

## Central Ohio Primary Care Doubles Growth with the Support of Harvest LIS

In 2005, Central Ohio Primary Care (COPC) of Columbus, Ohio, had 16 provider locations caring for, on average, 750 patients per day and performing about 14,000 tests per day in their physicians office laboratory (POL). Today in 2011, the COPC group has tripled the number of provider locations and increased laboratory test volume.

“During our search for a new chemistry platform in 2005, it became obvious, as we looked at analyzers to handle our volume and continued growth, what we really needed was a new LIS,” states Rebecca Burk, Laboratory Manager for COPC. “Our original LIS was a good product that met our needs when our lab first started. But with such a tremendous increase in volume, and more growth expected, we needed to find a solution that would grow with us.” COPC began the LIS selection process with six vendors initially, narrowed the field to three, and finally selected Orchard® Harvest™ LIS. “It was like jumping from kindergarten to college,” was the analogy given by Jaime Calnan, Chief Technologist at COPC, to describe moving up from their previous laboratory information system to Harvest LIS.

Central Ohio Primary Care was founded in the summer of 1996, when 33 physicians from 11 practices merged into one corporation. The COPC laboratory began testing in January of 1997. Today, COPC is a unique multi-specialty organization that has

215 physicians and averages 28,000 to 30,000 test results a day, making it one of the largest provider groups in the country. And, the laboratory is not what is thought of as a typical POL. The team says, “Even though we service a group of



Central Ohio Primary Care's dayshift includes lab technicians, lab supervisors, billing members, CS staff, and phlebotomists.

physicians, we have the volume, instrumentation, and scope of testing—including microbiology and outreach—as if we were a hospital laboratory.”

An outreach program, currently servicing 30 nursing facilities in the community, was added in 1998. The outreach program provided a valuable patient care service in the community at a time when the local hospitals and reference laboratories were scaling back services for long-term care facilities. “Nursing homes require lab services 24 hours a day, 365 days per year,” states Kris Gaston, who manages the Outreach Lab Services Program for COPC. “We meet a critical need in the community for

these facilities by providing quality test results with an aggressive turnaround time.” Harvest LIS’ collection lists allow the outreach staff to be prepared daily to visit facilities for sample collection, and help the staff manage recurring orders.

“Flexibility of the Harvest system,” Kris adds, “allows us to close an order when a patient is discharged to go to the hospital for example, and then reopen the order when a patient comes back to the facility. This feature has really improved the way we maintain our orders, reduces the number of missed orders, and decreases return trips to the facilities.”

The COPC technical staff has mastered Harvest LIS, which gives them the ability to efficiently complete all the tests ordered each day. The process starts with the staff at each of the 48 practice locations placing electronic orders using

See “COPC Doubles Growth” on page 2.

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## Kelly Rusch

Western Regional Sales Manager



Kelly Rusch has been with Orchard Software for six years. She began her career as a Sales Coordinator, transitioned to Account Manager, and is now the Western Regional Sales Manager. Kelly works with prospective clients, helping them identify their requirements by analyzing their workflow process and demonstrating Orchard Harvest LIS, Orchard Pathology, and Orchard Copia. She also attends several tradeshows throughout the year, promoting awareness of Orchard Software and its products.

Kelly attended Butler University and began working at Orchard one week after graduation. Prior to working for Orchard, she completed internships at the Leukemia and Lymphoma Society in Indianapolis, Indiana, and Kodak in Washington, D.C.

Even though she spends most of her time travelling for work, Kelly still enjoys travelling, exploring new countries, and visiting friends and family. Kelly married her husband, Adam, in September 2009. They then moved from Indianapolis, Indiana, to Denver, Colorado, and are excited about spending time on the slopes during the winter months. They have a dog named Colby, a Sheltie-Bichon mix with blue eyes and a sparkling personality. 🍓

## COPC Doubles Growth

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Orchard's remote order entry system, Orchard® Harvest™ Webstation. Order entry was previously performed centrally in the lab after samples were submitted with paper requisitions. But now, Harvest Webstation is used at the time of service by the sites to create a complete order. The Harvest Webstation system prints requisitions with electronic signatures and bar code labels that are applied at point of collection. Also, medical necessity checking, sample type details, and storage temp info is available to the staff when placing an order. Samples are then couriered to the lab and

processed for testing, where they are added to the automation line, which handles many of the labor intensive processes that used to be done by staff. Uncapping, recapping, transporting, sorting, and archiving are all features of the line, none of which would be possible without an interface between Harvest LIS and the line. Stephanie Murphy, QA Supervisor, states, "The use of Harvest's order entry rules helps to sort the tubes, so the automation line knows where to send them." Rebecca continues, "We have actually doubled our test volume since 2006 without adding any technical FTEs by choosing the right LIS and automation partners."

Other features of the Orchard Harvest LIS that impressed the COPC lab staff include the many types of rules that can be defined. The lab staff uses many of the browsers in Harvest LIS to enhance the quality assurance program at COPC and also support Quality Reporting Initiatives, which improves patient outcomes. The QC work center, Micro module, reference lab interfaces and a variety of other HL7 interfaces, such as demographics, billing, and results, are features praised by the COPC staff.

Thirty-seven total FTEs make up the lab staff including two billers, three customer service representatives, six lab assistants, ten plus phlebotomists, one point of care coordinator, three supervisors, and twelve techs. State of the art equipment, including front-end automation, is utilized by the staff to provide quality test results in an extremely efficient manner.

As for the future for Central Ohio Primary Care Group and POL, Rebecca

states, "Like many in the medical profession, we are currently focusing on what changes we will face as health care reform continues to evolve. We are very fortunate that our physicians are actively engaged in managing health care reform. Our providers have a true appreciation for our laboratory services and how much Orchard Software Corporation applications have enhanced operations." 🍓



COPC's core team holding Orchard bobbleheads from left to right: Jaime Calnan, Chief Technologist; Rebecca Burk, Laboratory Manager; Kris Gaston, Outreach Manager; and Stephanie Murphy, Quality Assessment Supervisor.



Central Ohio Primary Care's second shift of laboratory technicians and laboratory assistants.



## Where in the World is Orchy?



Orchard's unofficial mascot, Orchy, loves seeing the world. If you can identify where Orchy is visiting, send your answer to [news@orchardsoft.com](mailto:news@orchardsoft.com) by February 15 to be eligible to win an Orchard prize package. Last newsletter, Brenda Martin of Missouri Cancer Associates in Columbia, Missouri, knew that he was visiting the Matterhorn in Switzerland. Sign in to the Orchard website to see where in the world Orchy has been lately! 🍎

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Contributing authors:

Audrey Blackwell	Kerry Foster
Thom Franklin	Kelly Haemmerle
Chris Livengood	Ford McAlexander
Debbie Schilling	Christine Stalcup

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## Tech Tip: Saved Criteria

The Saved Criteria function provides an easy way for you to control how information is displayed in Orchard Harvest LIS. Once the criteria are defined and saved, it is easy to quickly select the one you need. Saved criteria allow you to define optional column settings, order choice statuses, column views, and filters all in one handy selection that appears in the "Saved Criteria" drop-down list. Most of the important windows in Harvest LIS use saved criteria, which makes it a very useful tool. Additionally, you can use ACOs to specify your default saved criteria for specific windows.

Open the Column Views table to begin defining how you want the data to be displayed in Harvest LIS. The "view type" is important, since it assigns the column view you've created to the appropriate Harvest LIS window. Views consist of a selection of columns (standard and optional), arranged in any order and sorted in any order.

Note that the optional columns are "flex" columns; that is, they are placeholders where you will later assign the data field to that placeholder using the **Saved Criteria** button. For example, if you're creating a column view for the Rejected Orders Log, you can assign the desired data type to the optional column(s) using the **Saved Criteria** button on the Rejected Orders Log window.

To complete your saved criteria, click the **Saved Criteria** button in the appropriate Harvest LIS window to make your selections. Depending on the Harvest LIS window, the following fields will differ. This example refers to building a Review Results saved criteria. Also notice the absence of a **New**

button. You cannot make changes to the system default criteria, so if that is the only criteria you have, "Copy" it and edit as needed.

- Give your new criterion a name in the "Description" field.
- The "Report title" field is what will appear on a printed report generated from the window. This field does not appear in all Saved Criteria windows and it will be grayed out if you are in a window that is not printed (for example, Review Results).
- Select the "Status" where you want the view to appear, if applicable.
- Select the column view you created above as the default view. Not all saved criteria need a column view.
- Define a filter if needed.
- Designate your optional columns. Note that if you want to filter on an optional column, define them before you create your filter.
- Add notes as needed to jog your memory.
- Save your criterion.

This criterion will now be available in your drop-down list. If you make any changes to an existing saved criterion, Harvest LIS will assign it as "unsaved," so you will need to click **Save** once your changes have been made. To confirm your changes, Harvest LIS will ask you if you wish to overwrite the existing criteria.

For more information on column views, check out the "Harvest LIS Column Views" customer guide, available in the Download Center of our website. If you need help configuring column views and saved criteria, please feel free to contact Orchard Technical Support at (800) 571-5835. 🍎

# Copia Boasts Multi-level Security Features

With laboratory outreach becoming a popular source of additional revenue for medical laboratories, it is imperative for an outreach software solution to feature robust, configurable security parameters to meet a variety of client needs.

Orchard Copia was designed with this business scenario in mind, equipped with a role-based security setup, with four access levels that range from 3000 (base user access) to 7000 (administrative access). In addition, Orchard Copia also respects practice- and location-level security.

## About Role-based Security

A role is defined by designating the rights that a user will have when assigned that role. Rights can range from being able to click on a specific button to allowing access to an entire page in the application.

To create roles on the Roles administration page, click the Administration menu button, select Other Setup, and then select Roles. Once a role is created, you can assign various permissions to this role. At that point, you may assign the role to Copia users on the Users administration page.

## Access Levels Control Available Rights

The different access levels associated with rights (3000, 4000, etc.) limit which rights a user is allowed to assign to roles. Generally speaking, the higher the number a right has, the more powerful it is.

Users capable of editing roles may modify rights-based privileges for users that are at or below their own highest level. For example, if a user has only up to 6000-level access, they are not able to modify 7000-level access rights for other users, but may edit any other level of rights. This also prevents users from being able to assign themselves a higher level right than they currently have.

This multi-level system allows facilities to designate the different types of roles they want to define in the system. For example, a reference lab may need to create roles specifically designed for different clients based on their needs.

## Roles Mirror Workflow

Roles should be created with a user's specific workflow in mind. For example, a phlebotomist, a lab manager, and a provider would all use different features and different parts of the program, so you would create separate roles for each of them, with different rights assigned to each of the roles that allow them to access only the information and features they need. Also, you may assign multiple roles to a single user if their duties include many different workflows. As you can see, this method provides great flexibility in assigning security, especially when you combine role-level security with Copia's practice- and location-level security features.

## Practice- and Location-level Security

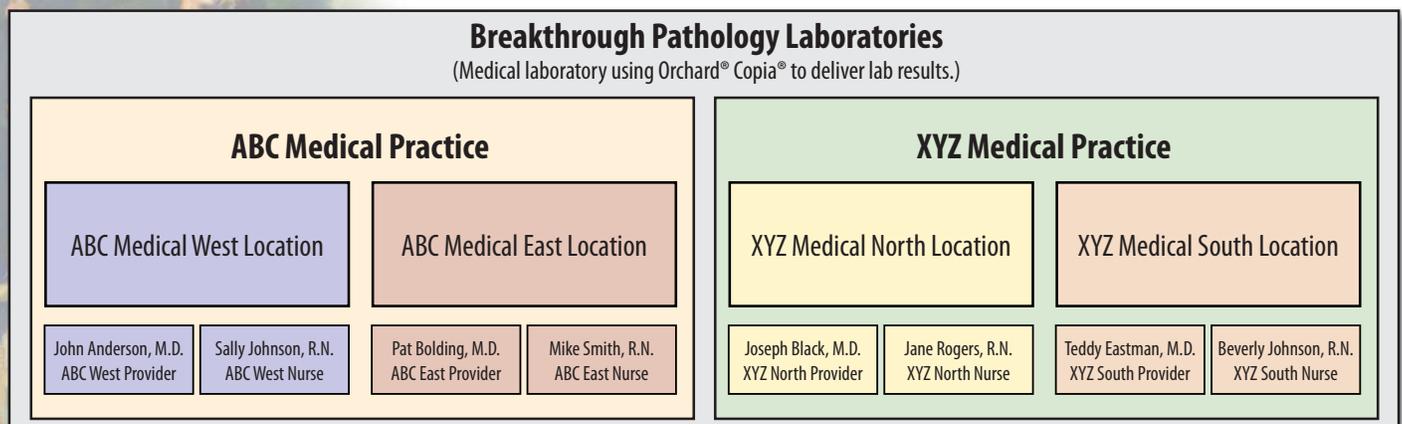
Orchard understands that a medical laboratory often serves multiple "clients"

or doctors' offices. In order to provide your clients with secure access to their patient results via the Internet and maintain HIPAA compliance, practice-level security is vital. So, in addition to roles-based security profiles, Orchard Copia also respects practice- and location-level security.

When configuring Orchard Copia, a user is assigned to a practice, which is associated with locations (ordering and signed-in locations). The user is also assigned specific roles for that practice.

In the diagram, Dr. Anderson is assigned to ABC Medical Practice with a role that allows him to look at result reports. With these settings, he can view all results from his practice, but cannot see any results from XYZ Medical Practice, a different practice. Sally Johnson is also assigned to ABC Medical Practice with a role that allows her to look at result reports. But in her case, she is only allowed access to orders placed for ABC Medical West Location. This is accomplished by limiting her access to that specific location when assigning roles to her for that practice. So, even though results from both ABC Medical Practice and XYZ Medical Practice are in one main database, Copia is able to protect both practices' information.

While this is just one example, with a practically infinite number of security roles, and highly flexible practice- and location-level security, Copia helps you keep your patients' data secure, no matter how complex your setup is. ●



# Feature Focus: Using the Spell Checker and AP Dictionary

Try as we might, even the best spellers can get caught by a typographical error. While it's relatively simple to head this off with pre-defined comments and text shortcuts, Orchard Software makes this even easier to handle with an all-new spell checker in version 8.5 of Orchard Harvest LIS and Orchard Pathology. Based on the professional-grade Wintertree spelling engine used by Fortune 500 companies and government agencies, the software comes with a default English dictionary that can be augmented with Stedman's Medical Dictionary.

## Configuring the Spell Checker

To enable the spell checker, add this ACO to your system-wide tab:

```
[Spelling]
EnableHarvestSpellCheck=true
```

When you restart your Harvest LIS client, you will be able to access the new Dictionary table. This table allows you to configure, either globally or on a per-user basis, the different options available for the spell checker. You may also disable the spell checker for specific users.

## How the Spell Checker Works

When the program finds a misspelled word, the spell checker will display the misspelling on the Spelling Check window, along with a list of suggested words to correct the issue.

From there, you may click one of several options:

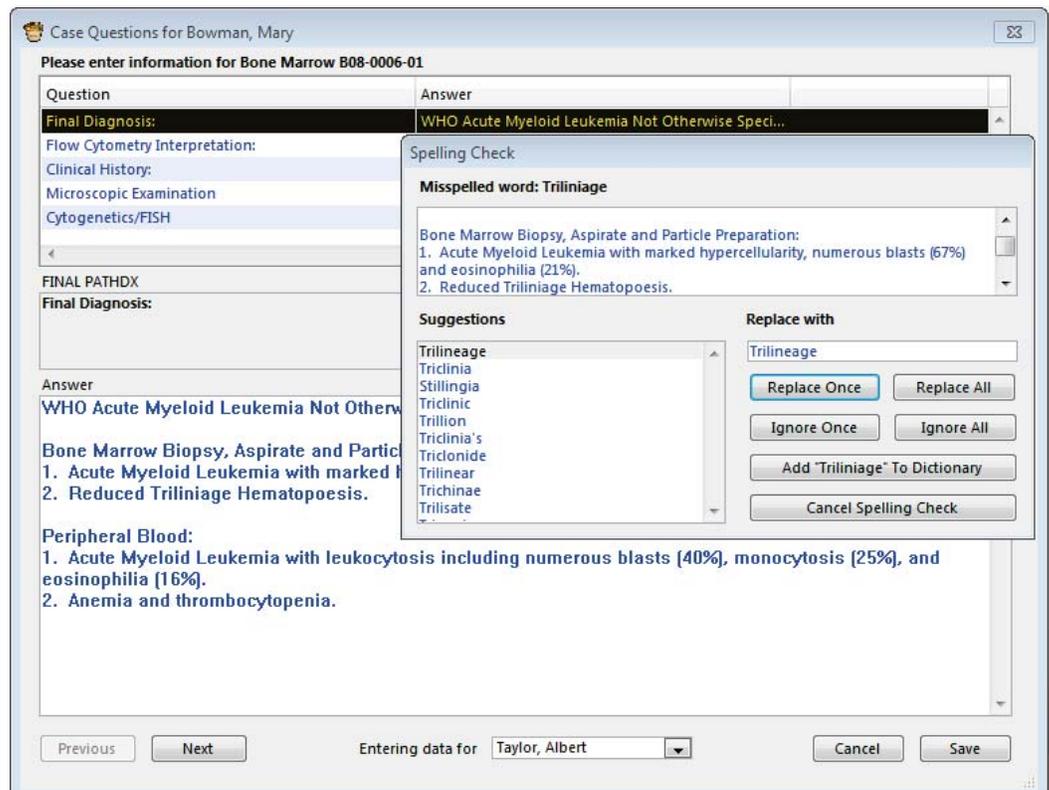
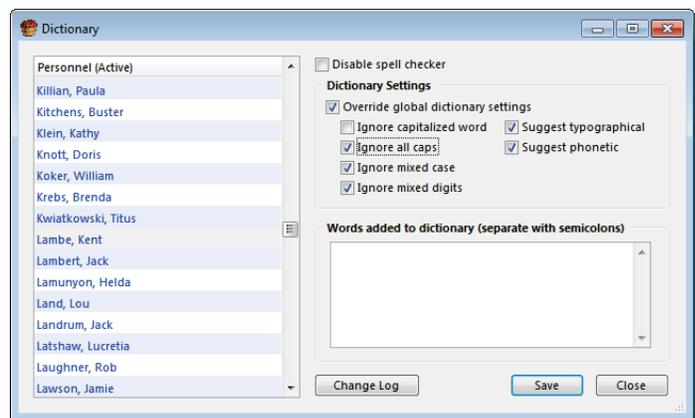
- **Replace Once:** Replace the misspelled word with the selected suggestion.
- **Replace All:** Replace the misspelled word with the suggestion everywhere this misspelling appears. If you cancel the spelling check before reaching the end of the text, all remaining appearances of the misspelling marked to be replaced by the **Replace All** button will not be corrected.
- **Ignore Once:** Leave the current misspelling as-is and move onto the next misspelled word, if any.
- **Ignore All:** Ignore the current misspelled word every place this misspelling appears.
- **Add to Dictionary:** Accept the currently found misspelled word as a correctly spelled word. Words added

to the dictionary will be stored in the program for the current user, and the spell checker will no longer report these words as misspellings for this user, even if the user signs into another workstation.

## Adding Additional Dictionaries

You must set an ACO in Harvest LIS or Orchard Pathology that specifies the path to additional specialized dictionaries. The path should not end in a backslash (“\”). While spell checking, the spell checker will access all files found to further spell check the text. These dictionaries will work in unison with the user dictionaries and the pre-installed English dictionary. For example:

See “Spell Checker” on page 6.



# Orchard Reorganizes Technical Support to Maximize Customer Care

Orchard Software is always striving to provide you with the highest quality of telephone technical support. To help us attain this goal, we have made changes to the technical support structure and telephone greeting options. These changes are designed to increase support quality and provide greater continuity of care.

We have divided our support staff into regional teams, each with a dedicated supervisor. The changes will provide each of you assistance from a more consistent and concentrated group of support agents. See the map of team leaders, their territories, and the respective states below.

So now, when calling into telephone technical support, you may press a specified key/number to reach your region's support team. This will help you gain access to your support team more quickly, or if you so chose, you may still select "0" for the operator. The regions and phone designations are as follows:

- **Northeast Region** – Team Leader Patrick Cunningham – telephone option 1
- **Southeast Region** – Team Leader John Kramer – telephone option 2
- **South-central Region** – Team Leader Geoffrey Ginther – telephone option 3
- **West Region** – Team Leader Alex Goodwin – telephone option 4

As always, you may reach Technical Support by calling **(800) 571-5835**, accessing our website at [www.orchardsoft.com](http://www.orchardsoft.com), or by emailing us at [support@orchardsoft.com](mailto:support@orchardsoft.com).

## Spell Checker

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```
[Spelling]  
DictionaryFolder=C:\  
LocalDictionaries
```

Make sure you use the location on your hard drive that you've copied your dictionaries to in this ACO.

You may purchase the Stedman's dictionary from Wolters Kluwer Health at **(800) 326-1685**, option 3. It is important that you specify the ASCII dictionary, not a spell check product. A variety of other dictionaries can be purchased from [www.wintertree-software.com](http://www.wintertree-software.com). You must purchase sufficient licenses for each workstation that will use an additional dictionary.

If you need assistance configuring the spell checker, feel free to call Orchard Technical Support at **(800) 571-5835**.

## Technical Support Regional Team Leaders



**Technical Support: (800) 571-5835**  
[www.orchardsoft.com](http://www.orchardsoft.com) - [support@orchardsoft.com](mailto:support@orchardsoft.com)

# Join us at CLMA ThinkLab '11 Sponsored by Orchard Software, May 22-25, 2011 in Baltimore, Maryland!

After another New Year, it is time to start preparing for another CLMA ThinkLab sponsored by Orchard Software. Many of you may already know that Orchard Software is the headline sponsor of CLMA's annual conference and exhibition. ThinkLab has always been a good show for Orchard, as many members of CLMA are laboratory managers who typically initiate the search for a new LIS. The two organizations continue to share mutual goals in delivering the best LIS product and information to their customers and members to improve the future of the lab industry.

CLMA is an international association of more than 4,000 clinical laboratory professionals. It plays a leadership role in educating and advocating for the future of the laboratory profession. CLMA ThinkLab offers endless opportunities for face-to-face interaction with the leaders and decision makers from hospital, independent, government, and academic laboratories. Attendees learn from highly respected speakers, networking opportunities, and educational sessions specifically designed for professionals at all levels of their

careers, from emerging laboratory leaders to seasoned C-Level executives.

ThinkLab '11, held May 22-25 in Baltimore, Maryland, will be a dynamic conference that shares real-life advice to



help you succeed. Join your peers and dedicate yourself to the industry.

Highlights include:

- More than 40 breakout sessions focusing on each area of CLMA's Body of Knowledge for Medical Laboratory Management
- Valuable networking events where you can make new contacts and reconnect with colleagues

- Educational sessions designed for professionals from all backgrounds and experience levels
- Highly respected speakers such as keynote speaker Dr. James Canton, PhD from the Institute for Global Futures
- In-depth pre-conference sessions on May 22
- More than 120 exhibitors showcasing the latest in laboratory equipment, products and services
- "Practical Application" opportunities on the exhibit floor

More than 3,500 members of the laboratory profession attend ThinkLab annually to take advantage of the cutting-edge education; an exhibition floor filled with vendors showing off the latest in laboratory equipment, products, and services; and opportunities to network with those who are leading the profession into the future. This year will mark the 35th anniversary of ThinkLab. We encourage each of you to attend this valuable educational event. For additional information about CLMA or to register for ThinkLab '11, please visit [www.clma.org/thinklab](http://www.clma.org/thinklab).

## Orchard Symposium 2011—New Format Featuring All Our Products

Back in 2006 when Orchard Software introduced our Orchard Harvest LIS Symposiums, Harvest LIS was our only significant product offering. Orchard Copia was still in its infancy and Orchard Pathology had just been released in January 2006.

Today in 2011, with more than 1,000 customers, we have significantly increased our Copia and Orchard Pathology user base, and we are at that point where we need an entire day designated for each of our three systems. And logistically, since some of our customers utilize various combinations of our products, holding these day-long events back to back in the same week will be more convenient for everyone. We also will move from two symposiums per year to one annual three-day event.

We have just begun working on our 2011 symposium. We are looking at Austin, Texas, as our location and will hold our symposium Tuesday through Thursday, June 14, 15, and 16, 2011. Tuesday will be dedicated to Harvest LIS, Wednesday to Copia, and Thursday to Orchard Pathology.

The Harvest LIS day will have a similar agenda and sessions as we have had in the past. *What's New in Harvest v8.5*, *Setting Up Rules*, *Data Mining*, and *HL7 Interfacing and Integration* are a few of our more popular sessions being offered on June 14, 2011.

Wednesday, June 15, will be dedicated to Copia. Note that the agenda and format will be a little different, as we will offer

See "New Symposium Format" on page 8.



701 Congressional Blvd., Suite 360  
Carmel, Indiana 46032

Phone: (800) 856-1948

Fax: (317) 573-2633

Email: [news@orchardsoft.com](mailto:news@orchardsoft.com)

Website: [www.orchardsoft.com](http://www.orchardsoft.com)

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**Save These Dates:**  
**CLMA ThinkLab '11, May 22-25, 2011**  
**Orchard Symposium, June 14-16, 2011**



## New Symposium Format

*Continued from page 7.*

four or five sessions, all being held in the same room. Some of the potential topics for the sessions will be *What's New in Orchard Copia, EMR Integration, Browsers and Data Mining, Formatting Reports, Quality Assurance, and the Client Services Module.*

Finally, on Thursday, June 16, our focus will be Orchard Pathology. Again, we will hold four or five sessions in the same room. Some of the various topics being considered are *What's New in Orchard Pathology, Cancer Summaries, Reports, Quality Assurance, Data Mining, and Dealing with Digital.*

We wanted to get this information out to our customers, so that you can begin planning for this week in June should you want to attend. For the most up-to-date information on location and sessions, please click the "Symposiums" link on our website, [www.orchardsoft.com](http://www.orchardsoft.com), under the "Support, Training, & Feedback" button in the menu on the upper left of our home page. We hope to have our location confirmed by the end of January. ●

## Orchard's 2011 Trade Show Calendar

Date	Name	Location
2/1/11	Molecular Summit - Dark Report*	Biloxi, MS
2/11-2/13/11	Florida Society of Pathologists	Orlando, FL
2/20-2/24/11	HIMSS 2011*	Orlando, FL
2/28-3/2/11	USCAP	San Antonio, TX
3/9-3/11/11	American Pathology Foundation	Las Vegas, NV
3/13-3/18/11	PITTCON 2011*	Atlanta, GA
4/6-4/7/11	Clinical Lab Scientists of Alaska	Anchorage, AK
4/12-4/13/11	NE Region Conference & Exhibition	Boxborough, MA
4/13-4/16/11	AMGA*	National Harbor, MD
4/14-4/16/11	G2's Molecular Diagnostics	Cambridge, MA

\*Orchard is not exhibiting