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OrchardSoftware



Harvest the Power

Valley Medical Center Improves Performance with Order Entry Rules

The new order entry rules in Orchard Harvest™ LIS version 7.5 were exactly what the director ordered. Tom Collier, Director of Laboratory Services at Valley Medical Center, also known as the “Father of Order Entry Rules,” was instrumental in working with Orchard to perfect this new feature. Orchard values customer input, and this continuous feedback drives Harvest LIS’ success.

Valley Medical Center witnessed first hand Orchard’s willingness to review, develop, and implement new ideas. Valley Medical, located in Lewiston, Idaho, is a multi-specialty clinic with more than 30 providers ranging from family practice to adult primary care, cardiology, pediatrics, surgery, podiatry, OB/GYN, and express care. They perform more than 250,000 tests annually, with all draws completed onsite. The lab has been able to build its entire client base through

word of mouth. Tom says, “We have a great reputation and great people. That is why people come to us.” It is this great reputation and focus on customer service that continues to feed the growth of the lab.

When Tom arrived at Valley Medical seven years ago, the lab did not have an LIS, but shortly after, they installed a small data management system to report out hematology results. Valley Medical soon realized its growth was moving beyond the system’s capacity, and they needed new options for a more complete lab information system.

A good friend from college recommended Tom consider Orchard, and at that year’s annual CLMA meeting, Tom was introduced to Orchard Harvest LIS. Tom spent a great deal of time at the Orchard booth learning what Harvest LIS could do for his lab. “I was impressed that there was a software



From left to right: Erin Davis, PRN Phlebotomist; Cheryl Dickenson, PBT(ASCP); Carol Dammarell, MT(ASCP); Heidi Graham, PBT(ASCP); Tom Collier, MT(ASCP); Julie King, Receptionist; Laurel Kutber, MT(ASCP); RaeAnn Wilks, Receptionist.

programmer there and intrigued by the rules-based system,” states Tom. “Knowing all of our problems at Valley Medical, I could see the potential for Harvest to make a real difference in our lab. It was simply head and shoulders above

See “Valley Medical” on page 2.



From left to right: Kathy Cone, MT(ASCP); Ed Ernsdorff, MT(ASCP) and Shelley Maxey, MT(ASCP).

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Gina Rhineberger: Software Testing Manager

Gina Rhineberger joined Orchard in January 2002. Beginning as a software tester, Gina is now the Software Testing Manager, and is responsible for a team of software testers working to ensure all Orchard products have the highest functionality. In other words, Gina and her team of testers make sure Orchard's products do what they are supposed to do. She has worked with Orchard Copia®, Harvest LIS, and Aqueduct®, testing the applications to decrease system glitches.



Gina is a graduate of Indiana University-Purdue University Indianapolis (IUPUI) with a bachelor's degree in English. In her free time she enjoys reading, bowling, playing computer games, hiking, and riding and showing horses. Gina has a wonderful daughter now in college who she enjoys spending time with as well. 🍎

Valley Medical

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the competition." In April 2005, Harvest LIS went live at Valley Medical Center.

Since that time, Tom and Valley Medical Center have been helping to spur ideas for product development. The process began in a System Administrator training class, where they were teaching about Harvest LIS' rules engines. Tom was looking for a way to better control order entry, and he saw an opportunity to expand rules to better control that process. This initiated the development of the order entry rules feature that first debuted in Harvest LIS version 7.0.

According to Tom, the best part of the order entry rules feature is that it allows Valley Medical to set up rules to eliminate recurring errors from order entry. "As an example, we had a provider who always ordered the wrong test

when in fact he preferred another, and through order entry rules, we were able to alleviate that problem." Tom also enjoys how rules can eliminate duplicate orders.

Because of its active role in helping advance Harvest LIS, Valley Medical Center beta tested Harvest LIS 7.5 for many months prior to its release. Tom expresses, "I am pleased to see almost everything I asked for is in the new version. The best part of Harvest 7.5 is its ability to screen secondary and tertiary insurance information to check Medical Necessity." He anticipates that Harvest LIS version 7.5 will positively affect the lab's bottom line.

"Orchard Software has been one of the most incredible vendors I have ever worked with," Tom exclaims. "The responsiveness and willingness to consider making changes and taking suggestions is extremely valuable. It truly has been a great experience. It makes my job a lot easier." 🍎



Where in the World is Orchy?



Orchard's unofficial mascot, Orchy, continues to travel. Last newsletter, Claudia Bergdoll of Cameron Memorial Community Hospital in Angola, Indiana, knew he was visiting Bemidji, Minnesota, but now Orchy is off to a slightly warmer locale. If you can identify where Orchy is visiting, send your answer to news@orchardsoft.com by September 1st 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! 🍎

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View the newsletter online at:
www.orchardsoft.com/news_links/newsletter/newsletterarchive.html

Tech Tip: Configuring Orchard Harvest™ Webstation Security Groups

Harvest Webstation can be a powerful tool for your facility, enabling your providers to order and retrieve results directly from Orchard Harvest LIS via a web-based user interface. By using Harvest Webstation, you can also help free up laboratory staff from basic order entry and result retrieval tasks.

To comply with HIPAA requirements, Harvest Webstation offers a sophisticated set of security options to handle a variety of laboratory and facility scenarios. However, all scenarios boil down to determining what security needs to be applied to four areas of Harvest Webstation:

1. Order entry
2. Looking up patient orders
3. Completed orders list
4. Unreleased orders list

Defining Security

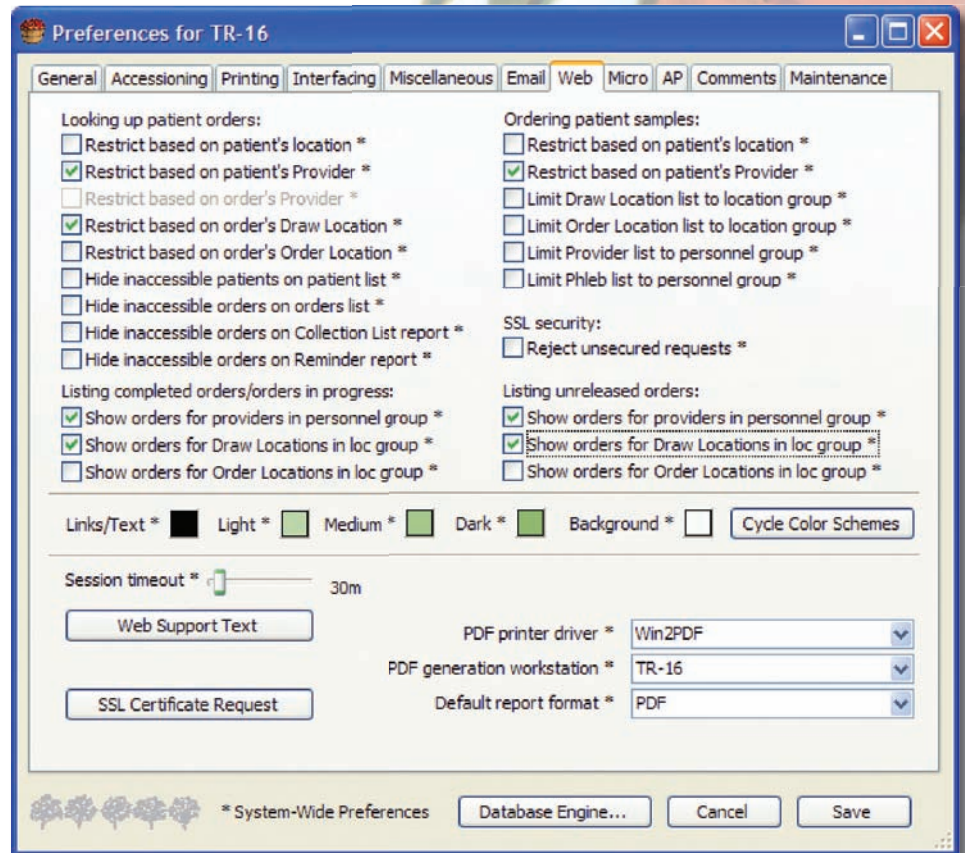
To define Harvest Webstation security, you first create Web Location Groups and Web Personnel Groups, and then you may configure how Harvest Webstation applies the security settings using the Preferences Web tab. Web Personnel Groups consist of groups of providers and/or phlebotomists, such as all providers in a practice, or all phlebotomists in a satellite laboratory. Web Location Groups consist of groups of draw locations and/or collection locations. These groups are used to limit access to patients and patient orders and to limit providers and/or phlebotomists available for selection during order entry. See the Harvest LIS help documentation for steps to create these groups and preference settings.

Applying Security

Once you have defined the security groups, you must set your preferences to control how Harvest Webstation applies those settings. Let's look at each of the sections of the Preferences Web tab to learn how you can use these security groups.

Looking up patient orders

The five "Restrict" settings determine how you are going to restrict access to a patient and their orders. When using more than one option, Harvest



Webstation restricts an order unless it passes all of the criteria.

- Restrict based on patient's location: This option restricts access to patients and their orders when the patient's location (as entered on the Editing Patient window) is not in the user's location security group.
- Restrict based on patient's provider or order's provider: These options are mutually exclusive. Restrict based on patient's provider to restrict access to patients and orders when the patient's provider is not in the user's personnel security group. Restrict based on order's provider to restrict access to patients and orders if the patient does not have at least one order where the ordering provider is in the user's personnel security group.
- Restrict based on order's draw location, or order's order location: These options restrict access to patients and orders if the patient does not have at least one order with a draw or order location in the user's location security group.

The first two "Hide" settings determine whether users may even see the existence of inaccessible patients and orders when looking up results.

See "Webstation Security" on page 4.

Webstation Security

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- **Hide inaccessible patients on patient list:** This option limits the patient list to patients with accessible orders. Uncheck this to allow users to view patient information and orders list. This allows users to see that a patient exists in the system without giving them access to their orders.
- **Hide inaccessible orders on orders list:** This option limits a patient's list of orders to accessible orders. Uncheck this to allow users to view, but not access, inaccessible orders. Harvest Webstation displays a small question mark link next to the Sample ID of inaccessible orders that explains why that particular order is inaccessible.

The remaining “Hide” settings determine whether to include inaccessible orders on other reports.

Listing unreleased orders, completed orders, and orders in progress

The three “Show” settings determine what orders to show in addition to the default orders for a user. By default, users may only see unreleased orders if they are the user who entered the order, and users may only see orders in progress and completed orders if they are the provider on the order. When using more than one option, an order has to meet all of the criteria for Harvest Webstation to include it.

- **Show orders for providers in personnel group:** This option adds orders where the order's provider is in the user's personnel security group.
- **Show orders for draw or order locations in location group:** These options add orders where the order's draw or order location is in the user's location security group.

Ordering patient samples

The two “Restrict” settings determine which patients users can select for an order. In both cases, if a patient is inaccessible, the patient will not appear in a list of patient matches when searching for a patient in the Order Samples page. When using more than one option, a patient has to meet both of the criteria for Harvest Webstation to include it.

- **Restrict based on patient's location:** This option restricts access to patients when the patient's location (as entered on the Editing Patient window) is not in the user's location security group. The patient location field is rarely used.
- **Restrict based on patient's provider:** This option restricts access to patients when the patient's provider is not in the user's personnel security group.

The four “Limit” settings determine which locations and personnel to list in the draw location, order location, provider, and phlebotomist lists.

- **Limit draw or order location list to location group:** This option only lists draw or order locations in the user's location security group. If not checked, Harvest Webstation includes all draw and/or order locations defined in Harvest LIS in the appropriate list.
- **Limit provider or phlebotomist list to personnel group:** This option only lists providers or phlebotomists in the user's personnel security group. If not checked, Harvest Webstation includes all providers and/or phlebotomists defined in Harvest LIS in the appropriate list.

Example

Let's say that a laboratory serves multiple draw locations. Those locations need to be able to see orders for their location only. There are multiple providers who travel among these different draw locations to see patients. Those providers need to be able to see only their own orders. Here's how to set this up:

- Create one location security group that includes all draw locations and create a location security group for each draw location.
- Create one personnel security group that includes all providers and create a personnel security group for each provider.
- Assign the specific draw location group and the full personnel group to each draw location.
- Assign the specific personnel group and the full location group to each provider.
- Select the options to restrict based on the order's draw location and on the provider.

With these settings, all providers will be able to see their own orders only, and all draw locations will be able to see their own orders only. If the providers work in practices where they need to see their colleagues' orders, create a personnel group for each practice instead of individual groups for each provider, and select the options to show orders for providers in personnel groups.

Each facility's requirements regarding Harvest Webstation security are unique. After carefully considering your needs, you may configure how Harvest Webstation applies the Web Personnel and Web Location groups in your system to provide maximum security and benefit to your staff. By using Harvest Webstation's powerful security features, you can provide easily accessible patient results to your staff, while complying with HIPAA privacy standards. ●

Submit Your Request for Upgrade to Harvest LIS Version 7.5!

In June, Orchard Software released Orchard Harvest LIS version 7.5! To take advantage of the new features and keep Harvest LIS up-to-date, please complete and submit the online Request for Upgrade form by logging on at www.orchardsoft.com in a timely manner to ensure your upgrade.

The feedback from you, our customers, is what drives the continuous development of Harvest LIS, providing you with an expanding list of features for greater flexibility and the ability to handle a variety of laboratory workflows and business situations. Orchard is committed to developing, installing, and supporting the very best laboratory information system, and part of this commitment is annual software upgrades.

In all, we added more than 350 new features or enhancements to Harvest LIS 7.5, nearly 300 of which were requested specifically by our users. Here are just a few of the enhancements in Harvest LIS version 7.5:

- **All-new insurance handling** allows 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 handle those unique insurance situations that are becoming all too common.

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



- **Unsolicited order handling** makes managing your reference lab interfaces easier. 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.

• **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).

- **Rules for label printing** are user-defined 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).

See "7.5 Release" on page 6.

Announcing Orchard's Fall Symposium in Dallas, Texas!

Orchard Software is pleased to announce our fall 2007 Orchard Harvest LIS Symposium. This will be our third symposium, as we move our way throughout the country.

It will take place in Dallas, Texas, on Wednesday, September 19, 2007, at the Radisson Hotel at Dallas Love Field.

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. For more details or to register for this event,

go to the main page of our website and click on the symposium link or go directly to www.orchardsoft.com/symposiums.asp.

If you are within easy access to Dallas by air or car, we encourage you to take advantage of this opportunity. Simply register online if you plan on attending. There is no fee to

attend, and a 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 your convenience and to help minimize your cost, we have negotiated a block of rooms at a reduced rate of \$89.00 per night plus tax at the Radisson Hotel



Sberyl Whitlock, Lillian Hagee, and Debra Kenaley (from left to right) from the University of Delaware Student Health Center talk with Interface Specialist Carla Hearst at the 2007 Spring Harvest LIS Symposium in Baltimore, Maryland.

at Dallas Love Field. There is a shuttle available from the airport to the hotel. Reserve your room by calling (888) 201-1718 or book online at www.radisson.com/reservation. When calling ask for the "Orchard Software Room Block" to receive the reduced room rate of \$89.00 plus tax. If you book online be sure to enter "OSC" as the "Promotional Code" in the "Search for Special Rates" section. You must reserve your room before August 27, 2007, to qualify for the special rate.

We are excited for our latest 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 in 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. ●

7.5 Release

continued from previous page.

- **Improved result delivery rules** give more flexibility in creating rules for delivering 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.

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

Remember, upgrades are on a first come, first served basis,

so don't delay, and submit the online Request for Upgrade form by logging on at www.orchardsoft.com.

If you, your administration, or your IT staff would like to learn more about Harvest LIS upgrades or have any questions, go to www.orchardsoft.com or call Orchard Technical Support (800) 571-5835. ●

Reference Range Reports

In this issue, we will be taking a look at two new features in Orchard Harvest LIS 7.5.

Order Choice Catalog

The first is the outgrowth of an existing feature in Harvest LIS' Order Patient Samples window: You may now access a list of order choices and additional details about them in a special window called the Order Choice Catalog.

You may access this window from the Laboratory menu, and you may add an Order Choice Catalog icon to your Work Centers toolbar.

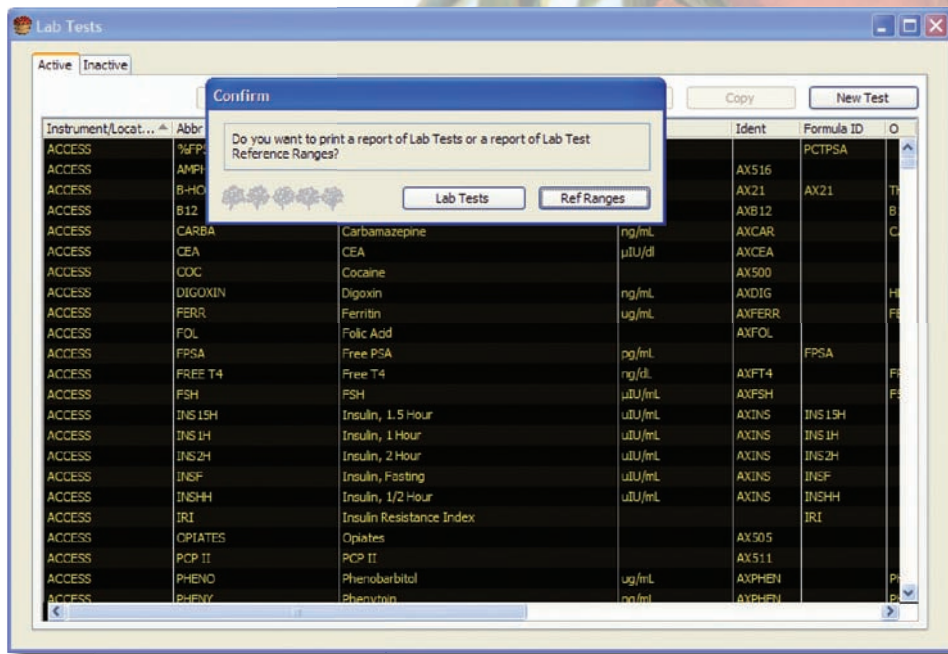
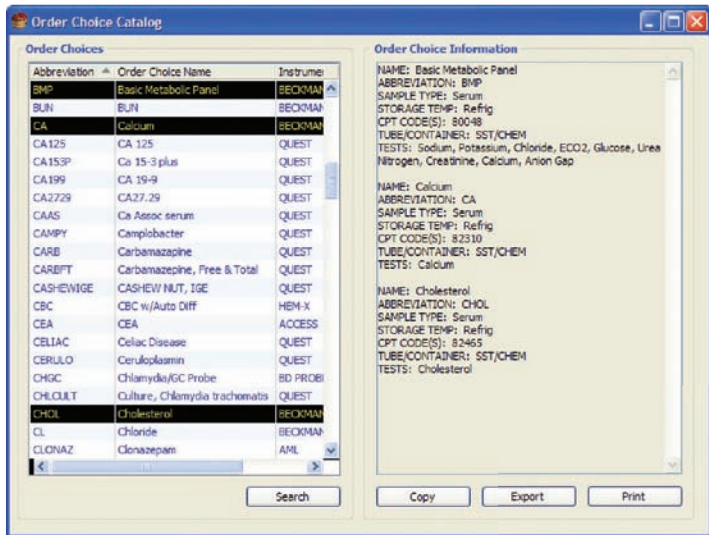
The scrolling list on the left side of the window is all order choices present in your system. You may omit any order choices that have not been assigned a tab on the Order Patient Samples window by using an Advanced Configuration Option (ACO):

```
[Order Choice Catalog]
HideNoTabAssign=true
```

This is an excellent way to “hide” order choices that most users have no real need or interest in perusing.

The Search button at the bottom of the window allows you to do a keyword search for an order choice by name.

Select the desired order choice in the scrolling list to display the pertinent details in the Order Choice Information field to the right. You may display the details for multiple order choices if required.



The Order Choice Information field displays the following information:

- Name
- Abbreviation
- Sample Type
- Storage Temperature
- CPT Code(s)
- Tube/Container
- Tests in the order choice
- Order Choice Information
- Host Codes

You may print or export the details for an order choice using the buttons at the bottom of this window.

Reference Range Report

Our second feature is the ability to create a reference ranges report. To create this report, open the Lab Tests table. You may select all or specific tests in the table, and then press [CTRL][P] on your keyboard. A dialog is displayed asking if you wish to print the table, or print a reference range report. Click the Ref Ranges button, and then make your selection to print all or only selected items.

The report includes default reference ranges, age- and race-specific reference ranges, and qualitative reference ranges. By default, Harvest LIS omits tests with no reference ranges, such as microbiology, AP, or those created by a reference lab interface. You may elect to include those using ACO entries:

```
[Lab Tests]
RangesIncludeEmpty=true
RangesIncludeAPMicro=true
```

We hope you will find these features helpful! Remember to review the release notes when you receive your upgrade for details on all of the new and enhanced features in version 7.5. 🍷

Mark your Calendars for CLMA ThinkLab '08

Last December, we announced that Orchard Software and CLMA had reached a multi-year agreement making Orchard Software the headline sponsor of ThinkLab, CLMA's annual conference and exhibition.

CLMA's ThinkLab '08 will be held March 29–April 1 in Atlanta, Georgia, and we encourage you to mark your calendar now to attend this valuable educational event. The conference is the leading educational event for clinical laboratory professionals, with numerous Continuing

Medical Education (CME)-accredited educational sessions designed to enhance the skills of



leaders at every level of personal and professional development.

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; as well as opportunities to network with those who are leading the profession into the future.

For additional information about ThinkLab '08, please visit the conference website at www.clmathinklab.org.

Orchard's Trade Show Calendar 2007

Dates	Name	Name
9/10/07 - 9/12/07	Advance Practice, Instruction & Innovation through Informatics (APIII)	Pittsburgh, PA
9/19/07	Kentucky ASCLS	Louisville, KY
9/19/07	Orchard Harvest LIS Fall Symposium	Dallas, TX
9/19/07 - 9/22/07	Inter-Mountain States Seminar	Jackson Hole, WY
9/25/07 - 9/26/07	Central New York CLMA	Verona, NY
9/26/07 - 9/29/07	COLA/POL Symposium East	Orlando, FL
9/26/07 - 9/28/07	ASCLS Region III Triennial	Myrtle Beach, SC
9/28/07	Greater Indiana CLMA	Carmel, IN
9/28/07 - 9/30/07	California Association for Medical Lab Technology	Sacramento, CA
9/30/07 - 10/2/07	CAP '07—The Pathologists' Meeting	Chicago, IL
10/4/07 - 10/6/07	Six Rivers CLMA	Mt. Sterling, OH
10/17/07 - 10/19/07	Northeast Laboratory Conference	Portland, ME

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