Orchard® Copia® Springboards Rice Memorial Hospital's Outreach

After ten years with an LIS that could not accommodate the growing needs of the prominent outreach program at Rice Memorial Hospital, the laboratory staff decided it was time for a change. In 2004, Rice began a partnership with Orchard Software to support their 136-bed hospital and numerous external laboratory clients using the true integrated laboratory network of Orchard Harvest™ LIS and Orchard Copia.

The administration of Rice Memorial Hospital acknowledged the laboratory's excellence during the 4th quarter of 2006. When compared to more than 900 hospitals nationwide, the laboratory ranked in the 99th percentile for service excellence in patient satisfaction survey scores for all four quarters in 2006.

Built in 1937, Rice Memorial Hospital has grown into a large multi-specialty regional referral center. The lab processes 350,000 clinical samples, 13,000 surgical specimens, and 28,000 cytology specimens annually. Rice's laboratory acquires half of its volume from external clients. The varied types of outreach clients Rice services include other hospitals, physician office labs, specialty clinics, nursing homes, dental offices, and veterinary offices.

Rice has been able to use Copia as a marketing tool to gain additional outreach business. "A lot of our competitors require a facility to generate a certain volume in order to have electronic ordering/result retrieval access of their lab work," said LaDonna Hebrink, Co-LIS Administrator. "We do not. We give them the option of using Copia from the very beginning."

Of the 35-40 other facilities that use Rice for their laboratory needs, approximately 15-20 use Copia to place orders and retrieve results. The extensive network of varying clients that Rice services made it necessary to utilize a product that could accommodate many unrelated customers. Currently, Orchard provides two web-based outreach solutions. Harvest LIS Webstation provides remote order entry and result retrieval for a single business entity using a one-laboratory database. For laboratories serving multiple business entities or numerous labs and draw locations, Orchard offers Copia. "The primary reason we went with Copia as opposed to Webstation was due to Copia's ability to customize security at the practice level," said LaDonna. "Because all of our clients are individual entities, it is imperative that one practice not be able to access another practice's patient data."

The implementation of Copia as their outreach solution has significantly saved them time and resources. "We have definitely grown our business and not needed to increase our staff," said John Thon, Laboratory Director. In addition, it has simplified the workflow in the lab. "When we started this process, we had couriers dropping off specimens in the afternoon and it would take several people several hours to hand

Matt Landolf:
Systems Interface Implementation Manager

Where in the World is Orchy?

Orchard's unofficial mascot, Orchy, is on the move again. Last newsletter, Judy Hild of the Wilce Student Health Center at Ohio State University in Columbus, Ohio, knew that he was visiting Paris, France. If you can identify Orchy's location in this photo, send your answer to news@orchardsoft.com by May 15th to be eligible to win an Orchard prize package. Log in to the Orchard website to see where in the world Orchy has been lately!

When dealing with today's complex integrated laboratory, no one understands Harvest LIS integration capabilities more than Orchard's Systems Interface Implementation Manager, Matt Landolf.

Matt moved from Arizona to join Orchard in June of 1999. He decided to move back to Arizona three years later in order to telecommute. Four years later, he returned to Carmel to better manage a growing staff.

Matt has worked as a systems engineer, installing Harvest LIS, Copia, and Aqueduct, and has also worked on host and reference lab interface projects. Before joining the Orchard team, Matt worked for nine years at Blood Systems Inc. as a Laboratory Technologist and Technical Supervisor.

As an Arizona native and Arizona State University grad with a B.S. in Biology, Matt is always there at heart. When Matt is not working, he enjoys spending time with family and decompressing with his wife and two sons Colin (8) and Thomas (6).

Rice Memorial
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enter all of the orders," said Connie Erickson, Co-LIS Administrator. "But with Copia, the facility places the order in the system and the orders are already in Harvest when the courier drops the samples off. All we have to do is scan them in. It saves us a tremendous amount of time."

In addition to the outreach solutions that Rice has found with Orchard, the laboratory staff at Rice has built a partnership with Orchard. "Rice Memorial Hospital prides ourselves on creating lasting business relationships with vendors who we can become partners with," said John. "Orchard has demonstrated a great sense of ethical behavior and integrity with which they present themselves, and we have not been disappointed with our partnership. Orchard has to be at the top of the industry as far as ethics and integrity goes."

Furthermore, John believes that Orchard's ability to understand the importance of their clients' workflows helps them succeed in their business. "Outreach is important to us and to our success," he said. "Family Practice Medical Center and Affiliated Community Medical Centers are our two biggest clients and Orchard understands that. They view our clients as their clients."

Spring Forward to Our Newest Release—Upgrade to Harvest LIS 7.5!

Our goal here at Orchard has always been to develop the best laboratory information system. Regular upgrades demonstrate that commitment, and ensure that our software remains at the top of the class. Hence, we are pleased to announce that this spring we will be releasing our latest upgrade to Orchard Harvest™ LIS!

The upcoming release of version 7.5 heralds the arrival of several new features, many of which were requested by you, our users. Some of the new features included in Harvest LIS 7.5 are:

- **Improved result delivery rules**, giving you more flexibility in creating rules for delivering your reports. You can specify groups of locations, providers, and other conditions in a single rule, as well as write "exception" rules. You can also specify multiple printers or fax destinations in a single rule.

- **All-new insurance handling**, allowing you to have an unlimited number of insurance plans per patient, and easily select and rearrange plans at the time you place an order to easily handle those unique insurance situations that are all too common.

- **AutoScan Explorer enhancements,** allowing you to manage the results that didn't match with a patient. You can quickly scan unmatched results, sort them, and manually match them to open orders, instead of retransmitting from the instrument.

- **Ability to configure a separate workstation to handle your web traffic**, reducing the burden on your database server if you make heavy use of Harvest Webstation.

- **Automatic scheduling of QC** for when specific order choices are ordered for a patient. You can also schedule your routine QC to be automatically ordered on a schedule that you define, using all the options you've used for years when creating a recurring order in Harvest LIS.

- **Unsolicited order handling** that makes managing your reference lab interfaces easier than ever. You can configure Harvest LIS to automatically create orders as it receives results from a reference lab or host system, without requiring an order to be placed ahead of time.

- **Extended automatic report scheduling capability to many of the management reports**, such as Billing Summary, Order Choice, Test Utilization, and the Collection List.

- **Enhancements to Turnaround Time Report** with date and time exclusions, so you can eliminate weekends, holidays, and hours your lab is closed from your TAT reports.

- **Automatic archive scheduling** that allows you to automate your archiving chores on a schedule you define. Instead of doing one large archive, you can let the system do a series of small archives on a daily, weekly, or monthly schedule.

- **Rules for label printing** that allow you to define rules to control how and where Harvest LIS prints labels. Rule conditions can apply to deferred orders, released orders, AP, Microbiology, or to all labels; and rules can be written based on collection location, ordering location, and priority (routine/STAT/ASAP).

- **Full compliance with Medicare changes to diagnosis codes**. You can store up to eight ICD-9 codes with each order choice, to comply with the latest requirements set by The Centers for Medicare and Medicaid Services (the new requirements are scheduled to go into effect on 7/1/2007).

- **Changed the priority of system-wide versus workstation-specific and Harvest Webstation-specific advanced configuration options**. In previous versions of Harvest LIS, ACO entries on the System-Wide tab always took precedence over entries on the other tabs. In version 7.5, you can set a system-wide ACO entry, but override it in Harvest Webstation or on a particular workstation.

- **Full Microsoft Windows Vista compatibility**. Harvest LIS 7.5 will be fully compatible with Windows Vista Business and Windows Vista Ultimate, and Orchard will provide support to customers running Harvest LIS with the new operating system.

…and much more!

Watch for information regarding Harvest LIS 7.5 in the spring of 2007! We will announce the release via email on our users groups and post notification on our website at www.orchardsoft.com. You may also call your account manager at (800) 856-1948 for more information.

Tech Tip: Customize Your Copia Order Patient Samples Page

One of the most exciting new features in the latest version of Copia is the ability to completely customize the Order Patient Samples page. This feature allows you to control what fields are available and the order in which the fields appear. You assign Order Patient Samples page layouts at the location level, so Copia displays the appropriate layout based on the signed in location settings for the user placing the order. In this way, you can limit the fields the user may access, or even rearrange the page to better match the workflow of your organization.

This article contains an overview of how to set up this feature. Refer to the online or printed help for Copia for more detailed information on creating custom Order Patient Samples page layouts. As you get ready to customize the Order Patient Samples page, remember that you must have the necessary rights associated with your assigned security role in order to access the administration setup pages.

Selecting a Layout

To get started, open the Administration menu, and navigate to Other Setup>Layout Templates. On the Layout Templates administration page you may create custom "Order Patient Samples Screen" layouts based on Copia's default page layout or on an existing custom layout, or create an entirely new layout.

Click the "Create New" link next to the Standard Order Patient Samples Screen option on the Create Templates tab to create a new layout based on Copia's default layout. We recommend starting with this option until you are comfortable designing layouts.

Adding or Modifying the Contents of a Layout

When you customize templates, you create or edit groupings of data, organized in a table format. By default, the Order Patient Samples Screen layout displays at least one grouping of a table with one cell (when starting with a blank template), though it may contain more tables and/or cells (when starting with a system or existing custom template).

When defining groupings, note that within a cell, you may add, move, or delete cells or rows, and you may add tables within cells that may, in turn, contain additional rows, cells, and tables.

As you add and remove fields and change the formatting or layout of the fields, Copia dynamically updates a preview of the Order Patient Samples page. This makes it easy to instantly see how your formatting or content changes will affect the page.

Editing a Table

To edit a table, click a T button in one of the customizable sections of the page to open the Edit Table pop-up window. Here you may define background shading and inner or outer borders for the table.

- Background shading is useful for tables used as title bars or for tables used to separate other groupings.
- The outer border is the rectangular border around the entire table. The inner border is the border between every cell within the table.

Editing a Cell

Click the C button to open the Cell Menu pop-up window, which allows you to add or remove elements in the selected cell grouping. Copia highlights the selected cell on the page so you can more easily track which cell you are modifying.
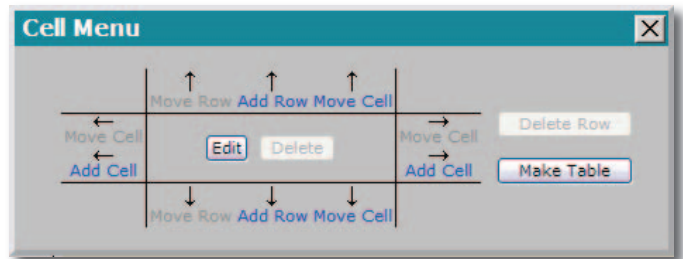
Click one of the Move Cell, Add Cell, Move Row, or Add Row links to perform the selected task in the direction indicated by the arrows. Copia displays the links in blue if the action is possible for the currently selected cell and in gray if the action is not possible.
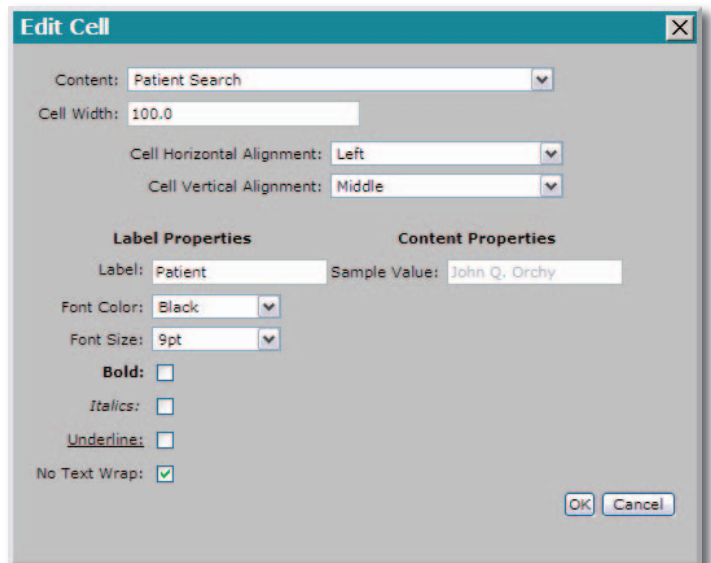
Custom Order Entry

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Click the Edit button to open the Edit Cell pop-up window, where you may select the content of the cell, the relative cell width, and the cell alignment, as well as basic formatting.

When you customize the Order Patient Samples Screen layout template, there is an Order Choice Columns section that contains several pre-defined columns by default, though you may add, modify, or delete columns from the template, as well as customize how the information in the columns appears. You may add this grouping of columns to a specific cell in your layout by selecting "Order Choice Columns" for the Content field for that cell. Be aware that if you do not specifically add these columns to a cell, they will not appear on the layout.

Important Notes About Settings that Affect Your Layout

Note that any of the signed-in location or user settings that affect the Order Patient Samples page will also take effect on this page. This means that if you have any settings that hide fields (e.g., collection date, phlebotomist, delivery date, etc.), then although you may add the hidden fields to a cell, Copia hides those fields on the page. Orchard Software recommends that if you use custom Order Patient Samples page layouts, then you should disable any settings that disable or hide fields you wish to use.

In addition, be sure that any fields that are required and that might not be auto-populated appear on your template.

Saving Your Layout

Once you have finished defining the layout of the page, click Save. You are now able to make the layout available to users.

Making a Layout Live in the System

After you have saved your layout, Copia adds it to the Custom Template List on the View Templates tab.

Before you may associate this page layout with a location, you must make it live in the system. Click the "Make Live" link next to the custom Order Patient Samples Screen layout template you wish to activate on the View Templates tab.

Once a template is live, you may make changes to the format, but Copia will not use the edited version of the template until you click the Make Live link again.

Assigning Layouts

Once you have defined one or more custom Order Patient Samples Screen layout templates, you may assign them to locations in the system on the Locations administration page. Then, the next time a user signs in to a location with a custom layout template, Copia displays the appropriate fields on the Order Patient Samples page. 🍎

The Order Patient Samples screen in Copia 4.0 allows you to create an extremely simple (above) or highly complex (left) layout.

Orchard Grows with Specialized Copia Development and Support

Throughout the past year, the Development and Operations teams have been diligently working behind the scenes to prepare for the biggest release of Copia history, Copia 4.0.

Orchard's Development department has dedicated a lead project manager, several software engineers, and several software quality assurance testers to enhance and perfect the Copia product.

In addition, Orchard's Operations staff has set aside a team of individuals who specialize in Copia support. They work exclusively with current and prospective Copia clients to ensure that their implementation, integration, and on-going support runs smoothly.

In addition to the support tasks, this team also works very closely with the Sales and Development depart-

Pictured above is the Copia technical support team (left) of Travis Easter, Bill Robinson and Jarrod Nicholas, as well as the Copia development team (right) of David Ronk, Steve Brady, Steve Gregory and David Hardwick.

ments to offer specialized client support and continually brainstorm ideas for enhancements and improvements in the software. If you are a current client and need to speak with a Copia specialist, call Technical Support at (800) 571-5835 and ask to speak to a Copia representative. 🍎

Orchard Enhances Web-based Connectivity with the Copia 4.0

The recently released Orchard Copia 4.0 incorporates a wide array of new features to enhance the versatility of Orchard's Internet browser-based outreach solution. For many Orchard customers, electronic outreach for remote order entry and results delivery via the web is an important facet for the success of their laboratory.

Currently, Orchard provides two web-based outreach solutions. Harvest Webstation provides remote order entry and result retrieval for a single business entity using a one-laboratory database. In addition, Orchard offers Copia, an outreach product for laboratories serving multiple business entities or numerous labs and draw locations.

Copia manages the flow of where lab tests are performed and adapts easily to floating physicians ordering

tests on behalf of different business units from a variety of locations. Copia can determine where the testing should be performed based on rules, and it will then deliver a compiled, unified result report to the ordering providers or locations. Users may then view all testing for a patient, no matter which lab performed the tests, through a single user interface.

In addition, Copia facilitates different draw scenarios and posts collection lists by location, as well as provides practice-based security and customizable reporting options. The various security settings in Copia give you all the necessary flexibility for maintaining your HIPAA compliance, and Copia is built on a SQL database platform, providing additional tools and scalability.

Copia 4.0 also includes a fully customizable order entry screen, robust order entry rules, expanded and enhanced location-based delivery rules, and improved test result graphing. A distributed Apache Tomcat install is now available, allowing Copia to be more scalable to accommodate future growth.

If you are considering a web-based outreach solution for remote order entry and result delivery, contact us at (800) 856-1948 and let us help you decide which outreach solution is best for your organization. 🍎

Feature Focus: Automated Document Linking Interface in Harvest LIS

While linking documents such as requisitions, ABNs, and insurance cards to patients or orders can be a tedious manual process, it doesn't have to be. To simplify this task, we have added an Automated Document Linking interface to Harvest LIS that may be configured on the workstion(s) that have a document scanner. Using this interface, the linking process can be as simple as three steps:

1. Scan an insurance card, requisition, or ABN with the document scanner.

2. Scan the bar coded patient ID or sample ID to give the image a file name.

3. The scanned image will be automatically linked to the patient or order per your setup.

Configuring the Scanner Software

In the Orchard Software training room, we use an HP ScanJet 4370. You may configure the ScanJet's software to scan a document and automatically save it as a PDF file using the one-touch scan button on the front of the scanner. You may also configure the software to prompt for a file name. The default file name is ENTERSID, but the user will replace this by using the reader to scan the SID on the sample labels. You should also configure the default folder where the ScanJet should save the PDF files. In the training room example, this folder is C:\ORCHHOST\PDF\.

Configuring the Interface

The Interface Configuration window is a restricted area of Harvest LIS. If you need assistance gaining access to this window, contact Technical Support at (800) 571-5835.

In Harvest LIS, if you have configured the interface to have an incoming path of C:\ORCHHOST\PDF, then this is the folder that Harvest LIS watches for any PDF files created by the document scanner. In the Host Parameter 1 field, enter "PDF" to direct Harvest LIS as to which type of file it should be watching for. In the Host Parameter 2 field, enter "ORDER." This directs Harvest LIS to

link any PDF file at the order level. It will use the name of the file (which is the sample ID) to determine which order in Harvest LIS that the PDF should be linked to. Patient-level linking uses "PATIENT" in host parameter 2, and the file name must match the PID of the patient. To scan both order- and patient-level links, you would need to configure two instances of the interface as appropriate, each monitoring the incoming path for their respective files.

Harvest LIS stores successfully linked files in a subdirectory of the incoming path entitled "Parsed Files." If files fail to link for reasons other than invalid file extensions, Harvest LIS stores them in a subdirectory of the incoming path entitled "Failed Files." There is no need to pre-define these folders, as the interface automatically creates them if they do not exist.

Document Scanner Software Issues

We discovered an idiosyncrasy of the HP ScanJet software when working with this feature in the Orchard Software training room: it will automatically append an incrementing sequence number to the end of the file name when it saves the PDF to disk. For example, if you try to save the file using the Harvest SID 1234, the ScanJet actually gives it a file name of 12340001.PDF. That creates a problem because the file name would no longer match the order's SID in Harvest LIS. To overcome this, add a setting to the System-Wide tab of the Advanced Configuration Options window:

```
[Automated Document Linking]
NumberOfCharactersInID=4
```

Using the sample file name above of 12340001.PDF, this ACO would direct Harvest LIS to match using only the first four characters of the file name. Instead of 12340001, Harvest LIS would use 1234, thus matching the SID assigned to the order in the database. The file would then automatically match and link to the correct order. If your sample IDs are longer, change the setting to reflect the appropriate sample ID length.
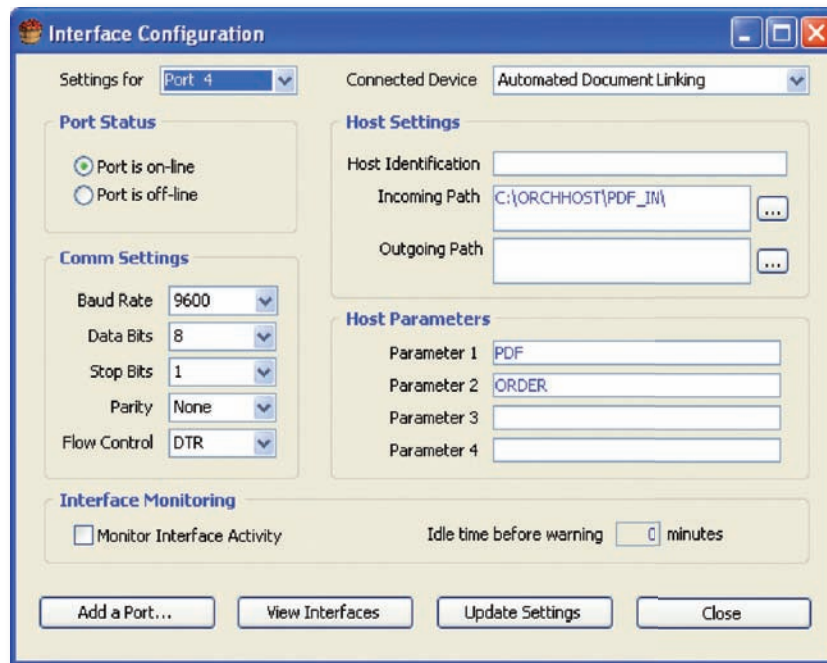
Orchard's Spring Symposium—Bringing the Orchard to you!

Orchard's Spring 2007 Harvest LIS Symposium will be held in Baltimore, Maryland, on Thursday, June 7, 2007, at the Embassy Suites at BWI Airport.

This day-long symposium provides you with an opportunity to learn more in-depth information about Orchard Software and Orchard Harvest LIS. The symposium will also offer you an opportunity to meet Orchard employees and other Harvest LIS users.

We encourage you to take advantage of this opportunity. There is no fee to attend, and complimentary continental breakfast and lunch will be provided. Your only costs to attend are travel, hotel, and other meals as needed. Space is limited, so register as soon as possible! Then, be sure to arrange for your travel and hotel needs.

For more information about the symposium agenda, details about travel arrangements, and to register for this event, visit our website at http://www.orchardsoft.com/symposiums.asp.

We are excited for this opportunity to bring the Orchard to you in your own backyard. We look forward to seeing you, and believe you will learn more about Orchard and the latest and greatest features and modules of Harvest LIS. Don't delay; register today! If you have questions, email us at sales@orchardsoft.com or give us a call at (800) 856-1948. 🍒

Orchard's Trade Show Calendar 2007

Dates	Name	Name
5/2/07 - 5/4/07	COLA/POL Spring Symposium West	San Diego, CA
5/2/07 - 5/4/07	Colorado Clinical Laboratory Collaborative	Denver, CO
5/2/07 - 5/4/07	South Dakota ASCLS & CLMA	Aberdeen, SD
5/2/07 - 5/4/07	Kansas ASCLS & CLMA	Wichita, KS
5/3/07	Oregon Spring Seminar	Agate Beach, OR
5/9/07 - 5/10/07	Indiana ASCLS	Indianapolis, IN
5/9/07 - 5/10/07	Central New England ASCLS	Providence, RI
5/9/07 - 5/11/07	Executive War College	Miami, FL
5/14/07 - 5/18/07	National Rural Health Conference	Anchorage, AK
5/16/07	Ohio River Valley CLMA	Columbus, OH
5/16/07 - 5/18/07	Minnesota Clinical Laboratory Collaborative	St. Cloud, MN
5/31/07 - 6/1/07	ACHA Annual Meeting	San Antonio, TX
6/6/07	North Country Lab Managers Seminar	Watertown, NY
6/7/07	**Orchard Baltimore Symposium**	**Baltimore, MD**
6/21/07 - 6/22/07	Southern ACHA Conference	Greenville, NC
7/17/07 - 7/19/07	Clinical Lab Expo/AACC*	San Diego, CA

*Orchard is not exhibiting

OrchardSoftware

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Enhance Web-based Outreach and Connectivity with Copia 4.0!