ACCUMEN[°] TECHNOLOGY SOLUTIONS

Product Release Notes

Orders Manager V7 Release 7.6 September 1, 2022

Product Detail and Version

| Product Name | Version | Date | Comment |
|--------------------------|---------|-------------------|---------|
| Orders Management Portal | 7.6 | September 1, 2022 | |

Revision History

| Date | Version | Description | Author |
|-----------|---------|---------------|-----------|
| 9/16/2022 | 1 | Release Notes | Lynn Lund |

Feature Release list contained in Version 7.6

- 1. Filter Managed Scheduled Order Screen by location
- 2. Add the ability to search by order number on the Release Standing Order Screen
- 3. Display Order level comments on the Release Order page
- 4. Add message to password reset screen
- 5. Change Order Date/Time to Collection Date/Time on Manifest report
- 6. Show or hide expired orders as per defined expiration criteria
- 7. Display ordering clinician in New Order & Release Order pages in ascending alphabetical order
- 8. Correction to Collection List PDF display & bill type not updating to requisition when using collection verify
- 9. Set Default Priority to Routine on New Order page
- 10. Correction made for special characters in Diagnosis which prevented an order from being submitted
- 11. Correction made to disallow special characters on release order page preventing submission of an order.
- 12. Modify pop-up message on collection list
- 13. All phone and fax fields modified to format of (XXX) XXX-XXXX

1. Filter Managed Scheduled Order screen by Location

The Managed Scheduled Orders screen has been updated to filter orders in the same manner as the Order Search and Order Release pages. If the user is configured for location filtering this screen will now only display the orders for the location(s) the user is assigned to in the user set-up screen. If the user has order location filtering turned off, the user should be able to view all orders in the queue.

| General | Location | Clinician | Role | Start Page | History | TestFavorite | Printer | | | |
|----------------------|---------------|---------------|-----------|------------|-----------|---------------------------|---------|-----------|-------------|---|
| Username | • | Sampleu | ser1 | | | Active | | | | |
| First Nam | e * | First | | | | Is Suspended | | 9/8/2015 | 11:46:49 AM | |
| Last Nam | e * | Name | | | | Is Locked | | | | |
| E-mail * | | flast@ha | lfpenny.c | om | | Created On | | 7/10/2015 | 11:46:49 AM | |
| Office Pho | one | | | | | Authenticated | On | | | |
| Cell Phon | e * | (617) 20 | 0-5000 | | | Password Set | On | | | |
| | | | | | | Last Login Att | empt | | | |
| | | | | | | Last Login Ip | Address | | | |
| Patient Re Mode * | esult Filter | Location | | • | Pat Mo | tient Order Filte de * | r Loca | tion | • | |
| Is a Clinici | an 🗆 | | | | | | | | | |
| To add a | Clinician, en | ter Clinician | First nam | e or Last | Clinician | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | ✓ Sav | e |

Figure 1- User Admin Configuration Screen – Set to Location Filtering

| U | 5 | rname: | timpanogo | s01 | | | | | | | · · · · · · · · · · · · · · · · · · · | × | | |
|---|---|--|-----------|-------------------------|----------|------------|-----------------------------|--------------|---------|--|---------------------------------------|---|--|--|
| | 0 | General | Location | Clinician | Role | Start Page | History | TestFavorite | Printer | | | | | |
| | | To add a Location, enter Location code or name | | | | | | | | | | | | |
| | | Location | n Code | | | Descriptio | n | | | | | | | |
| | | Loc_00 | 1 Use | er assigned locatior | l to one | order orig | order origin physician locn | | | | | | | |

Figure 2 – Admin User Set-up - Location association screen

| Hor | ne Order * Result * | File Ma | iintenance • | User | Configuration | Data Access * | Reports * | | | | |
|-----|---------------------|-----------|--------------|-------------|---------------|-----------------|-----------|--------------|-------------|----------|--|
| Scl | hedule Order | Sear | ch | | | | | | | | |
| | | | | | | | | | | | |
| Smi | h | | Enter patien | it first na | ime | Enter order nun | nber | | Enter patie | nt code | |
| | From | | | | То | | | | Search | Clear | |
| | Order Number | Patient N | lame | D | ate Of Birth | Order Date * | · · · | Status | | Priority | |
| • | 00338 | Smith, S | ally | 08 | 8/10/1968 | 8/28/2022 12: | 24:00 PM | Scheduled Pa | arent | ROUTINE | |
| • | 00315 | SMITH, | SALLY | 08 | 8/10/1968 | 8/5/2022 8:39 | 00 AM | FutureOrder | | ROUTINE | |
| • | 00298 | SMITH, | SALLY | 08 | 8/10/1968 | 7/15/2022 7:5 | 5:00 AM | FutureOrder | | ROUTINE | |
| • | 00151 | Smith1, | Susan1 | 04 | 4/04/1985 | 11/30/2021 3: | 53:00 PM | Scheduled Pa | arent | STAT | |
| • | 00149 | Smith1, | Susan1 | 04 | 4/04/1985 | 11/30/2021 3:4 | 10:00 PM | FutureOrder | | STAT | |
| • | 00113 | Smith, S | ally | 08 | 8/10/1968 | 6/10/2021 3:3 | 8:00 PM | FutureOrder | | STAT | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

Figure 3 – Managed Scheduled Order Screen – Only orders for user's location LOC_001 to display

2. Add the ability to search by order number on the Standing Order Screen

An additional search criteria option, to be able to filter orders by the order number, has been added to the Release Standing Order Screen.

| Reifease Urder Search Enter patient finit name 00324 Search Clear From To To To To To To Order Number Patient Name Date Of Bith Release Date Status Priority D 00324 LITLE_JOHN 1028/1981 80020222.4602.PM Schwedzel Release ROUTINE To | me Orde | r • Result • | File Maintenance * | User • | Configuratio | n v Data Ac | cess * | Reports * | | | | |
|---|-------------|-----------------|--------------------|------------------|--------------|------------------|--------|-------------------|----------|--------|-------|---------|
| Date of Briting Date of Briting Readers Date of Briting Readers Status Promity Date of Briting Readers Status Promity Date of Briting Readers Date of Briting Readers Status Promity Date of Briting Readers Date of Briting Readers Status Promity Date of Briting Readers Date of Briting Readers Date of Briting Readers Biology Date of Briting Biology Biology | lease | Order Se | earch | | | | | | | | | |
| Teen Image: Teen Status Priority Date of Birth Release Date Status Priority D 00124 LITTLE_JOHN 1028/1961 8/30/2022 2.46.02 PM Schwiduled Release ROUTINE D | ch Enter pa | tient last name | E | nter patient fir | rst name | | 00324 | | | Search | Clear | |
| Oxfor Number Patent Name Date Of Bitm Release Date Status Priority D 00324 LITTLE, JOHN 1029/1991 0.302022 2.4602 PM Scheduler Release ROUTINE ROUTINE | · | T (| 0 | | | | | | | | | |
| LITTLE_JOINN 1028/1991 8/30/2022 2:46:02 PM Scheduled Release ROUTINE | er Number | Patient | Name [| Date Of Birth | F | Release Date | | Status | Priority | | | Done By |
| | 24 | LITTLE. | JOHN 1 | 0/28/1961 | 8 | 8/30/2022 2:46:0 | 02 PM | Scheduled Release | ROUT | INE | | |
| | | | | | | | | | | | | |
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Figure 4 – Release Standing Order screen with order number filtering criteria added

3. Display Order level comments on the Release Order page

Order level comments for an order can originate in two ways. The portal user can type in order level comments on the New Order page of the OM-Portal when placing an order. Orders can also come inbound to the OM-Portal with order level comments via an interface from an EMR. When using the Standard Order release module, a PSC user will now see the order level comments when opening an order for release. These comments will also print on an order requisition when printing from the Order release module.



Figure 5 – New Order screen OM-Portal generated orders with order level comments. Same view above will display in Standard Order Release screen when opening an order.

| | Clinical Informat | ion: | |
|--------------------------------|--|--------------|---|
| Diagnosis: E28.2,K57 | 92 | | |
| Collection Date/Time | : 9/1/2022 3:36:00 PM | | |
| Comments: Test Con Test Con | nment TSH: Call Doctor if below normal Inment CMP: Gold top was drawn first | | |
| Test Code | Test Name | Temperature | c |
| LIPPNL | LIPID PANEL W/REFLEX | REFRIGERATED | |
| | In hours, how long has the natient fasted? 10 | | |

Figure 6 – Order Requisition showing submitted orders with order level comments will print from New Order page and from the Standard Order release module in OM-Portal

4. Add message to password reset screen

When a user performs a password reset within the OM-Portal, they are then taken to a screen that prompts for the entry of an Authentication Code and a New Password/New Password confirmation. It was not previously clear to a user that the Authentication Code is sent via email to the email address that is associated with their user account in the application. A message has now been added to indicate the Authentication Code will be sent to their email address.

Forgotten Password Authentication

| | | Password must contain one or more lowercase character. |
|------|---------------------------------|---|
| | Authentication Code | Password must contain one or more uppercase character. Password must contain one or more numeric character. |
| | New Password | Password must contain one or more special character. |
| | | Password minimum length = 8. |
| | Retype New Password | Password maximum length = 100. |
| | Submit Cancel | Limit to how many times a character can be repeated in sequence = 2. |
| | | |
| Note | :- Please check your email addr | ress for an authentication code that will expire in 2 days. |

Figure 7 – New message on forgot password authentication screen indicating authentication code will arrive via email to user's email address and will expire in 2 days

5. Change Order Date/Time to Collection Date/Time on Manifest report

A modification has been made to the column previously labeled as Order date/time on the manifest report. The Collection date/time is now displayed as the column header and contains the values associated with the collection date/time for all orders on the report.

| Print Mar | ifest Report | | | | | | | | | | • × |
|-----------------------------|--|--------------------------------------|-----------------|---|---|---|-----------------------------|-------|---|---|-----|
| ≡ G | enerateManife | stReport | 1 / 1 | | 65% + | 1 🗉 🔊 | | | ŧ | ē | : |
| Billing Manifest | | | Page 1 of 1 | | | | | | | | |
| Account #: Account Name: | Account9 Account9 | | | | | Print Date: 09/02/21 Collection Date: 9/1/2022 | 22 14:22:02 2 8:19:00 AM | | | | |
| Ordering Physician | Patient Name | Patient DOB | Patient ID | Requisition # | Collection Date/Time | Insurance | Bill Type | Notes | | - | |
| LEE Doctor | TESTTERRY SIGGY | 12/7/1994 | | O191587CE1229 | 9/1/2022 8:19:00 AM | MEDICARE PART A | HealthPlan | | | | |
| | Test Code LIPPNL | Test Name LIPID PANEL WIT | NEPLEX | CPT4 Codes 83700.83701, 83204.80051 | Performing Lab Chemistry | 100 | | | | | |
| | CBCA | OBC WIDEF | | 85025,85027, 85004 | Testdescription | | | | | | |
| LEE Doctor | TESTTERRY SIGGY | 12/7/1994 | 143095 | O191587CE1229 | 9/1/2022 3:36:00 PM | MEDICARE PART A | HealthPlan | | | | |
| | Test Code LIPPIN | Test Name LIPID PANEL WIT | REFLEX | CPT4 Codes 83700.83701, 83704.80051 | Performing Lab Chemistry | AND 8 | | | | | |
| | CBCA | OBC WIDEF | | 85025,85027, 85004 | Testdescription | | | | | | |
| LEE Doctor | TestTerry Michigan Test Code PTINR | 100/1929 Test Name PROTHROMBIN | 12304787 TME | 11000 CPT4 Codes | 9/12022 4:14:00 PM Performing Lab Testdescription | No Insurance | Client | | | | |
| LEE Doctor | TestTerry Michigan Test Code PTINR | 100/1939 Test Name PROTHROMBIN | 12304787 TME | 000 CPT4 Codes | 9/12022 4:39:00 PM Performing Lab Testdescription | No Insurance | Client | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

Figure 8 – Manifest report of all patient orders with collection date/time for 9/1/2022 for one location

6. Show or hide expired orders as per defined expiration criteria

The OM-Portal application contains a configuration setting allowing for the hospital or lab customer to be able to control the timeframe to set for the expiration of orders. Changes have been put in place to determine how each of the order screens behave in relation to the status of an order. The following outlines how each screen behaves:

All Order search/Order search – displays expired orders

Manage Scheduled Orders - displays expired orders

Release Standing Orders - hides expired orders, only orders with a status of Scheduled Standing orders should display

Release Order - hides expired orders, only orders with a status of pending release will be available on the screen

New Collection List - hides expired orders, only orders with a status of Scheduled release will be available

7. Display ordering clinician in New Order & Release Order pages in ascending alphabetical order

When there are multiple clinicians associated to one account the New Order Page and the Standard Release Order page will now display the clinician names in alphabetical order by last name.

| Order Date * Collection Date Account * Ordering Clinician * PSC Hold | 09/04/2022 13:10 09/04/2022 13:10 Account two for testing Enter last, first name or BROWN, Doctor COOK, Doctor MARTIN, Doctor PEREZ, Doctor | | Priority = Entered By Collector Name Bill Type = Comments | Routine Isobel Isobel HealthPlan | | | |
|--|--|--|---|---|--|--|--|
|--|--|--|---|---|--|--|--|

Figure 9 – New Order Page display of clinicians associated to one account in alphabetical order.



Figure 10 – Standard Release Order Page display of clinicians associated to one account in alphabetical order.

8. Correction to Collection List PDF display & bill type not updating to requisition when using collection Verify function

The Collection list functionality is a global portal setting in the OM-Portal and controls when future or standing orders are transmitted. The hospital or lab customer will make the decision to either utilize this functionality or turn it off for their portal. If the setting is "on" future or standing orders will transmit when a collection list is released.

When using the collection list functionality within OM-Portal, the user would initially enter the future/standing orders that will need to appear on the collection list. A collection list is then able to be created for any location(s) the user is linked to in the admin user screen. It was reported that the PDF for the collection list was not generating consistently and when the bill type was changed from the Verify screen the Order Requisition did not display the new bill type selected. Both the PDF generation and the bill type edit have been resolved in this release.



Figure 11 – Generation of "New Collection List" with patient orders to be drawn.

| Client: Accou | nt9 | | | | PePortal | |
|-------------------------|---------------|------------------------------|------------|----------------------------|-----------------------------|------------|
| Patient Name | Patient Id | Gender | DOB | Room | Order Number | Order Date |
| New York Test | NYT0939 | м | 03/03/1934 | | 11727 | 09/05/2022 |
| Test Name TSH3G-RFLX | Desc TSH v | ription vith Reflex to Fr | Conta | iner nedium,lithiumhepa | Temperature REFRIGERATED | |

Figure 12 – Printable Collection List PDF generated to the screen with patient orders to be drawn.

| Verit | y Co | llection | List | | | | | | | | | × | |
|-------|------------------------|----------------------|------------|---------|---------------------|----------|-------------|---------------------|----------------|-----------|------------|--------|--|
| Ve | Verify Collection List | | | | | | | | | | | | |
| Colle | cted | by | Isobel | | | | • | GenerateLabel | | | | | |
| Rem | ove C | hecked fr | om List | | | | | | | | | | |
| | | Patient | Patient ID | Order # | Collection Date | | Done By | | Bill Type | | Label Cour | nt | |
| • | • | Test, New York | NYT0939 | | 9/5/2022 1:33:33 PM | 0 | Isobel | | HealthPlan | • | 1 | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | - | |
| | | | | | | Re | Print Requi | isitions Re-Print C | ollection List | Submit Co | ollection | Cancel | |

Figure 13 – Verify Collection List – edit Bill type from "Self-Pay" to "Healthplan" prior to Submitting Collection list.

| | | 11727 | Routine |
|---------------------------------|------------------------------------|------------------------------|----------------|
| Client: | Account9 | | "FePortal" |
| Provider: | LEE, Doctor m | | San diego, CA |
| Provider Code Add'l provider | :: 4853707422 | | (888) 888-8888 |
| | | Patient Information: | |
| Patient Name: | Test, New York | DOB: 03/03/1934 | Sex: M |
| PID: | NYT0939 | Room: | Bed: |
| Patient Addre | ss: 100 Main New York, NY 10001 | Wing: Bill To: HealthPlan | |
| Patient Phone | | | |
| Entered By: | Isobel | | |
| | | Insurance Details: | |
| Guarantor: | Test, New York | DOB: 03/03/1934 | |
| Guarantor Ad | dress: 100 Main | Relationship: | |
| | New York, NY 10001 | | |

Figure 14 – Verify Collection List – Re-print of Order Requisition after Bill Type edit. "Bill To" changed from "Self-Pay" to "Healthplan."

9. Set Default Priority to Routine on New Order page

The default priority on the New Order page was changed to "Routine" to represent the majority of how users typically enter information.

| GENERAL | | | | | | |
|----------------------|------------------------|------------|----------------|------------------|---|--|
| Order Date * | 09/06/2022 19:22 | m • | Priority • | Routine | • | |
| Collection Date | 09/06/2022 19:22 | m • | Entered By | Isobel | | |
| Account * | Select account | • | Collector Name | Isobel | | |
| Ordering Clinician * | Enter last, first name | or NPI 💌 | Bill Type * | Select Bill Type | * | |
| PSC Hold | | | Comments | | | |
| | | | | | | |
| | | | | | | |
| | | | | | 4 | |

Figure 15 – Priority field for New Order screen changed to default to "Routine".

10. Correction made for special characters in Diagnosis description field which prevented an order from being submitted in the New Order Page

A correction was made to resolve a reported issue in the New Order Screen "diagnosis section" regarding special characters in the diagnosis description field.

When attempting to submit an order if a special character (i.e. ">" "<") was populated in the diagnosis description the order could not be submitted. The OM-Portal has been updated to allow order release with special characters in the diagnosis description field.

| Enter diagnosis con | e or name | |
|---------------------|--|--|
| Code | Description | |
| Z68.54 | Body mass index pediatric, > or equal to 95% for age | |

Figure 16 – ICD-10 load of data corrected to allow special characters in the diagnosis description field.

11. Correction made to disallow special characters to be saved in free text fields on the New Order and Release order page.

Should a user enter a special character in any field, when they select "submit" they will be prompted with an error that lets them know what field is incorrectly entered. The field will also be highlighted in RED.



Figure 17 – When a user enters special characters on New Order Page and attempts to "Submit" they will be prompted with an error and directed back to the field to correct the data.

| Standa | ard Release | e Order Te | stTerry Fut01 07-11-19 | 90 | _ | | × |
|--------|-------------|------------|------------------------|------------------------|--------------|---|--------|
| | PATIENT | GENERAL | PRIMARY HEALTHPLA | N SECONDARY HEALTHPLAN | GUARANTO | | |
| | Group Nan | 10 | | Street 1 | %%% | SERVICE_ERROR: Please enter a valid stre | et 1 |
| | Plan Code | | | Street 2 | | | |
| | Effective D | ate | Ē | City | | | |
| | Expiration | Date | | State | Select state | | |
| | | | | Zip | | | |
| | | | | Home Phone | | | |
| | | | | Cell Phone | | | |
| | | | | Employer | | | |
| | | | | | | | |
| Г | SECOND | ARY HEAL | THPLAN | | | | - I |
| | | | | | | | |
| | | | | Add HealthPlan | | | |
| | | | | | | | |
| | | | | | | Release Order | Cancel |

Figure 18 – When a user enters special characters on the Standard Order Release page and attempts to "Release" the order they will be prompted with an error and directed back to the field to correct the data.

12. Modify pop-up message on "New" collection list creation

When a user initially creates a "New" Collection list a pop-up message indicates the collection list has successfully been created. The popup message has been modified to appear as below.



13. All phone and fax fields modified to format of (XXX) XXX-XXXX

All screens that include home phone number, work phone number, mobile phone number and Fax number fields have been validated to be in the required phone number format for the OM-Portal of (XXX) XXX-XXXX. The screens are noted below:

New Order Screen - Patient Section/Home Phone/Work Phone/Cell Phone fields

Patient Management Screen - Patient Section/Home Phone/Work Phone/Cell Phone fields

Standard Release Order Screen - Patient Section/Home Phone/Work Phone/Cell Phone fields

File Maintenance Screens – All Contact Method Tabs on the Location/Clinician/Department/Healthplan screens for Phone 1, Phone 2, & Mobile phone fields

| PATIENT GENERAL | PRIMARY HEALTI | IPLAN | SECONDARY HEALTHPLAN GUAR | ANTOR DIAGNOSI | | |
|--------------------|----------------|-------|---------------------------|-----------------|---|---|
| First Name * | Echo | | Street 2 | | | |
| Middle Name | | | City | St George | | |
| DOB • | 03/12/1938 | | State | Utah | ٠ | |
| Name Suffix | | | Zip | 84094 | | |
| Gender * | Male | • | Home Phone | (333) 333-3333 | | |
| Maiden Name | Unmarried | | Additional Patient ID | | | |
| Race | Select Race | • | Cell Phone | (222) 222-2222 | | |
| SSN | XXX-XX-9999 | | Work Phone | (444) 444-4444 | | |
| Billing Number | | | Email | email@email.com | | |
| Patient ID * | ECH9102 | | Military Status | Select One | ٠ | |
| Patient Location * | Account9 | • | | | | |
| Floor | | | | | | L |



| General Clinician Bri | dge Settings History | | | | | |
|------------------------|----------------------|--------|----------|--|--|--|
| Location Code * | Location6 | | | | | |
| Description * | on * Location6 | | | | | |
| Practice | Select Practice 🔻 | | | | | |
| Active | ×. | | | | | |
| Enable PSC Hold | | | | | | |
| PSC Hold Default Value | | | | | | |
| Address Contact Me | thod | | | | | |
| Phone1 | (544) 999-3333 | | | | | |
| Phone2 | (899) 020-2022 | | | | | |
| MobilePhone | (443) 020-9292 | | | | | |
| E-mail | | | | | | |
| Fax | (445) 998-8777 | | | | | |
| | | ✓ Save | O Cancel | | | |

Figure 21 – Example File Maintenance Location Screen – Contact Method Tab – Phone 1, Phone 2, Mobile Phone and Fax fields updated for consistent format.

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