Orders Workflow Guide

April 2021

Overview

The system automatically creates orders as described in this document, and agencies manage them through a series of dashboards that guide users through the tasks required to complete orders.

Plan of Care (PoC)

The Plan of Care is created at Intake for case types that require a Plan of Care. While the Plan of Care is in Draft status, any additional orders, regardless of author or provider, are included on the Plan of Care order.

Supplemental Orders

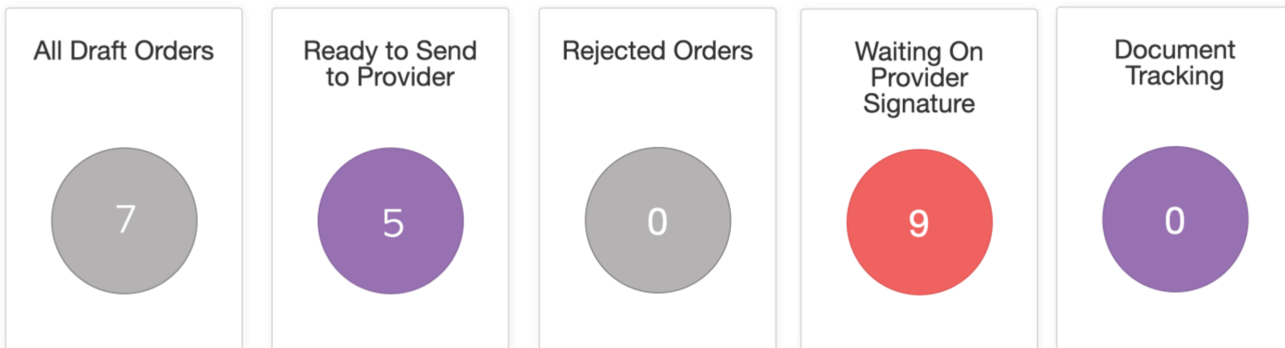
When there is no open Plan of Care, the system automatically generates orders when a clinician creates orderables (medications or services), either through charting documents or tabs in the patient record.

- **Examples of tabs with orderables:**
  - Medications
  - Care Plan
- **Examples of charting documents with orderables:**
  - Any charting document with a Medications page
  - Any charting document with a Care Plan page

Dashboards that show order information

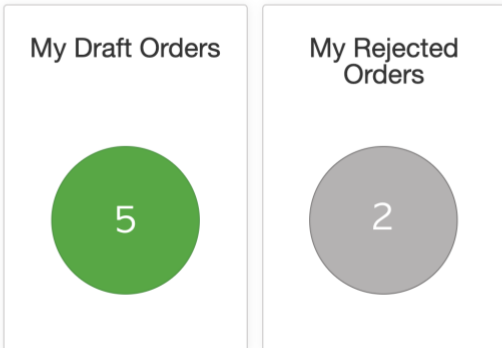
Agencies manage orders through a series of dashboards that guide users through the tasks required to complete orders.

Clinical Admin Order Dashboard Tiles



All Draft Orders	Shows all orders that are in Draft status. Orders that do not have an author listed are template orders created at Intake.
Ready to send to provider	Shows all orders that the clinician has signed. • Ready to send to provider dashboard gives admin the opportunity to review orders before sending to a provider for signature. • Orders that need editing before sending to the provider can be rejected and reordered with notes to the clinician regarding items that need modification. The Reject and Reorder process sends the order back to the clinician's My Draft Orders dashboard to correct and re-sign
Rejected Orders	Shows all orders that have a rejected status and were not reordered. Tip: If a clinician entered an order by mistake, use the Bypass Order function and mark it as entered in error or a duplicate. Bypassed orders that indicate they were duplicated or entered in error do not appear on the Rejected Orders dashboard.
Waiting on Provider Signature	Shows orders sent to a provider and waiting in Forcura for a provider signature.
Document Tracking	Lists orders sent in the last 30 days.

Clinician Order Dashboard Tiles



My Draft Orders

Shows all orders the clinician started.

- Orders in the dashboard need to be addressed by the clinician:
  - Review orders for accuracy and fill in any required fields (payer plan, provider, etc.)
  - Mark as verbal if appropriate
  - Sign Order (this sends the order to the Ready to Send admin dashboard for review and potential to be sent back to the provider)
- When an order in this dashboard is marked Reorder, it means QA reviewed the order and requests changes. Review any notes from the QA team and make changes as appropriate.

If service orders, meds, or care plan content need to be updated, navigate to tabs, update pertinent information, then return to the PoC to view updated information. Proceed with signing to push the order back to the Ready to Send to Provider dashboard for review.

My Rejected Orders

Shows a clinician's orders that were rejected and not reordered.

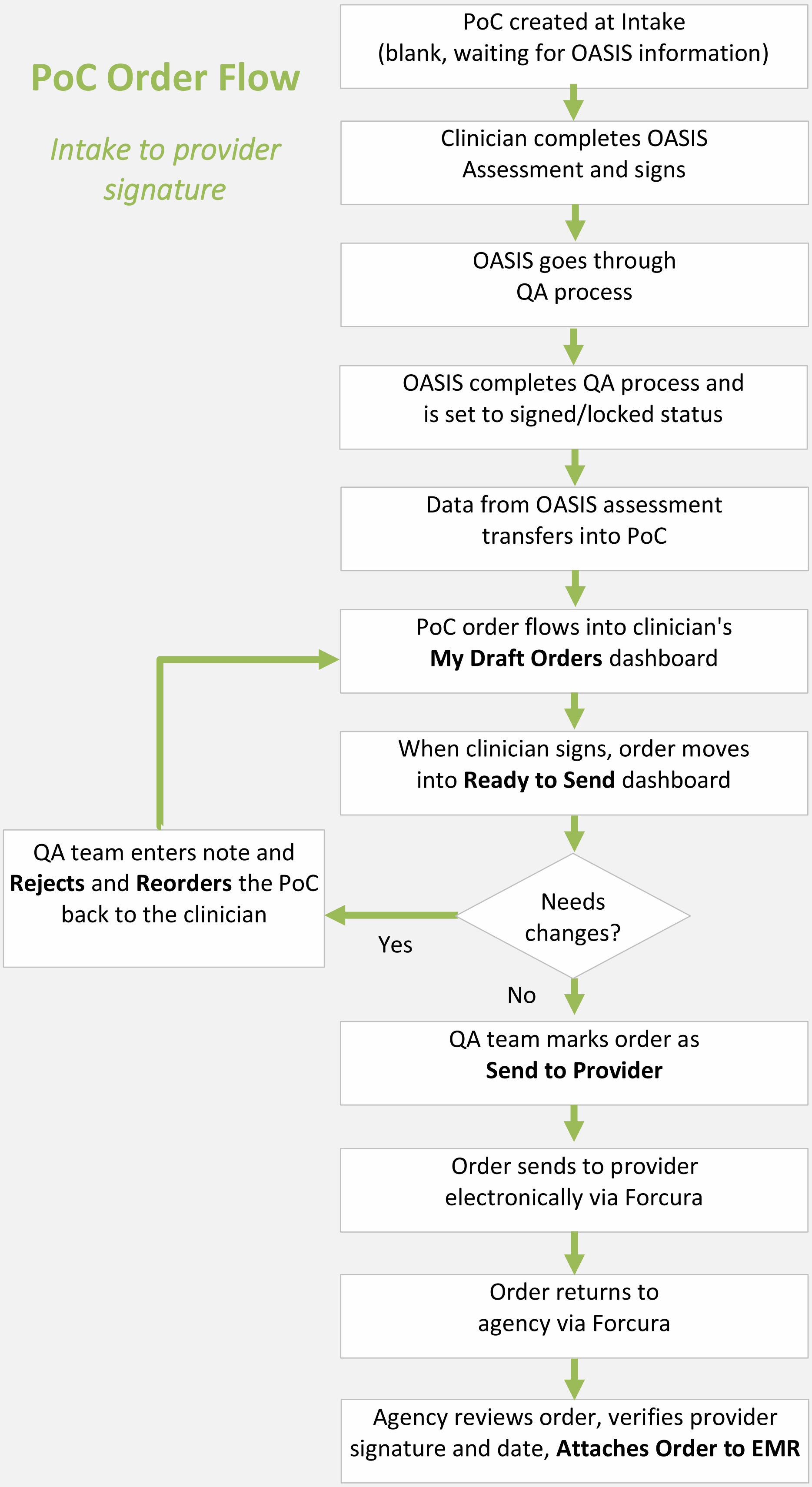
Orders in this dashboard are marked as rejected for any number of reasons.

Tip: If a clinician entered an order by mistake, use the Bypass function and indicate it was entered in error or duplicated. This stops the order from appearing in the Rejected Orders dashboard. For more information on the Bypass order functionality, see the Bypass orders section.

Order Flow

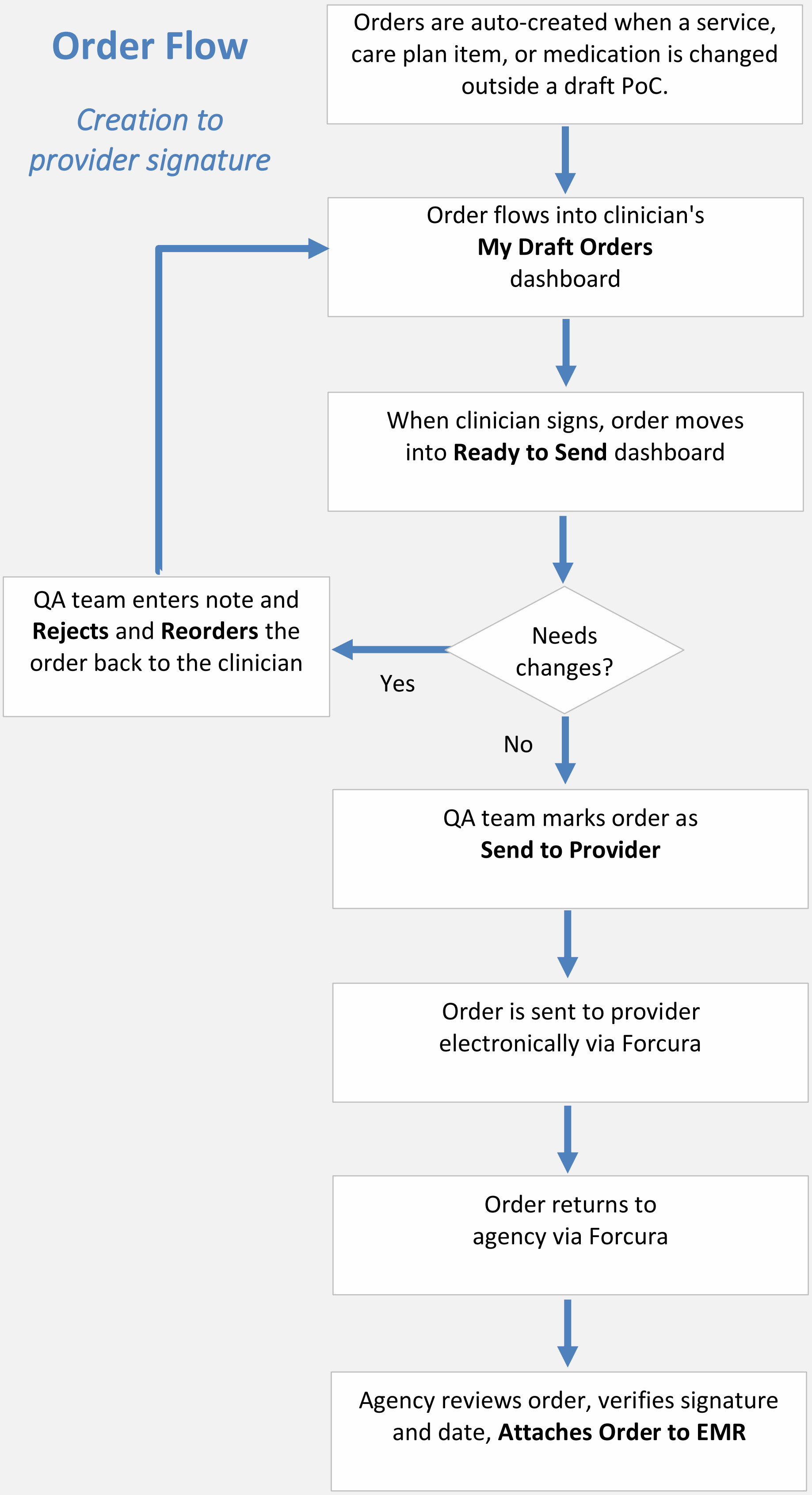
PoC Order Flow

Intake to provider signature



Order Flow

Creation to provider signature



Working with Orders

Definitions

Draft	Order is created but not yet signed by the clinician. **Tip:** While a Plan of Care is in Draft status, all other orders flow into the Plan of Care.
Pending (Ready to Send)	The clinician has signed the order, and it is waiting for QA staff or Admin to Send to Provider.
Pending (Sent to Provider)	Order is faxed to provider and is awaiting signature.
Signed	Order signed by the provider.
Bypass	Order does not need to be sent to the provider for signature and will bypass the process.
Rejected	Order needs correction. (If an order is invalid, use the Bypass option.) When you reorder the items, a copy of the rejected order is created in draft status for the clinician to edit and sign. Be sure to include notes to the clinician regarding changes required.
Tracking State (from Forcura)	Pending Upload - The order is queued for upload to Forcura. Pending Fax - The order was successfully uploaded into Forcura and is queued for fax transmission. Sent - The order has been successfully sent and uploaded into Forcura Sent (Not Faxed) - The provider's preferred delivery method is set to something other than Fax. The order was transmitted to Forcura, but it was NOT faxed. Sent (Not Faxed - Branch Setup) - The order was sent to Forcura, and a case was created, but the fax transmission was unsuccessful due to no fax group listed on the branch associated with the patient's case record Signed - The order has been signed by the provider and sent back to PointClickCare

	Rejected - The order has been rejected by the provider and sent back to PointClickCare. Failed Upload - The order failed to upload into Forcura. Failed Fax - The order was successfully uploaded into Forcura but failed to fax automatically.

Order Actions

Move from Draft to Pending status (Ready to Send)	Select the order from the My Draft Dashboard list. Review the order, mark **Verbal** order if applicable, make edits as necessary, and **Sign**. After signing, the order is moved to the Pending section with a status of Ready to Send. **Tip:** Orders can no longer be changed once moved to the Pending list. If changes are needed, follow the Reject and Reorder process.
Mark as Send to Provider	1. From the Ready to Send to Provider dashboard, select the order from the list. 2. QA or review the order for accuracy. If changes are needed, follow the Reject and Reorder process. 3. Mark the order **Send to Provider**. 4. Enter the **Send Date** and click **Send**.
Reject and reorder an order	You can reject an order when it is in either the **Pending Ready to Send to Provider** or **Pending Sent to Provider** status. On from the Pending tab, select **Reject.** Reject indicates an order needs correction. (If an order is invalid, use the Bypass option.) When you reorder the items, a copy of the rejected order is created in draft status for the clinician to edit and sign. **Note:** Be sure to include notes to the clinician regarding changes required.
Void an ordered item on a Draft order	Navigate to the Draft orders list and open the order. Click **Void** for the specific item and verify that you want to void the item. **Note:** Voiding an item is a permanent process and should be used only in the event of an error. If you want to discontinue an item, use the Discontinuation option on the medication, intervention, or service tabs.

Add verbal order information	**For Draft orders** From a Draft order, check the **Verbal Received** checkbox and enter details. **Or** From the Draft orders list, click **Add** under the **Verbal** column and enter the Verbal Order Information. **For Pending orders** From the Pending list, click **Add** under the **Verbal** column.
Add or view a comment	**Adding comments** From any of the Orders lists, click **Add** from the Comments column or click the **Comments** icon to add more comments. Enter comments and click **Done**. **Viewing comments** Select the **Comments** icon from any of the Order lists or view comments when selecting an action.
Mark as signed by provider	From Forcura, select the order to be updated and click **Attach to EMR**. Enter the **Physician Signature date, e**nter the **Signed Date,** and click **Sign**. **Tips:** • Orders signed by the provider move to the Signed list and are no longer visible on any dashboard. • If the order does not have a verbal order indication, the system uses the Provider Signed Date as the Order Effective Date. • You can select the Signed section of the Orders table and view the signed order.
Bypass sending to provider	Setting an order to Bypass status stops an order from going through the provider signature process. Bypass is useful when transcribing a signed order from the provider, when orders are entered in error, for F2F encounters, when an order is duplicated, and when an order is for information only. 1. Go to the **Orders** tab in the patient's record. 2. From the Draft or Pending Orders section, select **Bypass Sending Order** from **Actions.** 3. Select the **Reason for Bypass.**

	Tips: • Bypassed order information is available on audit reports. • Admission, F2F, and transcribed orders all go automatically into Signed status. • Duplication, entered in error, case discharged, included on plan of care, informational only, and NTUC go into Other status. These order types are archived and are available in reports for audit purposes.
Resend an order to Forcura	1. Go to the **Orders** tab for the patient. 2. Select the **Pending** tab. 3. In the **Tracking State** column, click **Send Again.** The system will resubmit the order to Forcura
Add services, medications, and interventions to an existing order	1. Either from the assessment or web, add a service, medicine, or intervention. 2. On the order, click **Add Items to this order** and select the items you want to add to the order. 3. When you have selected all items, click **Add Items**.
Edit the Certification Period on a Draft Plan of Care **(Admin only)**	1. From the **Orders** tab in the patient's record, select a **Draft Plan of Care.** 2. If the user has admin rights, the **Edit** link will display next to the certification period. Click **Edit**. 3. Select any active certification period from the patient's record. The system will validate that the payer is active for the selected certification period. This avoids selecting an inactive payer and the resulting incorrect provider certification statement or face-to-face encounter.
Manually generate a draft plan of care	The system automatically creates draft PoC orders at Intake. Manually generating a draft PoC might be helpful if a signed PoC is inaccurate, and you need to generate a new one. **Tip:** If you find a PoC is inaccurate before it is signed, the best practice is to use the Reject and Reorder process. 1. From the **Orders** tab in the patient's record, select the **Generate Plan of Care.** 3. Select a **Certification Period** and click **Accept.**

Order Type Summary

Plan of Care Order	The system automatically creates a Plan of Care at Intake for case types that require one. While the Plan of Care is in Draft status, any additional orders, regardless of author or provider, are included on the Plan of Care order.
Generic Supplemental Orders	Supplemental Orders automatically generate when clinicians enter new orders outside of a Plan of Care order. For example, the system creates Supplemental Orders from the Medications pages and Skilled Services pages in skilled visit notes, and Medications and Care Plan tabs in the patient's chart. For new medications to auto-generate an order, do NOT check the Per RX box. Follow agency procedures for sending medication orders to providers. **From an assessment** Enter a service, intervention, or medication. Complete the assessment and click **Sign**. **Tip:** You can sign assessments on the mobile application or web. **From the patient case record** From the patient's Medications, Services, or Care Plan tab, create a service, add/update an intervention, or add/update a medication. Click **Save/Accept**. **Tip:** Supplemental Orders are created based on the author and provider. If two authors are creating orders for the same provider, then two Supplemental Orders are created. If one author is creating order items for two providers, then two Supplemental Orders are created.
Manual order	1. On the **Orders** tab, click **Create Order**. 2. Select the **Order Type.** Manual Orders can be: • Admission Order • Face to Face Encounter • Hold Orders • Resumption of Care Orders (Resume) • Discharge Orders • Other Types 3. Select the order items to include and click **Add Items**.
F2F encounter	The F2F encounter statement notifies the system that you have obtained a F2F. It is not technically an order, and you do not send it to the provider. Consider

	the F2F encounter document as a tracking tool. Note that some payers require a F2F for billing. 1. On the **Orders** tab, click **Create Order**. 2. Select **F2F** from the **Order Type** list. 3. Be sure to enter the **Encounter Date**. (Not required, but necessary for compliance.) 4. Follow your agency's process for sending to the provider or bypassing the signature process. If you are using the **Bypass Sending Order** for signature process, select **F2F only** as the reason. This places the F2F document in a Signed status to meet the Claims Console requirements. **Tips:** • F2F encounter information flows into an open PoC. With Admin user privileges, you can configure the information that flows into the PoC on a Payer/Plan basis. • If you do not have the F2F Encounter Date, you can create the order and place it in draft status until you receive the date. The best practice is to enter a note that you sent a F2F encounter request to the provider. • The F2F order is not a blank template that you can send to providers. You can create a blank F2F order template from Forcura.
Admission order	1. From the Orders tab, click **Create Order** and select **Order Type: Admission.** 2. In the **Notes to Provider** field, enter admission information. 3. If applicable, mark the order as **Verbal**. 4. **Sign** the Admission order. 5. Follow your agency's process for sending to the provider or bypassing the signature process. If you are using the **Bypass Sending Order** for signature process, select **Admission Order** as the reason. This places the Admission Order in a Signed status to meet the Claims Console requirements. Tips: No-pay RAPs require Admission orders.

Useful reports for auditing orders

The system offers several valuable reports for auditing orders.

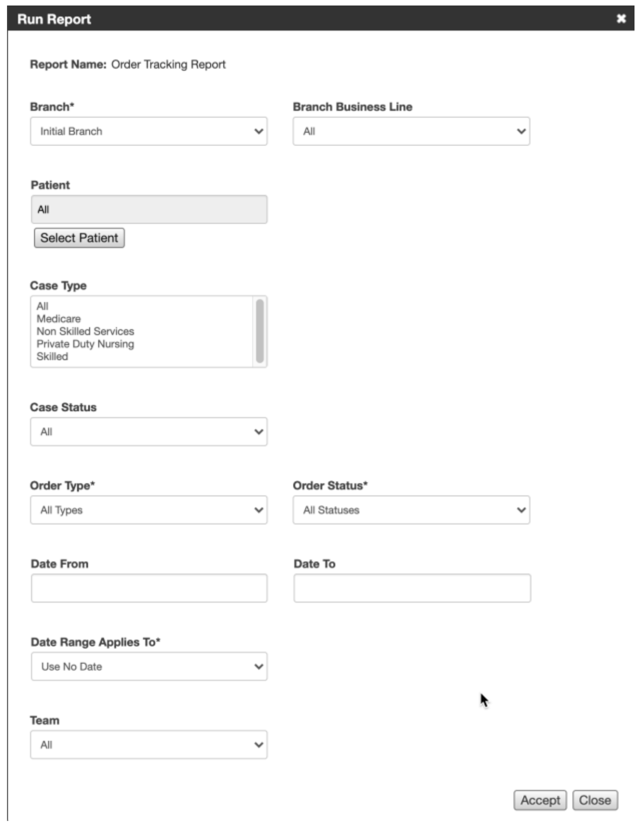
Order Tracking Report

The Order Tracking Report shows all orders based on selected filters.

Report Fields

- Ent ID
- Order ID
- Patient Name
- Branch
- Branch Business Line
- Case Type
- Case Status
- Team
- SOC Date
- Discharge Date
- Order Created Date
- Order Authored By
- Cert Start
- Cert End
- Orders Type
- Order Status
- Bypass Sending Order By
- Bypass Sending Order Date
- Bypass Sending Order Reason
- Verbal Order Date
- Clinician Signed
- Clinician Sign Date
- Cosigner
- Cosigner Sign Date
- Days to Clinician Signed
- Sent Electronically
- Sent Date
- Days To Sent
- Provider Response Date
- Days to Provider Response
- Provider
- Provider Phone
- Provider Fax
- Provider NPI
- Provider Notes
- Order Comments

Filter Options



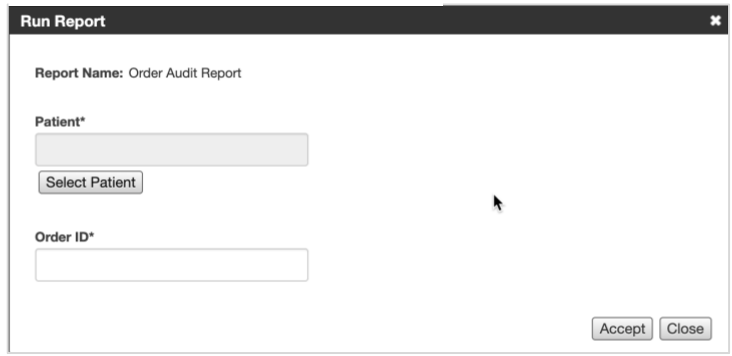
Order Audit Report

The Order Audit Report shows the history of a selected order for a patient. You can run this report from the Report tab or a link in the Patient's Order table.

Fields

- Order Type
- Action Date/Time
- User
- Action

Filter Options



Order Item Report

The Order Item Report lists the ordered items for a selected patient.

Fields

- Ordered Item Type
- Ordered Item
- Ordered Item ID
- Create Date
- Created By
- Start Date
- Last Updated By
- Last Updated Date
- Ended By
- End Date
- Verbal Order Date
- Provider
- Associated Order IDs

Filter Options