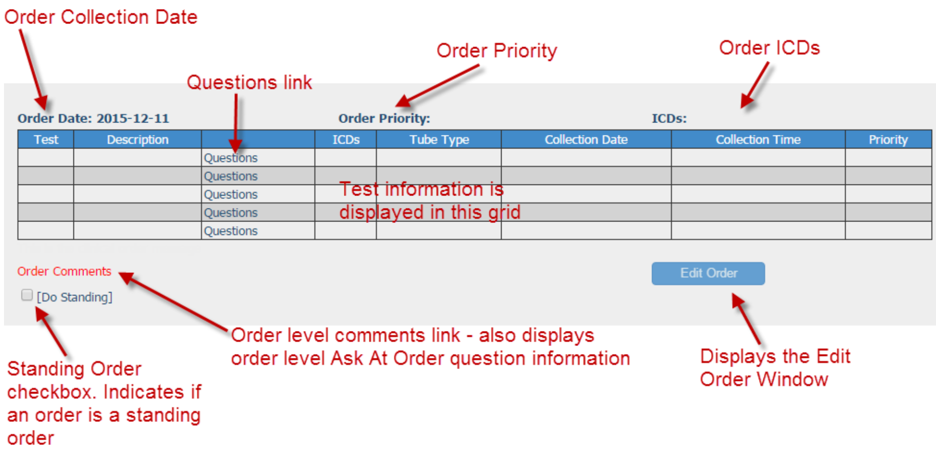
There are standard fields that are displayed in patient information section of the Order Entry window. To see the full details of the patient information, click the Edit Patient button.



Specimen Information - Pathology



Test Information - Clinical



<u>QUESTIONS LINK</u>

The Questions link will be dithered if no Ask At Order responses have been entered for a profile/test. If Ask At Order Questions have been answered, then the link will be enabled in this window allowing the user to view the questions and answers (read only).

<u>ICDS</u>

The selected ICD codes are displayed here.

<u>TUBE TYPE</u>

Identifies the collection vial that is defined used for the selected test. If no vial type has been defined for the specimen, then this field remains blank.

<u>COLLECTION DATE/TIME</u>

Lists the collection date/time for each specimen (if no specific specimen collection time is entered, this defaults to the order date/time). Note: Future or invalid dates are prohibited.

<u>PRIORITY</u>

Specifies the priority selected for the Order. This can also be set individually at the test level by clicking the Edit link next to a selected test.

<u>ORDER COMMENTS</u>

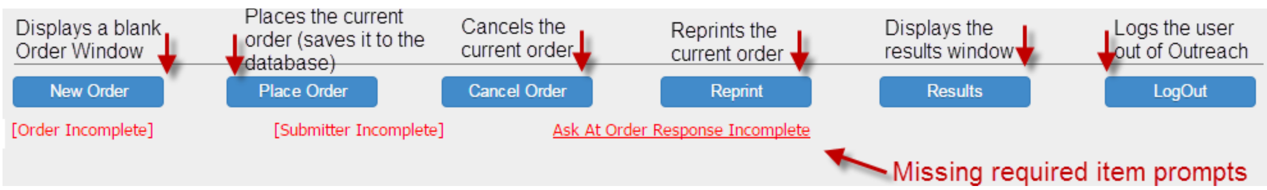
This link displays the order comments that were entered in the Edit Order window.

Do Standing Checkbox

To create a Standing Order, check the 'Do Standing' check box. When the check box is checked, the 'Place Order' button changes to 'Place As Standing'. This identifies an order that recurs at certain pre-defined intervals in the future. Continue to enter all of the required order details. When the order entry is complete, select 'Place As Standing'. A message is then displayed 'Order Saved'.

Note:
When entering a Standing Order, Ask At Order questions, Requisition and Label printing will be suppressed until a Standing Order Based Order is placed.

Action Buttons



New Order

The New Order button to displays the Order Entry window so a new Order can be entered.

Caution
When selecting the 'New Order' button, any order information that has not been saved, will be discarded.

Place Order

The Place Order button saves the entries to the database and prompts for Requisition/Label printing. This button remains dithered until all required Order Entry information has been completed. Important, unsaved changes that exist when the place order button is selected are AUTOMATICALLY saved to the order.

Cancel Order

This button is used to change the status of an Open or Standing order to Canceled. Orders that have been received by the lab are read only and can't be canceled. Contact the laboratory if a received order needs to be canceled. The user is required to enter a reason for cancellation for canceled orders.

Reprint

Prints the displayed (previously placed) order.

Important: If an order is reprinted with unsaved changes, the changes will be AUTOMATICALLY saved to the order.

Results

Displays the Results Retrieval window.

LOG OUT

Closes the Outreach application and places the user at the Outreach Login window.

Note:
Please exit Outreach using the 'Logout' button.
Exiting using the X in the upper right corner may not properly close the application.

An omission of one or more required fields will result in the display of a red "incomplete" indicator displayed at the bottom of the Order Entry window. This indicates what must be entered before the selections can be added to the current order. Required fields must be populated before the user can place an Outreach order.

ENTERING ORDERS

Edit Patient Window

The fields that are visible/required for data entry are configurable by the laboratory system manager. Additionally, if the zip code library is populated in Outreach Manager, then users only need to type a zip code to populate the city and state automatically. Note: the city and state will be displayed once the user clicks the OK button in this window.

Information that is entered in this window remains with the patient record for use on subsequent orders.

To modify the patient information, select the 'Edit Patient' button. Fields displayed/required are dependent on the configuration by the laboratory and may differ from the ones displayed below.

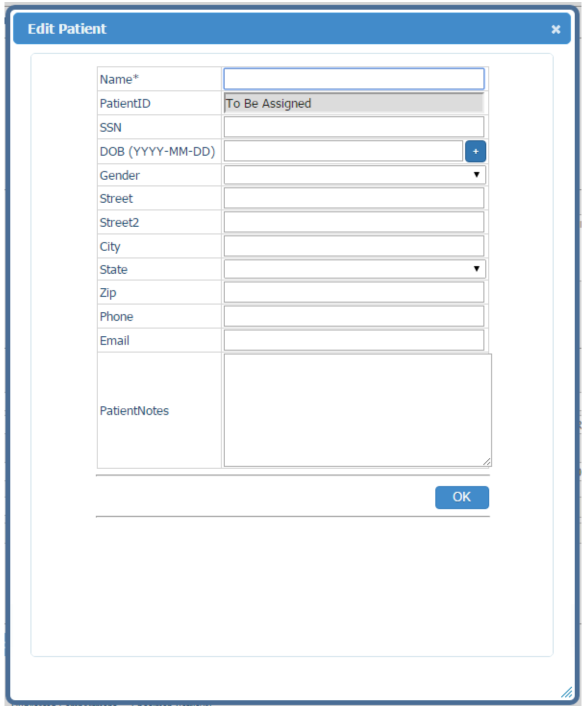


Figure 4-3: : Edit Patient Window

Edit Billing Window

Fields displayed/required are dependent on the configuration by the laboratory and may differ from the ones displayed below. There are four sections in this window.

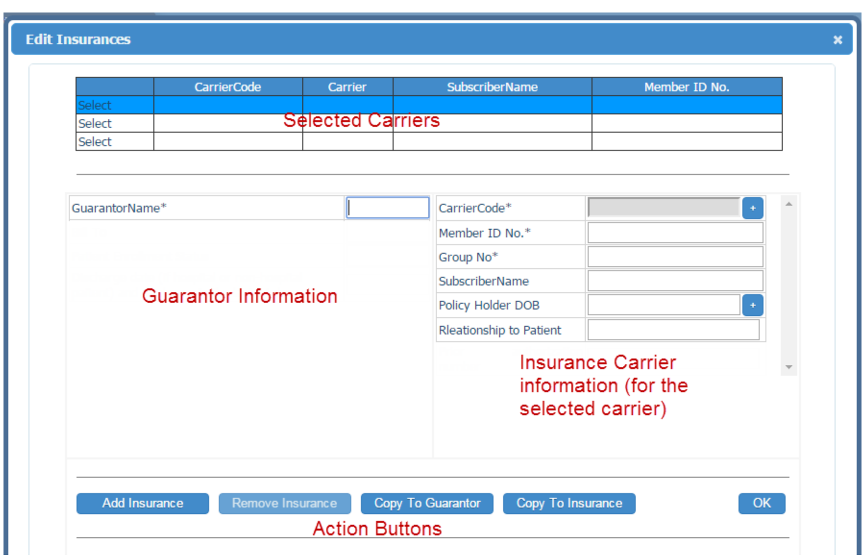


Figure 4-4: : Edit Patient Window

Selected Insurance Carriers

This section displays the insurance carriers which exist for the current patient. Up to three carriers can be identified for each patient. To add an insurance click the Add button at the bottom of the window. To modify an existing insurance carrier, select it by clicking the 'Select' button next to the insurance carrier. When selected, the insurance carrier will be highlighted gray. The existing details of the insurance are displayed in the right side of the window. New Information for an insurance carrier will be displayed in the defined Insurance Carrier section of the window as it is being entered; no saving is necessary. To

Caution
To enter a new carrier, select 'New'. Do not type over existing insurance information.

Guarantor Information

This information is entered on the left side of the Billing window. The patient name address and phone number may be copied from the patient window by selecting the 'Copy To Guarantor' button at the bottom of the window. If this information is different than the patient, then it must typed in by the user. The information entered in this section remains the same regardless of the insurance carrier selected.

Insurance Information

This information is displayed on the right side of the Billing window. Information may be copied from the Guarantor portion of the window by selecting the 'Copy To Insurance' button at the bottom of the window. If this information is different than the information in the Guarantor section, then it must be typed manually by the user.

Action Buttons

New Insurance: To Add a new insurance carrier when a carrier is already displayed in the Insurance Information section of the window, select the 'New Insurance' button. Typing over an existing carrier will overwrite the carrier. When three insurance carriers have been identified, the 'New Insurance' button becomes dithered indicating that the maximum number of insurance carriers has been reached. When three insurance carriers are present, one or more of the existing carriers must be removed before a new carrier can be added.

Remove Insurance

To delete an insurance carrier, select the insurance carrier from the Defined Insurance carrier section (if it is not currently selected). Then select the 'Remove Insurance' button. The insurance is immediately removed so use with caution.

Copy to Guarantor

Copies the patient information from the Patient window to the Guarantor section of the Billing window.

Copy to Insurance

Copies the information from the Guarantor section of the Billing window to the Insurance section.

OK

Accepts the billing entries and displays the Order Entry window.

Caution
Selecting the OK button in any of the Edit window performs a field validation to verify that the entered information consists of valid entries. Therefore, don't close windows in Outreach using the 'X'.

Edit AP Order Window

To enter the AP test information, select the 'Edit AP Order' button.

The information on the left side of the window is order specific. It can be specified once per order. The information on the right side of the window is test specific. The information can be entered for each selected test. Click "Add Specimen" to add additional specimens to an order. Each time a specimen is added, it is displayed in the selected tests section of the window.

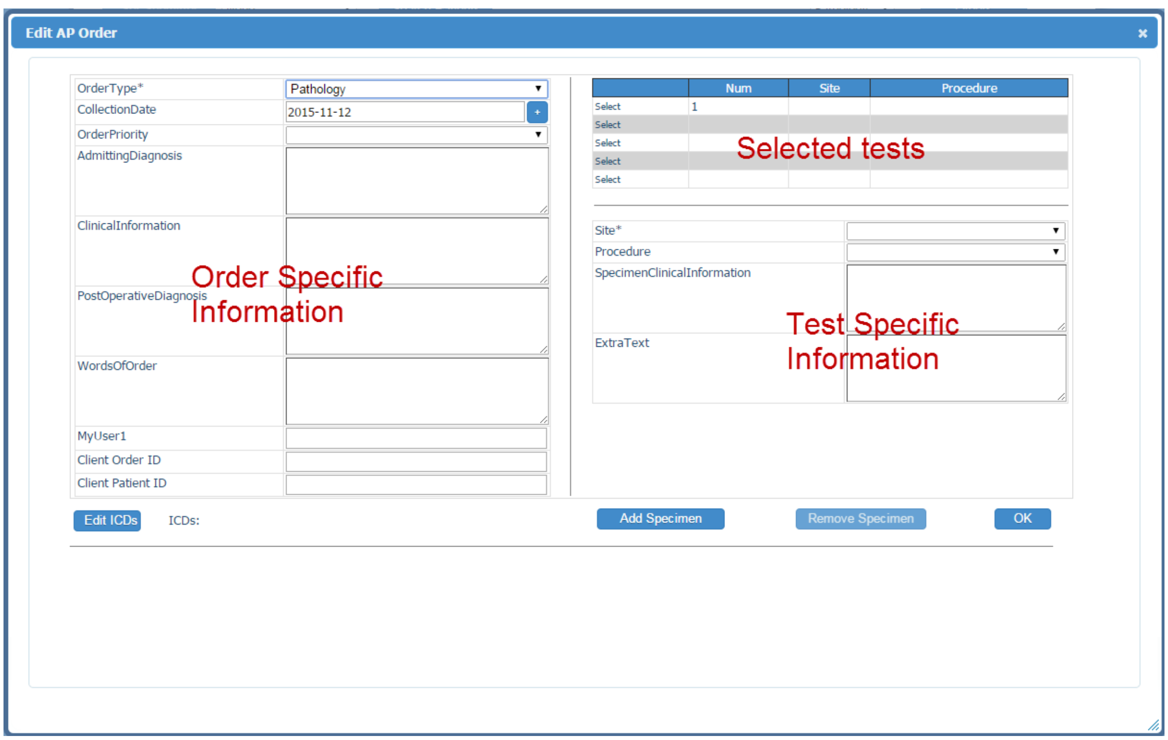


Figure 4-5: : Edit AP Order Window

<u>ORDER DETAILS</u>

Order Type: This information is defined by the laboratory and stored in Library/Order Type.

Collection date/Time: The order collection data/time defaults to the current date/time. It can be altered as needed. The colon (:) can be omitted when entering the collection time. Invalid dates are prohibited.

Order Priority: The information in this listing is defined by the laboratory and is stored in the Phrases library.

Admitting Diagnosis: Information in this listing is defined by the laboratory and is stored in the Phrases Library.

Clinical Information: Information in this listing is defined by the laboratory and is stored in the Phrases Library.

Post Operative Diagnosis: Information in this listing is defined by the laboratory and is stored in the Phrases Library.

Words of Order: Information in this listing is defined by the laboratory and is stored the Phrases Library.

SELECTED SPECIMENS

This section lists the specimens that have been selected to be included in the current order. To make a modification to a specimen, highlight it so it's details are populating the right hand side of the window. (The highlighted specimen will display a gray row in this section).

SPECIMEN DETAILS

Site/Procedure: Information in this listing is defined by the laboratory and stored in the Source Library.

Specimen Clinical information: Information in this listing is defined by the laboratory and stored in the Source Library.

Extra Text: Information in this listing is defined by the laboratory and stored in the Source Library.

ACTION BUTTONS

Add Specimen: This option is used when there is a specimen populating the Specimen Details side of the window and you want to add an additional specimen to the order.

Remove Specimen: This option is used when there is a specimen displayed in the Specimen Details section of the window and the user doesn't want to include the specimen in the order.

Edit Clinical Order Window

To enter the clinical test information, select the ‘Edit Clinical Order’ button. There are five sections in this window:

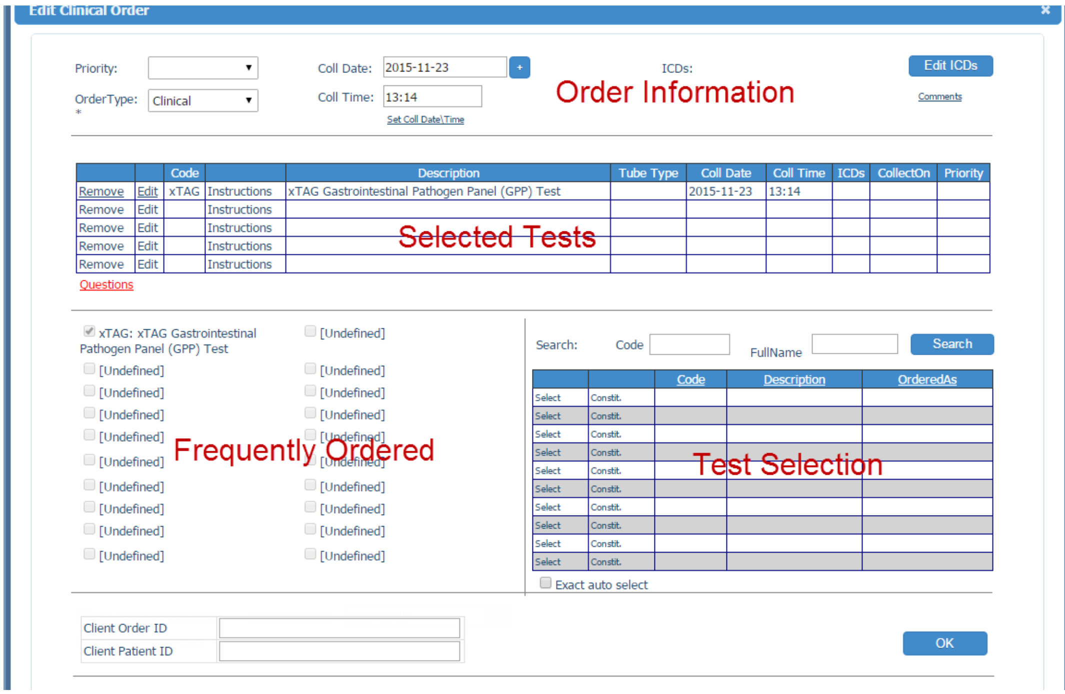


Figure 4-6: Edit Clinical Order Window

<u>ORDER DETAILS</u>

Order Priority: The information in this listing is defined by the laboratory and stored in the Phrases library. This information can be modified at the test level by selecting the Test Edit Link next to the test needing modification.

Order Type: This information is defined by the laboratory.

Order date/Time: The Order date/time default to the current date/time. When modifying the Order time, the colon (:) can be omitted. Dates/times in the future are not permitted. This information can be modified at the test level by selecting the Edit Link next to the test needing modification.

Edit ICDs: This button displays a window allowing the entry of the ICD codes that are applicable to the patient’s condition(s).

ICDs: A read only field that displays the previously selected ICD9 codes for the order.

Comments: General order comments are entered here. Depending on the system used, this information may be mapped to a corresponding LIS field.

<u>SELECTED TESTS</u>

This section lists the tests/profiles that have been ordered.

FREQUENTLY ORDERED TESTS

This is where the twenty most commonly ordered tests/profiles for the logged user are stored. This list is built as the user orders tests using Outreach. To choose one of the tests in this section click on the check box next to the test and it will be added to the current order.

TEST SELECTION

Tests can be searched for by either full/partial code or name by simply typing the criteria and selecting the 'Run' button. Once the desired test is displayed, choose it by clicking on the 'Select' link to the left of the test.

If the selected test has Ask At Order questions, they will be prompted to be answered automatically. If changes to a previously prompted Ask At Order question are needed, Choose the Edit Link next to the test needing modification.

Edit Clinical Test/Questions Window

This window displays the collection details for each test. It includes the test Priority, Date, and Time of collection. This information defaults to the information specified for the order but can be modified as needed for each test. Also displayed are the questions/responses for applicable test level Ask At Order questions.

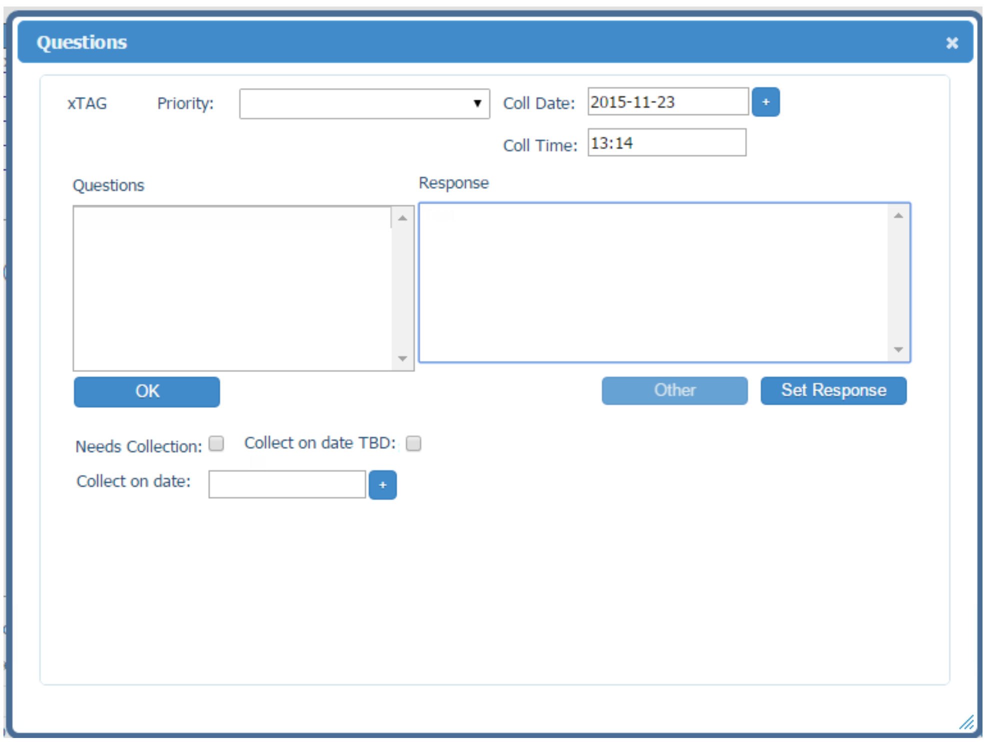


Figure 4-7: Edit Clinical Test/Questions window

Placing An Order

An order can only be placed once all of the required Order Entry information has been entered. To place an order, click the Place Order button at the bottom of the Order Entry window. A requisition and label will be displayed for printing (if applicable) and the order will be assigned a requisition number. The status of the order changes from New to Open.

CHAPTER 5
OUTREACH MANAGER

Outreach Manager is an administrative module that allows laboratory System Managers to define users, library items, forms, and preferences. It consists of a Menu Bar and equivalent easy to use point-and click icons so items can be accessed by using either the keyboard or the mouse.

LIBRARY WINDOW STRUCTURE

Navigation

There are several useful navigation tools in Outreach Manager These features are described below:

SEARCHING FOR RECORDS

Most windows include the ability to search for pieces of information. It will usually include a search criteria field and a button with binoculars on it. When a library is selected, you must select search to display the existing library items and also a library item entry grid.

THE ELLIPSIS BUTTON

There may be data fields that contains a button with three dots, also called an ellipsis (...) This indicates that there is more information available. Click on the ellipsis to open a window that provides field-specific choices.

REQUIRED FIELDS

Fields that contain and asterisk (*) following the field label are required for data entry.

SAVE/SAVE+

Most Library items contain a Save button, which saves the current record. The Save+ button will save the record and open a new blank window for a new record to be entered.

CTRL+S is the keyboard shortcut for Save.

CTRL+SHIFT+A is the keyboard shortcut for Save+.

AUDIT TABLE

Many of the Library windows have an Audit button. Clicking this button displays a window that contains a basic audit trail of anything that has happened to that record.

CTRL+T is the keyboard shortcut for the Audit Window

RETIRE

Library items can be retired. When retired, they are no longer displayed in Outreach. Retired items are visible by checking the "Retired" checkbox at the top right of the library window. Retired items are displayed in red font.

Window Setup

The main windows in Outreach Manager are *simple list type* windows.,They contain a list on the left which is displayed after selecting the search button. A detail grid on the right displays the details of the selected record from the list on the left. An example of this window type is below.

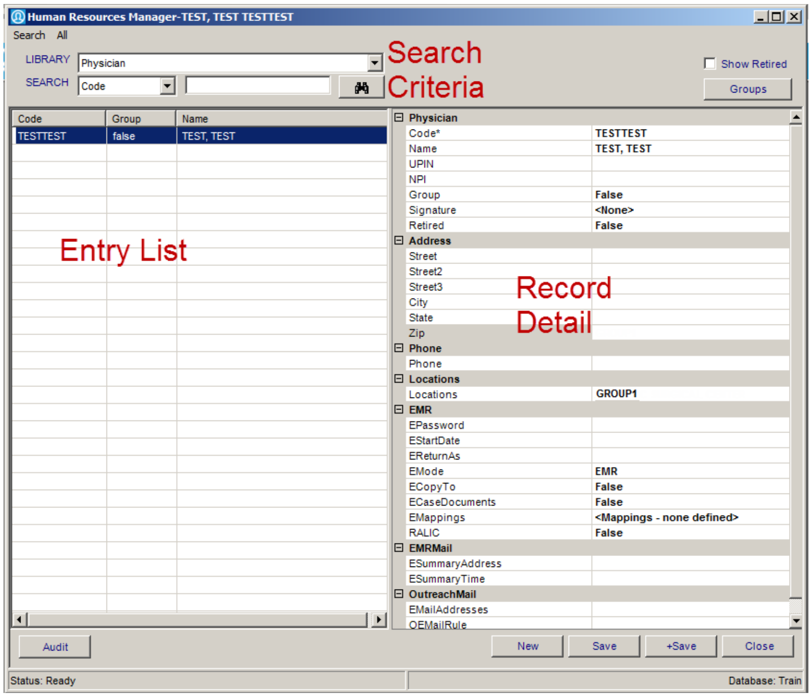


Figure 5-1: Simple List Type Window - Physician

User Defined tables and Display Fields

Many of the items in Outreach are user definable which allows the laboratory System manager to customize the application to suit their needs. Data entry field labels can be changed and user definable fields can be used to specify additional data items to b e stored with the order. In addition, many default entries can be predefined.

These parameters are defined through the Outreach Manager *Configuration* window.

OPERATIONS

Library Manager

The Outreach Manager Library is used to maintain all libraries associated with Outreach. Below is an overview of each libraries functionality.

Ask at Order Questions

This library contains a list of questions for use during Order Entry. Ask at order entry questions are maintained using the Ask At Order Manager discussed later in this chapter.

Ask At Order Responses

This library contains a list of answers to Ask At Order questions. Ask at order entry responses are maintained using the Ask At Order Manager discussed later in this chapter.

Coded Phrases

The Coded Phrases Library contains several pre-defined sub-categories called Box Names. They function as library subcategories. The box names are described below.

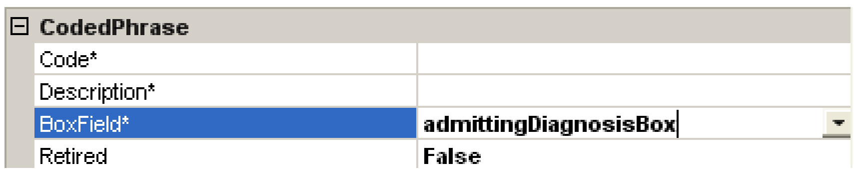


Figure 5-2: : Coded Phrase Definition Window

Table 1: Coded Phrase Box Names

Box Name	Pathology/ Clinical	Window used in Outreach Orders
Admitting Diagnosis	Pathology	Edit Pathology Order window
Clinical Information	Pathology	Edit Pathology Order window
Post Op Diagnosis	Pathology	Edit Pathology Order window
Special Instructions	Pathology	Edit Pathology Order window
Order Priority	Both	Edit (Path/Clin) Order window
Specimen Clinical Information	Pathology	Edit Pathology Order window
Extra Text	Pathology	Edit Pathology Order window
Marital Status	Both	Edit Billing window
Relation	Both	Edit Billing Window
Last Period	Pathology	Edit Pathology Order window
Patient User1	Both	Edit Patient window
Patient User2	Both	Edit Patient window
Patient User3	Both	Edit Patient window
Order User1	Pathology	Edit Pathology Order window

Table 1: Coded Phrase Box Names

Box Name	Pathology/ Clinical	Window used in Outreach Orders
Order User2	Pathology	Edit Pathology Order window
Order User3	Pathology	Edit Pathology Order window
Case User1	Both	Edit (Path/Clin) Order window
Case User2	Both	Edit (Path/Clin) Order window
Case User3	Both	Edit (Path/Clin) Order window
Order Specimen User1	Pathology	Edit Pathology Order window
Order Specimen User2	Pathology	Edit Pathology Order window
Order Specimen User3	Pathology	Edit Pathology Order window
Order clinical User1	Clinical	Edit Clinical window
Order clinical User2	Clinical	Edit Clinical window
Order clinical User3	Clinical	Edit Clinical window

* Required Field

Table 2: Coded Phrase Box Name Field Descriptions

Field Name	Description
Code*	The unique code for the entry (not displayed to the end-user).
Description*	The description of the phrase as it is displayed for selection during Order Entry
Box Field*	See "Coded Phrase Box Names" on page 29
Retired	True = Inactive, False = Active

CPT Definition

Contains a listing of all of the CPT codes for use with Outreach.

Table 3: CPT Code Definition Table Field Descriptions

Field Name	Description
Code*	Must be unique. This field will not allow duplicate codes.
Description	Description of CPT Code (the code Name)
Constituents	Displays the related ICD code(s) that are used for medical necessity checking. If no ICD codes have been identified for the CPT Code 'No ICDs defined' is displayed in this field.
Retired	True = Inactive, False = Active

* Required Field

ICD DEFINITION

Contains a listing of all of the ICD codes for use with Outreach.

Table 4: ICD Definition Table Field Descriptions

Field Name	Description
Code*	Must be unique
Description	Description of Code
Retired	True = Inactive, False = Active

* Required Field

INSURANCE DEFINITION

Contains a listing of all of the defined insurance carriers that are available for selection in the Outreach Order Entry Billing window.

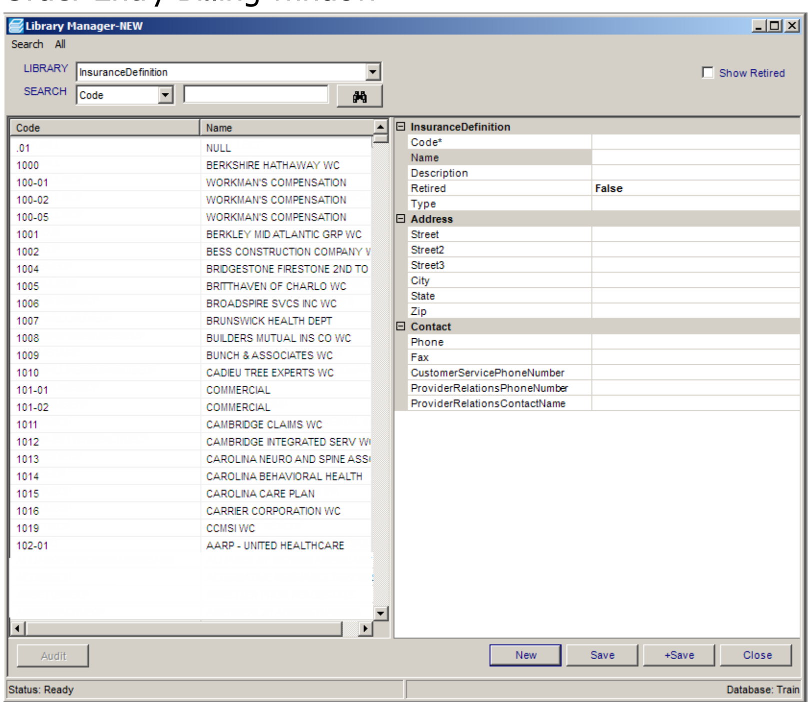


Figure 5-3: : Insurance Definition Window

Table 5: Insurance Carrier Field Descriptions

Field Name	Description
Code*	The unique code for the entry (not displayed to the end-user).
Name*	The insurance carrier name as it is displayed for selection during order entry.

Table 5: Insurance Carrier Field Descriptions

Field Name	Description
Description*	The description of the insurance carrier (can be the same as name if necessary).
Retired	True = Inactive, False = Active
Street	Carrier Address address
Street2	2nd field of the carrier address
Street3	3rd field of the carrier address
City	Insurance Carrier City
State	Insurance Carrier State
Zip	Zip Code
Phone	Insurance Carrier Main Number
Fax	Insurance Carrier Fax Number
Customer Service Phone	Insurance Carrier Customer Service Number
Provider Relations Phone	Provider Relations Number
Provider Relations Contact Name	Provider Relations Contact Name

** Required Field*

OUTREACH ORDER TYPE

Contains a list of order types that can be selected in the Outreach Edit Order window.

Table 6: Outreach Order Type Field Descriptions

Field Name	Description
Code*	The unique code for the entry (not displayed to the end-user).
Description	The description of the Order Type (displayed to the end-user during order entry).
Is Clinical	True = Order type will display in the Edit Clinical Order/Order Type drop down. False = Order Type will not display in the Edit Clinical Order/Order Type drop down.
Is PAP	True = When an PAP order type and one specimen have been selected in the Edit AP order window, the add specimen button becomes dithered.. False = Unlimited specimens can be selected in the Edit AP order window
Accession Letter	The Case Number prefix required in WindoPath. Note: Requisitions can have the same accession letter and different requisition forms.

Table 6: Outreach Order Type Field Descriptions

Field Name	Description
Site Default	The site that is displayed by default in the Edit AP Order window.
Sources	The list of specimens which can be selected. The sources listed here will display in Outreach when the order type has been selected.
Requisition	The requisition that is used with the order type. When a requisition has been identified, the 'Has requisition' field will display as True. If no requisition is selected, the 'Print Requisition' button will be dithered in the Order Entry window.
Required	This field is used to create a different set of required fields than the default required fields that have been specified (in Configuration/Field Display). If no override is needed then this field can remain unmodified. An override set of required fields can be created for this order type by clicking the ellipsis button and then selecting the required fields for this order type. Once the fields have been selected, click *Save*. The Clear button is used to clear the selection and start over.
Visible	This field is used to create a different set of visible fields than the default visible fields that have been specified (in Configuration/Field Display). If no override is needed then this field can remain unmodified. An override set of visible fields can be created for this order type by clicking the ellipsis button, and then selecting the visible fields for this order type. Once the fields have been selected, click *Save*. The Clear button is used to clear the selection and start over.
Requisition	Click the ellipsis to select the requisition to be used with the Order Type.
Has Label	True = A label has been identified in the label designer for the selected requisition. False = No label has been identified. This is not a modifiable field; it is configured in the Requisition Designer (the field is called "Label").
Has Requisition	True = A requisition has been identified (see Requisition Field above) False = No requisition has been identified. This is not a modifiable field. It is configured from the Requisition field in this library.
Retired	True = Inactive, False = Active

** Required Field*

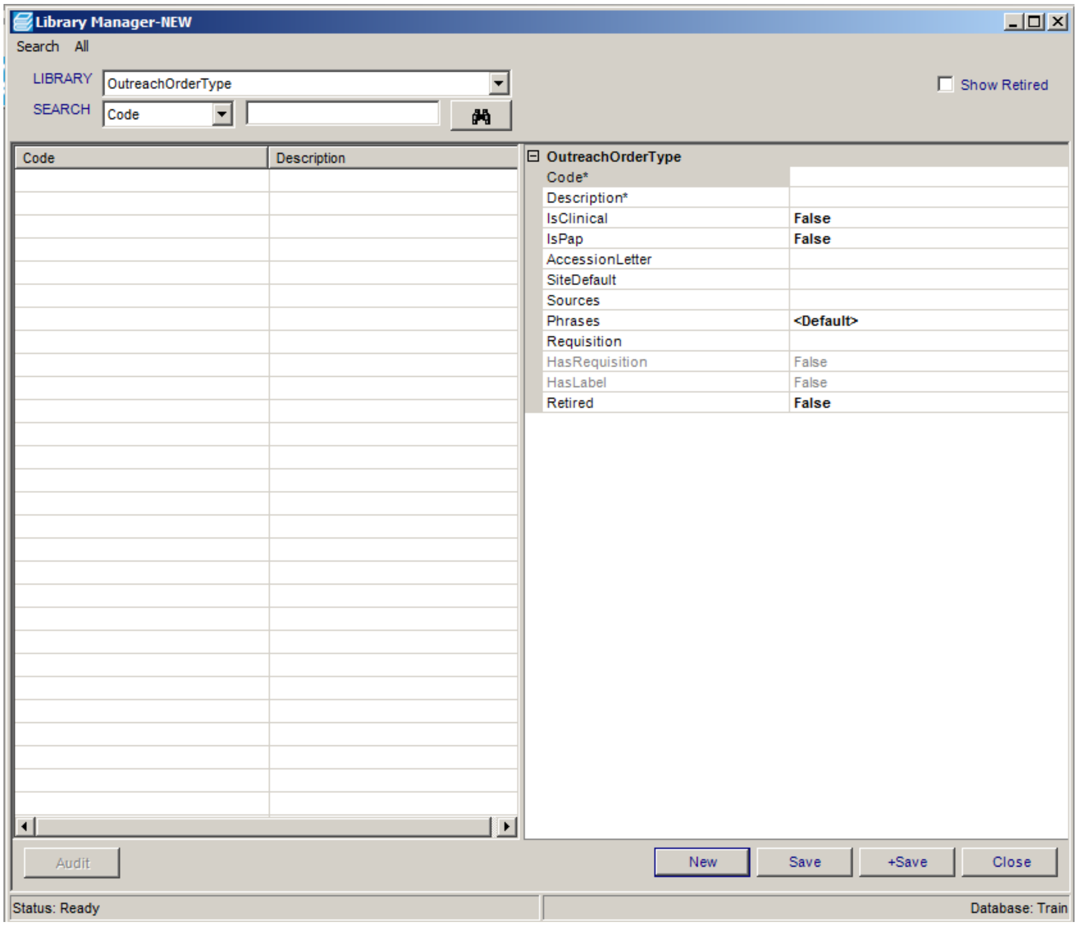


Figure 5-4: : Outreach Order Type Window

Physician Library

Table 7: Physician Fields

Field Name	Description
Code*	Must be unique. This is a required field. Note this 'Code' is used as the User Code to log onto the WebPath Client Service application.
Name	Physician Name (Format should be consistent for all entries).
UPIN	Physician UPIN
NPI	Physician NPI
Phone	Physician phone
Group	True = Physician entry is a group practice, False = physician entry is an individual physician. Note: If the entry in the group, then it should contain only 1 location (one that points back to the group). All other 'locations' will be ignored.
Retired	True = Inactive Physician record, False = Active Physician Record

Field Name	Description
Address	Physician's address
Locations	Consists of the Physician's Ordering (Fax) Locations.This table is a 'child' of the physician table. For additional information, see "Physician Locations" on page 14.
Clinical Fee Schedule	For Clinical use only. Displays for group records. Allows the definition of physician office specific test fees. See page 36 for additional information on setting up specific test fees.
EPassword	EMR Internet Interface/AutoPrint use only. The password that the physician's office will use to log on to the WebPath Client Service application.
CopyTo	Set to True will enable the physician (or group) to also receive reports when named as admitter, or consulter on a report. Note: If this option is changed, it will only affect reports generated from that moment forward.
ESummary Address	Only for the physician who wish to get EMR results notification. The email address list here is where the notification being sent.
ESummary Time	The EMR results notification being sent at this specific time. (i.e. 14:00) is 2 p.m. in the afternoon.
Withhold Group Results	Only for Physician Records with Group = True. Set to true will prevent the physician's groups from displaying in the group drop down list FOR ALL USERS except laboratory.

Table 8: Physician Location Fields

Field Name	Description
Location	When a new Physician entry is saved, a default ordering location is created (based on the physician group field). For example, if the entry is a group, then the location created points back to the group. If the related physician record is not a group, a location is created that has no group designation. If the physician has more than one ordering location, it is best to modify the location name to make it easier to identify in the Order Entry window location window. Every physician record will, by default, have at least one ordering location.
Phone	The physician's phone number at the specified location
Fax	The physician's fax number at the specified location
EMail	The physician's e-mail address at the specified location
Retired	True = Inactive, False = Active

Field Name	Description
Group/Physician	The listing, displays all physician table entries with the group field = True. Entries are made in this field is if the specified location IS a group.
Withhold Group Results	Only for Physician Records with Group = True. Set to true will prevent the selected group from displaying in the group drop down list FOR ALL USERS except laboratory.

User Library

Table 9: User Table Fields

Field Name	Description
Code	Code used to login to Outreach/Outreach Manager. This code must be unique. No two users can have the identical user code.
Password	The password used in conjunction with the code to log into Outreach.
User Name	The name of the user. Make sure that all entries are made using the same format.
Password Expires	Default -Password expires in the number of days set in the preferences, Never - password never expires. Expired Password - user will be required to change it upon initial login.
Retired	True = Inactive account, False = Active account
Bridge	Identifies the demographics bridg(es) that the user is able to access.
Disabled	True = Account has been disabled due to more than 3 consecutive incorrect login attempts. User will not be able to login to Outreach until this is set to false. False = Account is not disabled
Message Recipient	This functionality is not in use.
Outreach Admin	True = User can access to Outreach Manager. False = User can’t access Outreach Manager

Table 9: User Table Fields

Field Name	Description
Outreach Mode	Users will have access to only those modules that have been purchased however, they may further define user's access at the user account level as follows: Default: User has access to all modules purchased Results: User can access results only Orders User can access orders only OrdersAP: User can access AP Orders only Orders Clinical: User can access Clinical Orders only ResultsOrders: User can access Results and AP/Clinical Orders ResultsOrdersAP: User can access their Results and place AP Orders ResultsOrdersClin: User can access their Results and place Clinical Orders
Suppress Group Results	This is applicable to users that are members of one or more physician groups. Set to True the user will not see the results for their groups in Outreach; they will see only the results where they are the named physician. Set to False, a user will see their results in Outreach as well as the results for the other group members.
Physician	The linked physician record which determines order/result information available to the user. See See "e.outreach User Types" on page 10.

Configuration

CONFIGURATION MANAGER

Contains a list of preferences that pertain to e.lixa products.

Table 10: Outreach Preferences

Preference	Description/Details	Scope	Values
AllowSkipBilling	Orders - Enable users the option to skip the entry of billing information System Default is False.	SiteWide	True/False

Table 10: Outreach Preferences

Preference	Description/Details	Scope	Values
AlwaysDefaultPDFReport	Always use system defined default report instead of the LIS report	SiteWide	True/False
APSpecimenDisplayCount	Define the number of specimens displayed on the AP Order Entry page. (The minimum number is 3)	SiteWide	
AutoAcceptOutreachOrders	Orders - Legacy preference for clinical sites that do not have order flagging	SiteWide	True/False
CLIANumber	Site's CLIA identification number (used on ABN forms).	SiteWide	
CodedPhraseCodeSort	Sort Coded Phrase selection lists by defined code instead of description	SiteWide	True/False
CodeMapFileDirectory	Directory location where NCD Code Map files are stored.	SiteWide	
CollectionWorklist	Orders - Set the name of the collection work list definition to use as the system default	SiteWide	
CustomLoginHTML	Set HTML text to display on login page (requires login to Outreach to load)	SiteWide	
DaysPasswordsValid	Sets the number of days passwords are valid.	SiteWide	
DefaultCollectOnIfEmpty	Use the calculated default 'collect on' date if the 'collect on' date is omitted.	SiteWide	True/False
DefaultCollectOnIncrement	The number of days to increment (from days) to establish the default 'collect on' date. (Example 1 = tomorrow)	SiteWide	
DefaultNewReports	Results - Default Results display to list only reports not yet viewed by the logged user.True: The Result window displays reports that have not been viewed only. False: The Result window displays reports that have and have not been viewed.	SiteWide	True/False
DefaultPDFReportName	Set the name of the report definition to use as the system default. Name must match the report name defined in the report designer.	SiteWide	

Table 10: Outreach Preferences

Preference	Description/Details	Scope	Values
DisableBilling	Orders - Disables access to Billing information. System Default is False. Double click row to change to True/False. True: The Edit Billing button is disabled. No access to the Billing window is permitted. False: The Edit Billing button is enabled allowing access to the Billing window.	SiteWide	True/False
DisabledDisplayMessage	Message to display to user when a login is disabled. System Default is "Your Login has been disabled, please contact your Admin or Manager to reset".	SiteWide	
DisallowGroupSubmitter	Orders - Disallow selection of submitting physician that is defined as a group.	SiteWide	True/False
EnableAutoNew	Orders - Display check box to determine if a new order is created automatically upon saving.	SiteWide	True/False
EnableAutoNew	Orders - Display check box to determine if a new order is created automatically upon saving.	SiteWide	True/False
EnableDefaultPDFReport	Enables using a system define default report when LIS Report not found	SiteWide	True/False
EnableExactAutoSelect	Displays the exact auto select option on the Order Clinical Test page and ICD pages.	SiteWide	True/False
EnableFreeFormSSN	Enable Patient SSN to be alphanumeric and validated on length only	SiteWide	True/False
EnableGraphAsPDF	Enables building graphs as PDF files for saving and printing	SiteWide	True/False
EnableHistory	Clinical Results - Display History Column	SiteWide	True/False
EnableInsuranceDefinitionCreation	Orders - Enable Insurance definition record creation during order entry	SiteWide	True/False

Table 10: Outreach Preferences

Preference	Description/Details	Scope	Values
EnableOpenOrdersLink	Orders - Displays a link indicating that other open orders exist for the selected patient.	SiteWide	True/False
FutureCollectionDelta	Number of delta seconds allowed for a future collection date.	SiteWide	
HIPAA Acceptance Message	Message to display when prompting for HIPAA acceptance	SiteWide	
HIPAA Acceptance Required	Requires HIPPA acceptance on login	SiteWide	True/False
HIPAASingleAcceptance	Require only an initial acceptance of the HIPAA display message upon login	SiteWide	True/False
InitOrderDays	Orders - Default Days back to search	SiteWide	
InitResultDays	Results - Default days back search	SiteWide	
PatientCodePrefix	Define a prefix to assign to system generated patient codes	SiteWide	
RequiredICDsAP	Required ICDs for AP Order Entry	SiteWide	True/False
RequiredICDsClinical	Required ICDs for clinical Order Entry	SiteWide	True/False
StaticOrderMessages	Orders - Define static order entry display messages for information purposes	SiteWide	
UseCaseHistory	Results - Depslays a list of the patient's historical cases when viewing a report.	SiteWide	None, Restricted, Unrestricte d
VisitCodePrefix	Define a prefix to assign to system generated visit codes.	SiteWide	
VisitCodePrefix	Define a prefix to assign to system generated visit codes	SiteWide	

Requisition Designer

The Requisition Designer allows System Managers to Add/Modify/Delete Requisition Forms used with Outreach Order Entry.

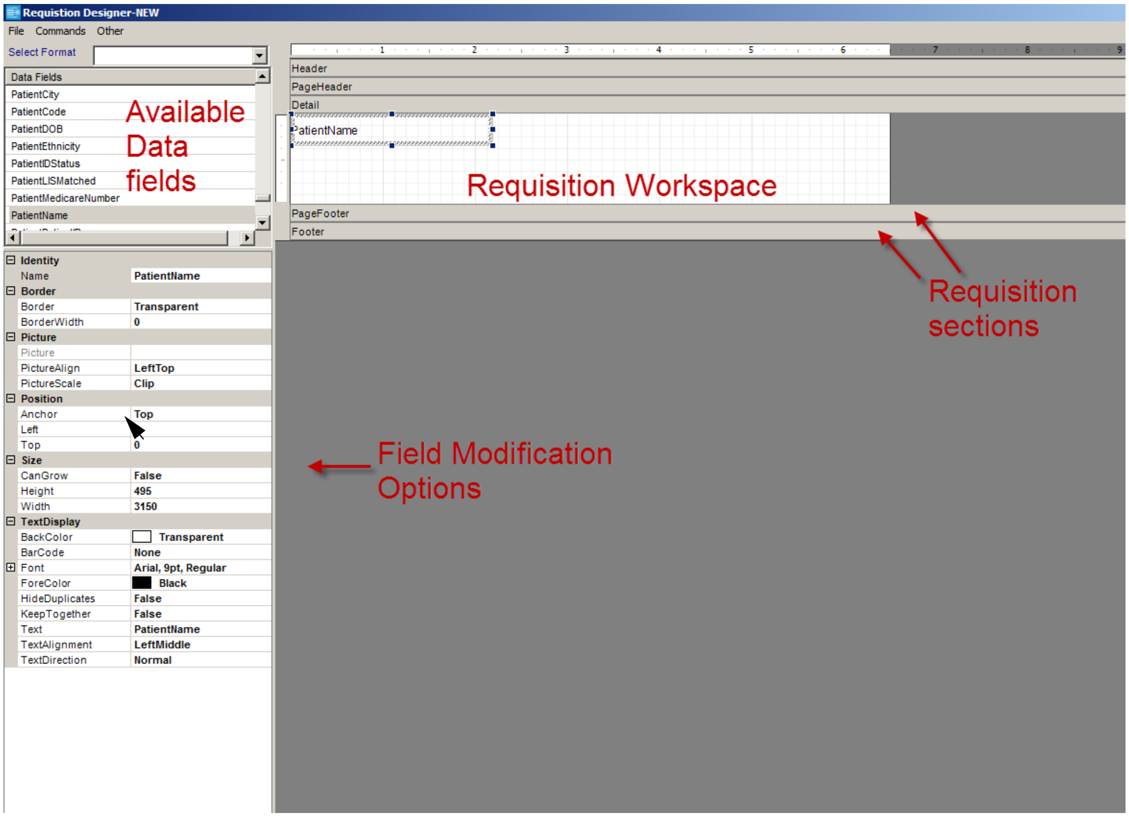


Figure 5-5: :Requisition Designer

The Requisition Designer workspace contains 5 sections:

1. Header - Information entered here displays on the first page.
2. Page Header - Information entered here displays at the top of every page.
3. Detail - Repeating information (such as tests ordered) is entered here.
4. Page Footer - Information entered here displays at the bottom of every page.
5. Footer - Information entered here displays on first page.

Requisition Specifications

There are several items which can be used to make changes to the requisition form. Note: These items make changes to the entire page, they are not used to make changes to the individual fields on the requisition.

Name - The Name of the Requisition form. The requisition name will be displayed at the top of the window once it has been saved. This is a required field.

Description - the Description of the requisition. This field may be left blank if desired.

Label - What label should be used with this requisition. The label is chosen from a listing of defined labels. If not using labels, leave this field blank.

Paper Size - What is the size of the sheet of paper that the requisition will be printed on.

Retired - True = Inactive, False = Active

Page Margins (Left, Right, Top, Bottom)

Field Selections

Fields that can be used on the requisition are displayed in the Field Selections section of the window.

How to add a field to a requisition

- **Before choosing the field(s) to be added to the requisition, be sure that the correct requisition is displayed in the requisition layout section.**
- **Double click a field and the field will be placed in the selected section.**
- **Drag and drop the field into the desired location or position it numerically using the Field Modification Options.**
- **Changes to the appearance of the field are made by selecting the field and then choosing from the Field Modification Options.**

Field Modification Options

Border

Border - Type of border displayed around the field.

Border Width - Choose the thickness of the border chosen.

Position

Left - The horizontal position of the field on the page.

Top - The vertical position of the field on the page.

Size

Can Grow - set it to True when you want the field expandable to fit the text.

Height - The height of the field

Width - The length of the field

Text Display

Back Color - The color of the field.

Bar Code - The format of the bar code, such as Code39

Font - The field text font

ForeColor - Text Color

Text - What is the text that appears in the field.

Text Alignment - How is the text displayed in the field.

Text Direction - Normal = left to right, Up = Bottom to Top, Down = Top to Bottom

When there is no field selected in the window, requisition specific settings can be made.

Margins

Bottom - Page bottom margin

Left - Page left Margin

Right - Page right Margin

Top - Page top Margin

COMMANDS MENU

Select All - Used to select all the fields on a requisition at once

Label Designer Action Buttons

Add Field - Inserts a blank field on the requisition

Add Image - Allows an image to be inserted onto the requisition

Copy - Copies a selected field. An exact duplicate of the selected field is made.

Print Test - Outputs the requisition form to the selected printer.

Preview - Allows a user to preview the requisition form on screen.

New - Creates a new form

Save - Saves the new Requisition form.

Save As - The new form is saved with a particular filename. Note the requisition must be saved before it can be 'Saved As'. Note: If a requisition is Saved As a requisition with the same name, the user will receive an overwrite prompt and be asked choose *YES* to overwrite the or *NO* to not Save.

Delete - Deletes the requisition that is on screen. **This option is not used to delete a field from a requisition.** To delete a field from a requisition, select it. Then when there are handles around the field, press the Delete key on the keyboard.

Close - Closes the requisition design window without saving. To add a date, time or page number on your Requisition or Label form, go to Commands menu and make your selection. Then drag and drop your selection to the section of the form and then modification of the display can be made just like the other fields.

The Label Designer contains 5 sections. Only the detail section is utilized when creating a label. All other sections are ignored.

LABEL INFORMATION

Used to Add/Modify/delete specimen labels used with Outreach Order Entry.

Name - The Name of the label.

Description - the Description of the label.

Retired - True = Inactive, False = Active

Because this portion of the application is designed to use label printers, the margins are not displayed. To size the label simply drag the label edges to the appropriate size.

User Summary

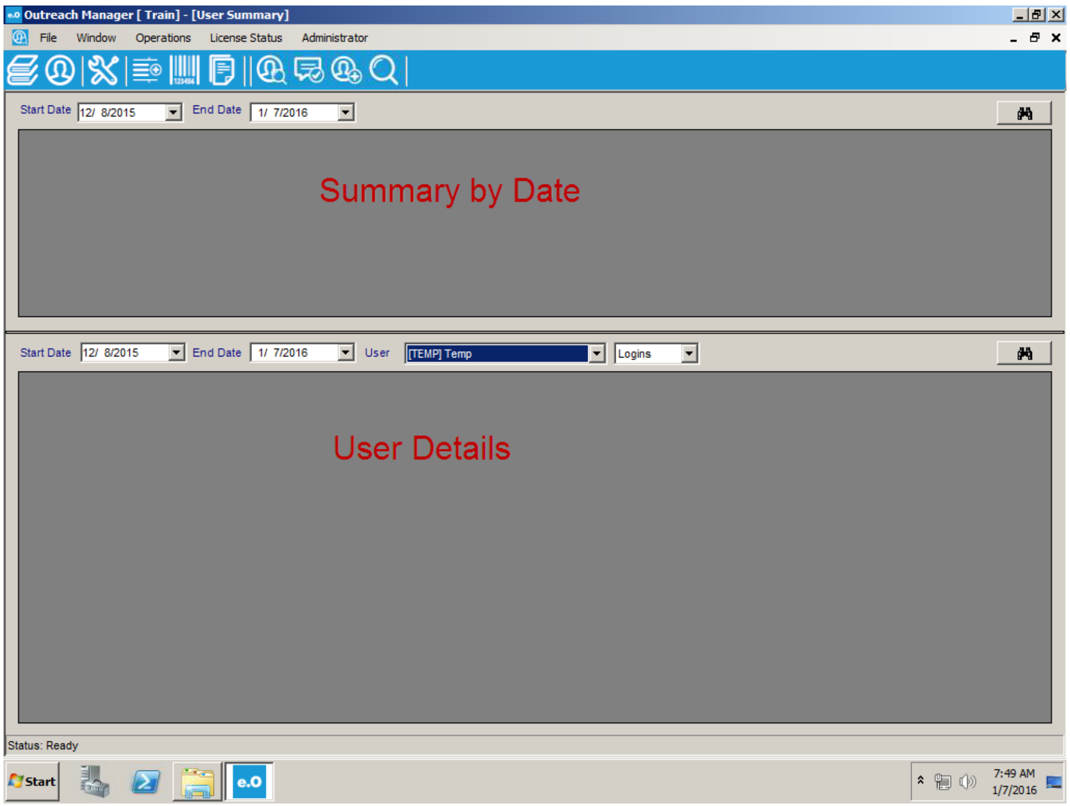


Figure 5-6: : User Summary Window

User Summary searches (2 Types):

Date Range Summary

The Summary by date provides a comprehensive list of all users that have used the system in a specific date range. Information identified for each user:

- User Code
- UserName
- Logins
- Reports Viewed
- History Viewed
- Orders Placed

USER DETAILS

The User Details provides user-specific activity details. System Administrator must select the user and the type of activity (either Logins/Orders/Reports). Information identified for the selected user:

- Order Date
- Name (patient)
- Patient Code (MedRec)
- Visit Code (Account Number)
- Requisition Number

Outreach Licenses

This option displays the total number of Outreach licenses purchased and the number used. An Outreach user is identified by the presence of a linked physician in the user table. The configuration for the license purchase is performed by Psyche Systems.

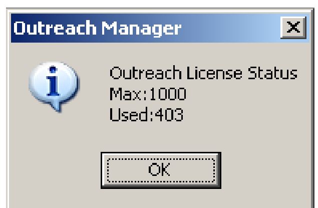


Figure 5-7: : Outreach License Status