Magentus

Working with Orders

Electronic Requesting

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Introduction

Purpose

The CRIS system is designed to enable the transition from paper requests to electronic ordering to facilitate a full paperless workflow. Order/Request Vetting is possible using Standard CRIS Vetting or in conjunction with the Full CRIS Vetting Module which includes exam protocolling.

This guide covers standard Vetting. Consequently, if you are using the CRIS Vetting Module you should refer to CRIS_CRIB_CM_299_Vetting to utilise the full Vetting Module and all associated functionalities.

Audience

This document has been designed for sites deploying order communications (electronic requesting), and those testing the functionality prior to its implementation.

Document Control

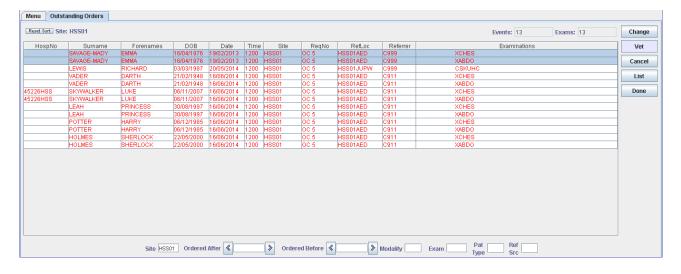| Title	Working with Orders (Electronic Requesting)		
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V2.0	16/06/2014	Emma Savage-Mady	First Issue for 2.09.10p
V2.1	25/01/2017	Emma Savage-Mady	Amendments to include linking and unlinking orders.
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Working with Orders (Electronic Requesting)

It is possible to use most system modes for processing orders - however Vetting, Appointments, Reception and Post Processing are the most common modes for users who are responsible for Vetting, Appointing and Attending events from the [Orders] List as CRIS will automatically highlight the most appropriate screens, fields, and buttons.

The CRIS Vetting Module is also intrinsically linked to electronic ordering and full details of this functionality can be found via CRIS_CRIB_CM_299_Vetting.

Reviewing outstanding orders via the Orders List

Orders are the electronic equivalent of a pile of paper requests waiting to be looked at. This means that we need to review and save the order as a CRIS request/event before it is formally acknowledged within the system.

The [Outstanding Orders] list shows all Orders received from a 3rd party PAS/HIS/OCS or EPR system, and these are displayed as a separate record for each exam as this is the way that HL7 sends messages. This means that you will need to multi-select all applicable exams/orders and amalgamate these into a single request/event before proceeding.

It is possible to filter the [Outstanding Orders] list using any combination of the fields at the bottom of the screen such as [Site], [Modality], [Exam], [Pat Type] or [Ref Src] by entering the code or choosing from a list via [F4] and clicking [List] to display the results.

Use the [Ordered After] field to filter for orders received only after this date, or [Ordered Before] field to filter for orders received only before this date, or a combination of the two for a specific date range. You can either [F4] to display a calendar to select from, or type the date required and click [List] to display the results.

To remove any filters, ensure the filter field is blank without any code selected and press [Enter] followed by the [List] button to display the results.

Sorting & configuring columns

It is also possible to sort any columns by clicking the column headers. The first time you click, it will sort ascending order (A-Z) and clicking again will change to descending order (Z-A). You can also choose to configure Table Columns by right clicking any column header and choosing the 'Configure Table Columns' option.

Configure table headers

Configure table headers enables you to add additional 'Available Columns' (e.g. NHS No.) by clicking the right hand [>] function or remove selected columns as applicable using the left hand [<] function. It is also possible to specify whether the columns should be Ascending or Descending by default before clicking [Save & Apply New Columns].

Please note: Any additional columns will remain by default until 'Reset to Default Columns' is selected by right clicking the column header and choosing 'Reset to Default Columns' from the resulting menu.

Configure table filters

Configure table filters enables you to filter a worklist using multiple values or fields – e.g. Examinations 'contains' XCHES, XABDO. This is very useful for bespoke lists such as MSK related examinations. Once selected, click [Save & Apply New Columns] to see the filtered column.

To remove a filter that has been added in this way right-click on the column header again and select [Remove Filter].

Please note: Table filters only remain within the session and are identified on the column header of any applicable column. It will therefore be necessary to apply filtering during each session.

Amalgamating single exams into multi exam request/events

HL7 orders are received from a 3rd party PAS/HIS/OCS or EPR systems as a separate record for each exam. This means that you will need to multi-select all applicable exams/orders for a specific patient and amalgamate these into a single request/event before proceeding.

To create a patient event using more than one order, hold down the [Ctrl] key and left mouse click to select all required orders. Click any item again to deselect it in the event you have made a mistake but remember to keep the CTRL key pressed.

If you want to select items that are adjacent, you can use the [Shift] key. Click the first item, then press the [Shift] key and hold it. Click the last item and release the [Shift] key. To select adjacent items, you can also use the mouse. Click the left mouse button on the first item, hold the mouse button, move the cursor to the last item and then release the mouse button.

Once you have all appropriate orders highlighted you should undertake whichever of the following processes is most appropriate to your required workflow.

Please note: All orders must be for the same patient, if not a warning message will be displayed. Magentus would additionally recommend that you consider if you would prefer to process mixed modality orders as separate request/events if they will be performed on separate days or reported by separate resources.

Changing orders into requests/attendances

Once all relevant order(s) are highlighted required and click [Change] to load into the Event Details screen to view all request details. In this example two separate orders for the same patient have been selected by highlighting both exams and clicking [Change]. This will bring all required examinations into the Event Details screen to generate a single 'Request'.

The full details associated with the Order(s) are displayed via the relevant field via the event details – e.g. 'Clinical History' via the field of the same name, and any associated notes via the 'Event Comment' fields in [History] in addition to 'Urgency' and 'Date' and 'Time' information for the order at the bottom of the 'Event Details' screen.

Additionally, where applicable to the event and where this is supported by the 3rd party system - CRIS will also display the 'Reason for Examination' and any 'Clinical Safety' questions via the [Q&A's] fields.

It is also possible to view much of this information by hovering over the 'ReqNo' column for the relevant patient order which also displays the 'Urgency' numerically (e.g. 5 - Urgent, 3 - Soon, 1 - Routine).

Changing an order into a 'Received' request

It is possible to acknowledge **'receipt of an order'** on CRIS via the use of the 'Received' status.

This enables 'Clerical Staff' to process 'Orders' and allocate them to clinicians for vetting/justifying via the use of the 'Practitioner' field in the 'Event Details' screen.

1. To do this, load the Order(s) into the 'Event Details' screen.

2. To assign the 'Request' to a specific Vetting Clinician click on the 'Practitioner' field at the bottom of the screen and enter the required code, or press [F4] to choose from a list. If you do not wish to assign a vetting clinician simply leave the 'Practitioner' field blank.

3. You can also choose to amend the 'Urgency' of the order/request at this point or leave as is as this can be amended retrospectively at any point.

4. Having reviewed/amended the order/request as required click the [Request] function button to load the 'Add Request' screen and complete the event by selecting 'Received' and clicking the [Save] function button.

5. In this screen you can also add any additional 'Status Comment' relating to reviewing the order, scan any additional documentation, print letters, or label or simply click [Save].

Accepting an order – standard vetting (without the vetting module)

Please note: If you are using the CRIS Vetting Module you should refer to CRIS_CRIB_CM_299_Vetting to utilise the full Vetting Module and all associated functionalities.

If you are not using the full CRIS Vetting Module you can still easily vet and justify orders as follows:

1. Select the 'Accepted' status which will also display the 'Practitioner' field.

2. Ensure the correct 'Practitioner' code is entered via the relevant field as this is the electronic signature of the authorising clinician. If the 'Request' was assigned to a named 'Practitioner' this will fill in automatically, so you will only need to check/amend if necessary.

3. Tick 'Justified' to indicate that you have vetted the order/request and can verify that the request is justifiable based on IRMER, or other associated guidelines.

Please note: Justification is a separate function to vetting/assigning protocols which enables sites to make the transition to the full Vetting Module at a pace that suits them.

4. The 'Status Comment' box is available to record any additional information such as prep requirements, protocols for performing the examination or reason for changing any examinations from the one(s) originally ordered.

5. To complete the process, click the [Save] function button.

Rejecting an order – standard vetting (without the vetting module)

Please note: If you are using the CRIS Vetting Module you should refer to CRIS_CRIB_CM_299_Vetting to utilise the full Vetting Module and all associated functionalities.

If you are not using the full CRIS Vetting Module you can still easily vet and justify orders as follows:

1. Select the 'Rejected' status to indicate the request has been rejected/ cancelled. When 'Rejected' is selected the [Practitioner] field will display.

2. Ensure the correct 'Practitioner' code is entered via the relevant field as this is the electronic signature of the authorising clinician. If the 'Request' was assigned to a named 'Practitioner' this will fill in automatically, so you will only need to check/amend if necessary.

3. You should use the 'Status Comment' box to type details of why you have rejected the order/request. This information will be transmitted to any 3rd party systems where this is supported or can be printed on rejection/cancellation letters if required.

4. To complete the process, click the [Save] function button.

Important Note

The following statuses are not designed to be used for rejecting requests but are often misused in this way. They are legacy statuses which have traditionally been used to hold a request pending further information, or an alternative course of action.
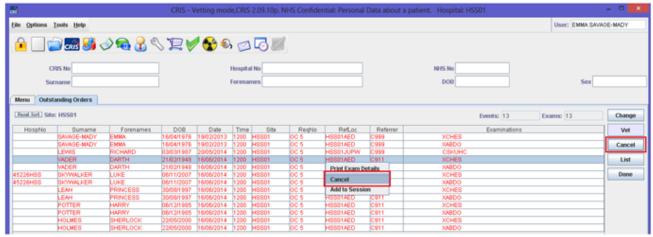
A 'Request Unjustified' status - indicates the request card is awaiting justification

An 'Awaiting Clinical Information' status – indicates the request card is awaiting clinical information.

Magentus would strongly recommend that you carefully consider the continued use of these statuses in relation to waiting times, as these types of requests will remain on Waiting List figures until formally 'Rejected'. It would be preferable to consider end dating these statuses upon agreement from the Consortium for Datacentre customers, or at Trust discretion for locally deployed Customers.

Cancelling from the [Outstanding Orders] list

It is also possible to cancel/reject orders directly from the [Outstanding Orders] List. To do this you should highlight the order for the patient that need to be cancelled and either click the [Cancel] function button, or right click the order to display the menu and left click on [Cancel].

The status will automatically default to Rejected in order to cancel/reject the order so it will just be necessary to ensure that you have recorded an appropriate 'Status Comment' and entered your 'Practitioner' code before clicking [Save] to complete the process.

Please note: It is necessary to cancel each order separately.

Changing an order into an Attendance, Waiting List, or Appointment

It is also possible to change order(s) straight into an attendance (e.g. via A&E) or immediately place an order on the [Waiting List], or [Add to Diary] to schedule an appointment.

Having selected the relevant order(s) you should click [Change] to load the 'Event details' screen and choose the appropriate function button as follows:

[**Attend**]	This option enables you to 'Attend' the patient for their examination.
[**Waiting List**]	This option should be used to place the examination(s) on a 'Waiting' or 'Planned' list.
[**Add To Diary**]	Use this option to make an appointment directly from the Orders List.

For further details on Attending, Appointing and Placing a Request on the waiting list please refer to CRIS CRIB RIS_CRIB267_Reception and CRIB RIS_CRIB266_Appointments.

Viewing orders via patient records

It is also possible to review and change orders via individual patient records by loading the relevant patient and selecting/amalgamating orders before selecting [Change].

Having opened the 'Event Details' screen you can proceed to click [Request] to change the order into a 'Received' request or to 'Accept' or 'Reject' the request. Alternatively, you could select [Attend], [Add to Diary] or [Waiting List] as applicable.

Linking & unlinking multi exam orders for a single cris patient

Unlinking orders

Scenario one: Two exams have been ordered/requested and have been incorrectly amalgamated into one overall CRIS event, when they should have been kept as two separate events for scheduling and reporting purposes.

Action: From the 'Events' list right-click and choose Unlink from Order > followed by the relevant examination and say [OK] to the resulting message. Having done this click to [Change] to open the CRIS event and delete the unlinked examination from the event and [Save] as normal.

Reload the patient record using [F9] and you can now change the unlinked order back into a separate CRIS Event.

Linking orders

Scenario Two: Two exams have been ordered/requested but have been incorrectly turned into two separate CRIS events, when they should have amalgamated into one overall CRIS event.

Action: Open the CRIS event and enter the examination code for the forgotten order and [Save] as normal. Reload the patient using [F9] and you will then be able to right-click the forgotten order and select the link to event option. You can then press [F5] to clear the patient and [F9] to reload the patient to display the now amalgamated event on the patient event list.

This method is also applicable if a duplicate request has already been manually entered via CRIS in addition to a separate order (i.e. in error or during interface downtime) CRIS will allow you to link the events so long as the CRIS event is still unreported and has the same referral details and examination code as the order.

Linking and unlinking will ensure that any events and reciprocal orders are correlated to enable CRIS to receive status updates against the order and transmit updates back to the 3rd party system as required.

Request List - Viewing all rejected requests/orders

The [Request List] allows all requests to be viewed including all rejected/cancelled orders by applying a [Status] filter of RJ= Rejected and ticking [Show Rejected].

Use of episodes with orders

The Interface between CRIS and an Electronic Ordering System allows for inbound information about Episodes into CRIS. Provided the correct XR setting is used (see below in Access settings) then even if Orders have different Episode Value Numbers they can be merged into a single event if required.

It is also possible to move event between episode folders by highlighting the relevant event and clicking the [Move] function button to place an event in an alternative Episode of care.

Electronic Orders Access Settings

XR Settings

The following XR setting are designed for use with the Electronic Ordering. These settings can be applied at XRTR (Trust), XRS (Site) or XRT (Terminal) Level as applicable via Tables > System Tables > XR Settings.

Setting	Description
EVENTLIST.Orders	This setting makes it possible to specify the default columns which will be displayed via the [Orders] list.
OCMS.FiltersOrdersBySite	Use this setting to restrict filters to the current site only.
RECEPT.RefreshOrdersList	This setting is designed to control whether the [Orders] list auto refreshes when the screen is cleared.
GENERAL.CheckGroupWhenCombiningOrders	When linking/combining orders into a single event this setting ensures that all the event information is copied for the first order only, preventing for example, duplication of Clinical history.
GENERAL.SuppressMultiEpisodeWarning	When set to 'Yes', will suppress any warning messages and allow multiple orders with differing 'episode number' to be merged into a single event. This will also be the default behaviour if the setting is blank. Obviously, when set to 'No' the warning message will appear, and the merging will be prevented.

Security Settings

The following security settings are required on conjunction with electronic ordering. Magentus recommend that the Trust create a new Activity Group called MODOCS = Electronic Orders Module. You should then assign MODOCS activities to all relevant ROLES. This can be undertaken via Tables > People > Security Settings.

In this way during a pilot/testing phase of the Electronic Ordering each individual user can just have the MODOCS Activity assigned to their existing User IDs via Staff Tables and [Edit Group]. Then when the Trust/Site are ready to go live with Electronic Ordering Activity MODOCS can be replicated on the Live System and assigned to all relevant Roles to activate this functionality for all appropriate users.

The use of Activities rather than simply adding security settings to each role makes it much easier update the any new security settings which are associated with electronic ordering in future module developments.

Section	Item	Description
GENERAL	CREATE_ORDERS	Create Dummy Orders on CRIS Patients. **Please note:** This setting is only designed to create simulated electronic orders for training purposes.
RECEPTION	LIST_ORDERS	This setting controls access the [Orders] worklist and the ability to view orders via Patient records.
VIEWS	CHANGE_COLUMNS	This setting is required to change the order of worklist tables and columns.
VIEWS	CHANGE_FILTERS	This setting enables users to add column filters to a worklist.