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OrchardSoftware



Harvest the Power

Orchard® Copia® Helps Carolina Medical Lab Set Itself Apart!

Osama Idlibi, Vice President – Billing & Information Systems at Carolina Medical Lab (CML) says, “Copia is our number one marketing tool! It provides a high level of customized support for each client.” It is that detailed level of customizable support that sets CML apart from other reference laboratories.

CML, located in Charlotte, North Carolina, is a family-owned reference laboratory servicing the Carolinas, Tennessee, and the surrounding states. When the doors to the lab opened in 1998, CML’s business stayed focused on pathology for the first two years. In 2000, CML expanded to offer clinical testing and purchased its first LIS (not Harvest LIS). Then in 2005, with demands and needs expanding, CML turned to Orchard Harvest LIS and Orchard Copia for outreach connectivity.

“Our business didn’t really kick-off until we got Copia,” says Mohammed Idlibi, Vice President – Operations. Since installing Orchard’s Harvest LIS and Copia in 2005, the lab has grown from 150 providers to more than 400 providers. “The ease of use and accessibility of the system are what set us apart,” states Mohammed. “Copia is the easiest and friendliest system I have ever used, and it allows our clients mobility. They can view results from any PC with Internet access. It is great for small clients with no EMRs or those who are getting EMRs. It is especially beneficial for nursing homes,” says Mohammed.

Today, CML is a full-service, customized, boutique-style laboratory operating 24 hours per day Monday through Saturday and running STATs on Sunday. The laboratory currently employs nearly 50 people and includes its own

courier service. Osama touts that CML offers customized service to physician offices with and without labs and nursing facilities with great turnaround time and excellent reporting capabilities. “Prompt custom delivery of organized results is what every provider wants, and Copia does a phenomenal job of managing every aspect of that process,” says Osama.



A part of that customized service begins with how CML is utilizing Copia. With Copia, the lab has the ability to customize order entry screens for each of their clients with specialized order options and order entry rules to help minimize errors. Osama adds, “Depending on the customer, we can make certain fields required for order entry. We can even customize the tabbing on the order entry screen to expedite the order entry process.”

“Copia’s order entry rules are a win-win situation,” explains Osama. “If we can eliminate billing errors at order

entry, we all save time and money. For example, Copia has the ability to match the alpha-numeric plan numbers for every insurance company we deal with. If, let’s say, there is a typo and the policy number entered does not match the expected pattern, it will alert the user so they can immediately

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Mark Jones: Senior Interface Specialist



In today's lab, the electronic exchange of data is vital. Integration is key, and Mark Jones is a man who makes that happen. For the past nine years, Mark, Senior Interface Specialist at Orchard, has built all kinds of HL7 interfaces for Orchard clients.

Prior to his work at Orchard, Mark spent 13 years in a hospital's clinical lab as a Medical Technologist before joining Sunquest Information Systems as an Implementation Consultant. Mark holds a bachelor's degree in Biology from Augustana College in Rock Island, Illinois, and his MT (ASCP) certification from OSF St. Francis Medical Center School of Medical Technology.

When Mark is not working, he enjoys spending time with his wife and three daughters Kelsey (19), Caitlin (16), and Alana (12). When he gets the opportunity, you may also catch him golfing, reading, gardening, and volunteering as a pit crew member for the Lawrence Central High School Band. ●

Carolina Medical Lab

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correct it. By doing so, Copia is acting as a front-end claims scrubber, thus providing faster claims reimbursement and eliminating a lot of the back-end billing work. That's a pretty powerful tool for everyone!"

Another important service offered by CML is electronic integration with their customers' systems to reduce the

manual entry of data. CML has interfaced with multiple EMR vendors and can easily interface with other Harvest LIS users. CML can also use Orchard Pathology to interface and deliver colored AP reports to other Harvest LIS laboratories. The lab has a demographics bridge application that can be established in 24 hours, saving their customers from manually entering a patient's demographic information for order entry.

CML works as a partner with their customers to supply them with information essential to enhancing patient care. "We work with them to understand their business, and then use the customization capabilities in Copia to support each customer's unique needs," explains Osama. "As an example, we use the data browsers in Copia to generate numerous specialized reports and schedule them to run and print automatically for our clients as per their request. A customer may want a report each day showing all urine cultures with growth for their facility, and another, a report of all abnormal results."



CML is constantly looking to bring on new customers. "Labs running 200 samples or less can strengthen their business with the help of a larger lab and that is where we come into play," says Mohammed. For more information on the products and services offered at CML, visit their website at www.cmedlab.com.

"If it wasn't for Orchard's customer support and programmers listening to their clients, Copia wouldn't be what it is today," states Osama. "Copia is a powerful tool whose capability is only limited by the creativity and imagination of its users."

CML expects to continue to grow its business with Copia. "If you are a reference laboratory and you want to grow, you cannot do it without an outreach product," says Osama. "Copia is a full-featured, flexible, user-tailored lab outreach ordering and resulting powerhouse." ●

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Feature Focus: Automatic Reporting with Data Browsers in Orchard Copia

We design all of our products to be highly flexible to meet the varied needs of the facilities that use them—from hospital networks to physician office laboratories to veterinary clinics to student health centers, and everything in between. One of the most important features to have, no matter what type of facility you have, is the ability to create reports. That's where Copia's data browser feature comes in.

This article provides an overview of the data browser feature in Copia, a look at two of the newest features available for data browser reports, and some examples of how these new features can free up your time for other responsibilities.

Overview of Using Data Browsers

Copia's data browser feature allows you to create completely customized

reports that list tests, order choices, orders, or patients that fall within your defined filter settings. Your filter will determine the data included on the report. Your filter may use elements such as priority (Routine, ASAP, or STAT), severity (Normal, Abnormal, or Critical), or contents of selected columns, and it can sort the information in ascending or descending order for any number of columns.

In addition to highly customizable filters, you may assign or create layout templates to design the look of the data browser report. You may save these filter and template settings for your data browser report, so you may use them again in future searches. You may also restrict data browsers to members of specified practices, which allows administrators to use and modify their data browsers without disturbing data

browser settings for other practices.

Once you have created the data browser report, you may view it in HTML or PDF formats, as well as print or export the report.

Users familiar with Harvest LIS will recognize

many of the features available on the Data Browsers page in Copia, as that page's features are roughly equivalent to those on the Result, Order Choice, Order, and Patient Browser windows in Harvest LIS. While Copia combines the data browser setup onto one page, many of the actions are more alike than they are different, despite the different appearance. In both programs, you can create and save filters, as well as configure what information appears on the report.

For additional information on setting up and using data browser reports, see the Copia online help.

Exciting New Features for Copia Data Browser Reports

Two of the newest features on the Data Browsers page give you the ability to set reports to use either a relative or absolute date range and to have Copia automatically create reports based on a defined schedule.

Relative and Absolute Date Ranges

To set a date range, first be sure to select the "Apply Date and/or Time Range" option on the Data Browsers page and to complete the date and time information as appropriate. Copia uses this information to determine the length of the date range. Next, click the Date Settings button on the Data Browsers page to open the Date Settings

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Data Browsers

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dialog, where you may select the type of date range you wish to use.

If you select “Use relative date range,” Copia displays the number of days in the range based on your date settings on the Data Browsers page. You may select the “Previous” checkbox and select Day, Week, or Month to use that as the date range. When you use a relative date range, it is not locked onto specific dates; Copia simply uses the same number of dates each time it creates the data browser report.

If you select “Use absolute date range,” Copia displays the dates in the range based on your date settings on the Data Browsers page. You may select the “Always use the current date in future searches” checkbox to have Copia use the current date each time it creates the data browser report. When you use an absolute date range, Copia uses the selected dates each time it creates the data browser report.

Click Save to record your selections and return to the Data Browsers page. If you want to save the date range with the data browser, click Save on the Data Browsers page. If you only want to use the date range for a single search, simply click Search on the Data Browsers page when you are ready to create a data browser report. Whether you click Search or Save, Copia will apply the date range you defined the next time it creates that data browser report.

Scheduling Events

If you want Copia to automatically run data browser reports, click the Edit Schedule button on the Data Browsers page. This takes you to the Edit Schedule page, where you define or modify the details for the schedule, including the timing for when Copia runs the report, the next date for the report, who the report is being created for, and

where to print or export the report. As you create the schedule, you will likely recognize the timing settings, as you use the same settings when defining the recurrence pattern for standing orders. Note that if you are editing an existing schedule, Copia tracks your changes in the Change Log.

Click Save to record your selections and return to the Data Browsers page. Once there, be sure to select the “Active” checkbox to activate the scheduling for your data browser and to have the data browser creation events appear on the Scheduled Events page (accessed from the Monitor menu). Once you save your setting on the Data Browsers page, Copia will begin to automatically generate the report according to your settings, allowing you to get the data you need, when you need it, and without additional manual processing.

Getting the Most out of the New Features

You can use the date range and scheduling features separately, but together, they are even more powerful! Below are a few examples of how you can make data browsers work for your facility:

- For your nursing home clients, set up a monthly report on urine cultures with growth.
- Create a daily report on accessioning totals from every location, including the percentage that came from each.
- Keep an eye out for maintenance issues by creating a weekly report on abnormal results, so you can track trends.
- Create a daily report that lists all critical results, so you can ensure your staff correctly follows up on them. ●

Edit Schedule Find Patient Search Recent ?

Schedule Details Change Log

Hourly* Daily Weekly Monthly Yearly

Repeat every 1 hours
 Repeat every 1 minutes

Next Date 09 / 17 / 2008 02 : 11 PM Now Clear
The system will populate the Next Date field if it is left blank.

For User* Adkins, Judith Search

Deliver to printer Search Clear

Export to Test Clear Double quotes and comma ▾

Sign Out Save Cancel

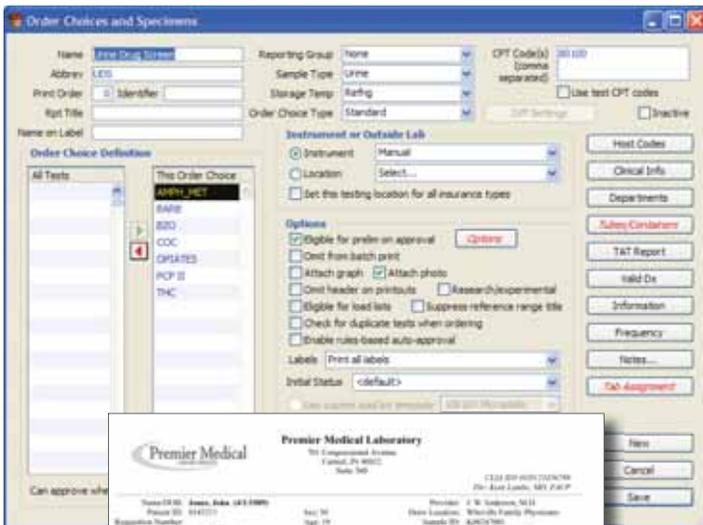
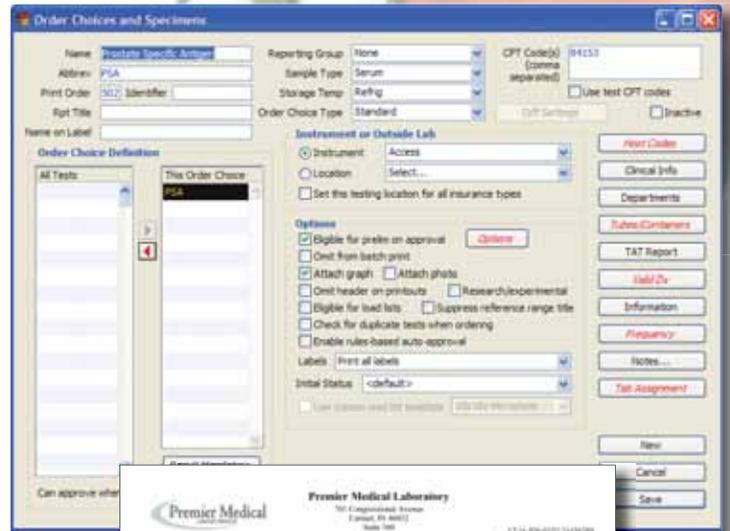
Cool New Order Choice Features for Harvest LIS 8.0

We've added two new features to the Order Choices detail window in Harvest LIS 8.0. On the Order Choices table window, look in the Options menu and you will see checkboxes to enable the "Attach graph" and "Attach photo" features.

Attaching Graphs

The attach graph function lets you add graphs to patient reports to visually demonstrate trending in patient results. Harvest LIS prints the graph below the last test in the order choice on the patient report. If order choices have more than one test graph, Harvest LIS will print a normalized graph.

A series of ACOs activate and control the appearance of the graph, including the height, width, and image justification. To use these settings, group ACOs for a specific order choice graph under a section header that consists of the order choice abbreviation followed by the word "graph" (e.g., [PSA GRAPH]). Contact Orchard Software Technical Support for help configuring these ACOs.



Attaching Photos

The attach photo feature allows you to add a patient's photo to the patient report. This might be useful in cases where laboratory testing is requested for occupational medicine, or for positive patient identification for sensitive testing scenarios. You may add ACOs to control the formatting of the photo on the report. Contact Orchard Software Technical Support for help configuring these ACOs.

These new features are examples of Orchard Software's commitment to continually enhance Harvest LIS with features that give our customers the best technology and tools to get their work done. 🍎

Tech Tip: Filters Make Harvest LIS Tables Easier to Manage

Many of us are familiar with using a filter when configuring a query in one of Harvest LIS' data browsers. Filters are those handy tools that screen out certain types of data so that, when the browser query completes, we see only the desired information.

In the newest build of Harvest LIS 8.0, the same concept has been applied to key system tables accessed from Table Setup. While every table isn't eligible for filtering, we think you will find that writing filters will help manage what, for many systems, has become a large amount of information!

How a Filter Can Help You

How can a table filter help? Writing a filter can help you locate or focus on a specific set of records in a very large table, instead of having to search by keyword or by sort column. For example, a filter can be very useful if you need to quickly locate all microbiology tests in the Lab Tests table, or find all result evaluation rules that apply to urine dipstick tests.

Filters can also be very useful to detect certain situations where you have configured a record in a manner inconsistent with other, similar records. For example, you can write a filter to detect order choices that have no print order, no storage temperature, or no tab assignment. You could use a filter in the Insurance table to review insurance companies that are configured to use the Medicare ABN format, but have not been configured to perform ICD-9 checking.

You can apply filters to any information that is present in the list view that is displayed when you initially open the table.

Which Harvest LIS Tables Use Filters?

Insurance	Rules—CPT Codes
Lab Tests	Rules—Order Entry
Locations	Rules—Results Delivery
Order Choices	Rules—Results Evaluation
Personnel	

Be descriptive! Enter a brief summary in the Description field.

You may make a particular filter the default for the table by clicking this checkbox.

Click on the parentheses or AND/OR columns to change their values. You can add up to four layers of parentheses. The AND/OR column can also be left empty.

Columns in this list are the same ones that appear in the list view when you initially open the table.

Review the logic of your filter by reading it left to right, line by line, grouping filter queries into logical sections where necessary using parentheses.

See "Filters" on page 7.

Filters

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Defining a Filter

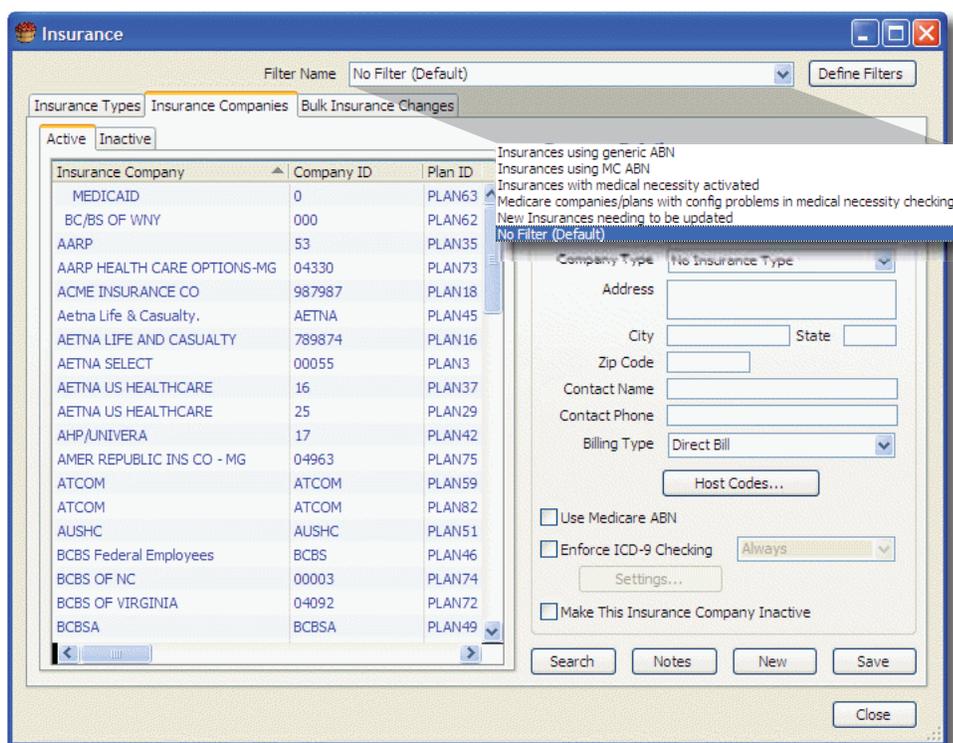
- Click the Define Filters button at the top of the table. The Define Filters window displays.
- Double-click on an existing filter to view its detail, or click the New button to configure a new filter.
- If you are creating a new filter, enter a brief summary of the filter's purpose in the Description field.
- Select the column you wish to compare values against from the Column Name list.
- Select the comparator using the "Value to compare to" menu, and enter the value to compare to in the field to its right. Then, click the Add Query button. Remember that the comparator options will change, depending on whether or not you are working with a numeric or text field.
- You may also edit a query by selecting it from the list, making your changes, and clicking the Update Query button.
- Add as many filter queries to the list as are needed. You may need to use parentheses or the AND/OR operators to group the queries logically.
- Click the Save button once you have finished configuring the filter.
- Once your filter has been saved, you may select it at any time from the "Filter Name" menu at the top of the table.

Applying a Filter

Once you've created and saved a filter, you may select it at any time from the "Filter Name" menu at the top of the table. Harvest LIS will then display only the records that pass the filter.

Each table also has a default filter, which is called "No Filter (Default)." This is actually a filter with no filter queries added. Although it is possible to do so, it is not recommended that you inactivate or alter this filter.

By extending the power of filters to table setup, Harvest LIS gives the LIS administrator additional tools to manage and review key elements of system configuration. Should you need assistance with configuring filters, you may contact Orchard Software Technical Support at **(800) 571-5835**.



Web-based Training Coming Soon!

Orchard Software is preparing to launch a new tool to help you and your staff learn how to take advantage of Harvest LIS' features. Soon all clients with a current support agreement will have access to new web-based training modules for Harvest LIS. Each of these one-hour training sessions will be instructor-led and will concentrate on a specific feature of Harvest LIS. Some examples of the training modules we are readying include order entry rules, result evaluation rules, browsers, and the use of statuses.

Watch Orchard's website for further details on our new web-based training.



Where in the World is Orchy?

Orchard's unofficial mascot, Orchy, loves to travel around the world. Last newsletter, he was visiting the Acropolis in Athens, Greece, which Cindy Boyle of Associated Physicians in Madison, Wisconsin, correctly



identified. If you can identify Orchy's location in this photo, send your answer to news@orchardsoft.com by November 15 to be eligible to win an Orchard prize package. We'll select a winner at random from the correct entries. Sign in to the Orchard website to see where in the world Orchy has been lately! 🍎

Orchard's Trade Show Calendar 2008

Date: 10/29-10/30/08
Show: Central New York CLMA
Location: Verona, NY

Date: 11/5-11/7/08
Show: CCLA Annual Conference
Location: Costa Mesa, CA

Date: 11/10-11/12/08
Show: NextGen Users Group Meeting
Location: Nashville, TN

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Address Correction Requested

The new scheduling feature for Copia's Data Browsers saves you time!