

Optimizing Lab and Referral Workflows

(aka Captain Config and mistEHR unleash their superhero moves)

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Session Goals

1. Walk through PCC suggested workflows
2. Learn how we can utilize tasking and “fake” users
3. Revisit your current workflows

In Office Labs (Ordered by Nurse/MA)

- The *Nurse / MA* orders the lab
- The *nurse / MA* runs the test

In Office Labs (Ordered by Nurse/MA)

- The *nurse / MA* enters the results
- The *nurse / MA* changes the visit status on the Schedule screen to **Results Ready**

In Office Labs (Ordered by Provider)

- The *provider* orders the lab and assigns it to the *Nurse / MA* user
- The *nurse / MA* runs the test

In Office Labs (Ordered by Provider)

- The *nurse / MA* enters the results
- The *nurse / MA* changes the visit status on Schedule screen to **Results Ready**

Overnight Labs (Ordered by Nurse/MA)

- The *nurse / MA* orders the lab
- The *nurse / MA* prepares the specimen

Overnight Labs (Ordered by Nurse/MA)

- The *nurse / MA* assigns the lab order to the **Overnight Lab** user
- The *nurse / MA* changes the order due date to the next day

Overnight Labs (Ordered by Provider)

- The *provider* orders the lab
- The *provider* clicks the **Add Task** button

Overnight Labs (Ordered by Provider)

- The *provider* chooses the task type **Prepare Specimen** and assigns the task to the *Nurse / MA* user
- The *nurse / MA* prepares the specimen and checks the **Task Completed** checkbox for the **Prepare Specimen** task

Overnight Labs (Ordered by Provider)

- The *nurse / MA* assigns the lab order to the *Overnight Lab* user
- The *nurse / MA* changes the order due date to the next day

Overnight Labs (Entering Results)

1. The *nurse / MA* navigates to the **Visit Task queue** and chooses **Overnight Lab** in the Assigned User drop down
2. The *nurse / MA* opens the task and enters the result
3. The *nurse / MA* clicks the **Signature Required** checkbox
4. The *provider* views the result on the **Signing queue**, signs the result, and creates follow up tasks if needed

Send Out Lab Orders

- The *provider* orders a lab during visit or phone note
- The *provider* chooses a lab facility
- **If the specimen is collected in-office:**
 - The *provider* chooses the task type **Collect Specimen** and assigns the task to the Nurse/MA user

Send Out Lab Orders

- The *Nurse/MA* collects the specimen, prints the lab requisition and clicks **Task Completed**
- The *Nurse/MA* clicks the **Add Task** button
- The *Nurse/MA* chooses the task type **Results Needed** and assigns the task to the *Pending Lab* user

Send Out Lab Orders

- **If the specimen is not collected in-office:**
 - The *provider* chooses the task type **Requisition Needed** and assigns the task to the *Nurse/MA* user
 - The *Nurse/MA* prints the lab requisition and clicks **Task Completed** on their task
 - The *Nurse/MA* verifies the lab facility

Send Out Lab Orders

- The *Nurse/MA* clicks the **Add Task** button
- The *Nurse/MA* chooses task type **Results Needed** and assigns to *Pending Lab*

Ordering a Referral

- The *provider* orders the referral during a visit or phone note
- The *provider* types information about the referral into the **Results** box (eg: ICD10 code, reason for referral, timeframe for referral)

Ordering a Referral

- The *provider* chooses the task type **Referral Needed** and assigns the task to the *Referral Coordinator* user
- The *Referral Coordinator* generates a referral form and any other needed documentation
- The *Referral Coordinator* tracks notes in notes box for their task and clicks the **Tasks Completed** checkbox

Ordering a Referral

- The *Referral Coordinator* clicks the **Add Task** button
- *Referral Coordinator* chooses the task type **Confirm Outcome** and assigns the task to the *Pending Referral* user. If an appointment for the referral was made by the office, set the due date for this task to a week after the appointment date.

Importing Results (Referral)

- Find the result in the **Import Documents** tool
- Attach the result to the patient
- Choose the **File as Unattached Document** option, filling in the date of the consult

Importing Results (Referral)

- Choose the ordering provider's name from the **Needs to be Signed by Provider** drop down
- Save the result, and close the **Import Documents** tool
- From the schedule screen, choose the patient from the drop down list in the **patient finder** to open the patient's chart

Importing Results (Referral)

- In the **Outstanding Tasks** component, double-click the referral order to open it
- Mark the **Pending Referral** task as completed
- The *provider* finds the result on **Signing queue**, creates a follow up task if needed and clicks **Sign**

Session Takeaways

1. Learning current PCC workflows for labs and referrals
2. Revisit your current workflows with staff and verify they are still efficient
3. Utilize fake users when tasking (“Pending Lab”, “Referral Pending”, etc)

References



1. <https://learn.pcc.com/help/in-office-lab-workflow/>
2. <https://learn.pcc.com/help/referral-workflow/>
3. <https://learn.pcc.com/help/send-out-lab-workflow/>

What Questions Do You Have?

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