

## Graves Gilbert Harvests the Power of Rules in their Orchard LIS

In the nine years that Graves Gilbert Clinic has had Orchard® Harvest™ LIS, the clinic has seen remarkable changes and improvements. Their annual attendance at Orchard training courses provides tools for mastering Harvest LIS and a robust rules database aids their growth and expanded testing.

Graves Gilbert Clinic, located in Bowling Green, Kentucky, started in 1937 as a physician-owned multi-specialty clinic and remains that way to this day. The team agrees that “We are truly a family at Graves Gilbert. We are dedicated to each other and are not only co-workers, but also friends.” The lab is open six days a week, Monday through Saturday, and performs around 1,000 orders a day, including all in-house, reference lab, and waived testing. The clinic serves a populated area of around 300,000 in what recently became the third largest city in Kentucky.



*The lab staff at Graves Gilbert Clinic's main location in Bowling Green, Kentucky.*

In 1993, when Orchard Software approached Graves Gilbert about implementing a new Harvest LIS into their lab, they had no LIS and were using a DOS-based billing system as an order entry system. The billing system began to show weaknesses due to the growth of Graves Gilbert. After spending time comparing Orchard with other systems, they decided on Harvest LIS for being very user-friendly and because of their strong relationship with their sales representative, Keith McKinney (Keith was their instrument sales representative and is now the Director of Sales for Orchard).

Since the purchase of the Harvest LIS, the clinic also added Orchard's microbiology and pathology systems. Due to the additional tests, their lab volume grew significantly, and according to their past CLIA test volume numbers, they are performing

about 800,000 more tests a year (this number only includes Graves Gilbert's in-house testing). Despite the large growth, the lab staff remains at relatively the same levels since implementation. Craig Heckman, Chief Operating Officer of Graves Gilbert, says, “Things just ran much more effectively. The changes Orchard brought to the lab were remarkable.” The clinic appreciates that using Harvest LIS reduces the amount of paper orders and results. Heckman notes, “The system has put the results into the doctor's hands in real-time. We used to have staff whose primary responsibility was to run papers around the building.”

When asked about which Harvest LIS feature that Laboratory Manager, Yvonne Hermann, and Laboratory Assistant Manager, Debbie Allen, liked the most, they answered unanimously,

See “Graves Gilbert” on page 2.

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# Graves Gilbert

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“the robust rules system.” The two have written roughly 1,000 rules for the system. Debbie appreciates how simple it is to write the rules that she needs. “Through experiences of talking with other lab managers with other lab systems, they always have difficulty writing rules. Writing rules in other systems needs a large amount of programming knowledge and understanding; you don’t need that with Orchard.” The clinic’s rules database grew over the years, and Yvonne states

that they have rules for nearly every situation their clinic comes across. “We have split order, critical values, pediatrics, pathology, microbiology, and doctor-specific rules. Some rules allow for certain doctors’ tests to go to the specific reference laboratory they like to use.”

Graves Gilbert Clinic also benefits from the Harvest LIS quality control feature, which is used extensively by Debbie. “We don’t even use our chemistry analyzer for that. All of our quality control is in Orchard. Graves Gilbert’s quality control could be rather cumbersome, but Harvest LIS makes it so easy. All I have to do is download it to my desktop.”

Besides rules and quality control, the clinic frequently uses the result browser feature in Harvest LIS. Craig often asks Debbie or Yvonne to find certain lab results and he is surprised by how fast they can deliver an answer. Debbie likes the browsers for quality assurance purposes as well, providing the example, “A physician called in to ask why he has had elevated potassium level results. I can

quickly use the result browsers to find the reality of the test results.”

Yvonne and Debbie emphasize that their annual attendance at Orchard training classes provides them with the tools for mastering Harvest LIS. “We started going to training classes because it seems that every year Orchard develops new features. For one week, we both get to dedicate all of our time and energy to learning the new features. We are given a very helpful training book with pictures to take back to the lab to share with everyone else, which makes transition to new features much simpler. The annual attendance of Orchard’s training classes has allowed us to utilize everything that Harvest LIS has to offer.”

As COO, Craig thinks their attendance at Orchard’s training classes has made some of the most significant changes to the laboratory. “It seems that every time they come back from a training class that they have something new to implement to improve lab work flow and share with the rest of the team. The training courses are time well spent.” ●



Staff from Graves Gilbert's satellite location.



## Where in the World is Orchy?

Orchard’s unofficial mascot, Orchy, loves seeing America. If you can identify the name and location of this popular building, send your answer to [news@orchardsoft.com](mailto:news@orchardsoft.com) by August 15 to be eligible to win an Orchard prize package. Last newsletter, Francine Harvey of University of Southern California University Park Health Center in Los Angeles, California, sent in the winning entry that Orchy was visiting the Casa Rosada in Buenos Aires, Argentina. Sign in to the Orchard website to see where in the world Orchy has been lately! ●



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## Tech Tip: Orchard Harvest LIS Security

With all the threats to data security in today's IT landscape, viruses, once the bane of an IT administrator's existence, are becoming the least of their worries. From intentional leaks from disgruntled employees to blunders involving misplaced laptops, data is escaping from inside organizations. The threats of cyber attacks witnessed in the news on an almost weekly basis now are no longer the creation of bored teenage hackers looking for bragging rights. With global organized crime syndicates behind cyber attacks, the nature of how they attack networks is changing. No need for hackers to gather as much information as possible in one go; targeted attacks can now extract data over a longer period of time.

Healthcare companies must be more vigilant about who has access to patient data and information as a whole. As critical infrastructures grow more complex, so do threats to data security. Your sensitive data is more at risk now than ever before—creating the need for more comprehensive security practices to be in place. The following options and practices are available to help you improve the integrity, accountability, and security of your Orchard system(s).

- Use the ACO [General] SuppressMultipleSignIn=true to allow only one sign-in, per user, to the Harvest LIS system. This decreases the likelihood of false system logging due to a workstation being left signed into by accident.
- Help prevent users from potentially gaining full administrator rights by setting the workstation-specific option "Automatically sign out after X attempts" on the Miscellaneous tab of Preferences. The Harvest

Webstation setting for idle time sign out is a global setting on the Web tab of Preferences.

- Use the field sign in window, instead of the alternative list style that gives potential intruders a head start into your system by giving them the full names of Harvest LIS users. With a user's full name, the social engineering and other tactics would-be intruders have in their arsenal become more viable and targeted.
- Stay up to date on release notes, to see if system security group rights have been added to the system.
- Employing results security groups as a secure method to restrict results from certain groups of users (e.g., drug of abuse, STD, or HIV testing).
- Use SSL (Secure Socket Layer) encryption when publishing Harvest Webstation or Copia to the public internet. Confirm with your IT department that the SSL certificate in place is up to date and not expired.
- Review the User Actions Log to make sure employees are following relevant HIPAA and regulatory practices.
- Lock accounts after so many failed sign in attempts (via the Sign In and Password Settings window). This will dissuade a person that lacks proper credentials at a Harvest LIS workstation, and more than likely, they will simply move on.

- Implement LDAP (Lightweight Directory Access Protocol) to allow your IT department to manage login credentials, their requirements, and the expirations for your Orchard systems.
- Expire passwords (where LDAP is not in use) every X days. Passwords are remembered by the system, and it will prevent a user from reusing the same credentials.
- Use password requirement settings (e.g., eight or more characters and a mixture of characters, such as two alphabetic, two numeric, one non-alpha, and one uppercase character). You may find that enforcing three out of four of these settings can be useful in allowing your users a bit of wiggle room when having to comply to the character requirements set.
- Use PDF encryption in conjunction with Harvest LIS to deliver PDF reports via Harvest Webstation or email. PDF encryption requires a Win2PDF Pro license, not the standard Win2PDF license many clients currently use.

We recommend bringing these security options to the attention of your IT department and working with them to enhance the security of your system. Should you need assistance with configuring Orchard Harvest LIS security features, 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). 🍎



## Bob Clevenger

Project Manager



Bob Clevenger has been with Orchard Software for seven years, first as a Systems Engineer, and currently as the Orchard Pathology Project Manager. Throughout his tenure here, he has installed Harvest LIS, Copia, and Orchard Pathology.

Before coming to Orchard, Bob was the Director of Laboratory and Radiology at a mid-sized hospital. He also spent time as a network administrator for a radiology billing company and taught at an IT training school.

Bob graduated from the University of St. Francis with BS, MT(ASCP), and MS degrees. He also has MCSE and A+ certifications.

He has been married to his wife, Pamela, for 30 years. They have a son and two daughters. Bob enjoys woodworking, as well as reading science fiction and historical novels.

# Orchard Client Account Management Changes

To maintain and advance our level of service, on July 1, 2011, we added to our customer Account Management team and strategically aligned their territories to better serve you.

## Account Management Staff Added

We increased the Account Management team from six members to a team of ten, composed of five Account Managers and five Field Account Managers. We established the account team concept at the beginning of this year to enhance our service. These staff additions will not affect our current team structure of one Account Manager and one Field Account Manager for each of our customers.

## Review of Roles

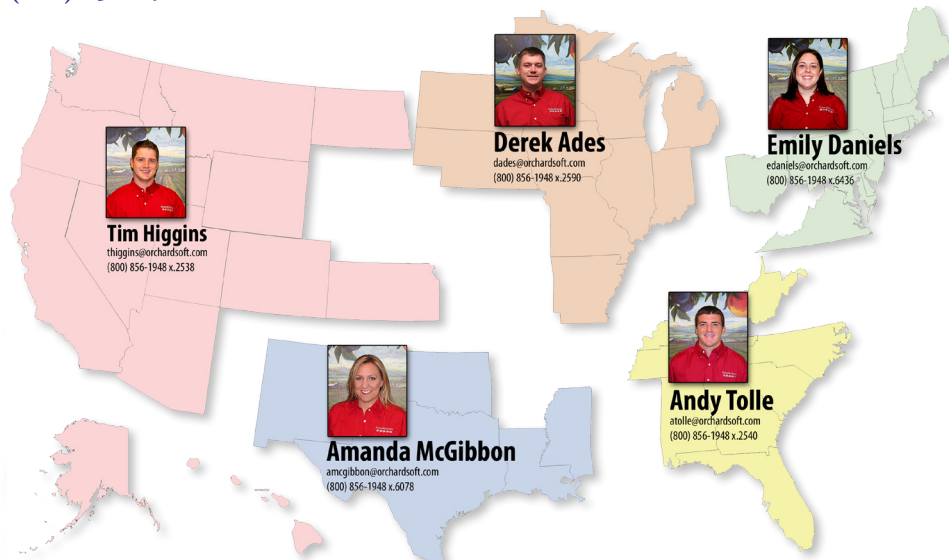
The Account Manager, working “in-house” from our corporate headquarters in Carmel, Indiana, is your primary point of contact, focusing on staying current with your lab and increasing customer service follow-up on projects that are being implemented. The Account Manager will present new opportunities that will enhance the value of your Orchard System through add-on Modules (e.g., Webstation, Microbiology, and Anatomic Pathology), additional licenses, instrument interfaces, host interfaces (e.g., EMR, PMS, or HIS), and reference lab interfaces, plus Orchard’s P.A.C.E.® accredited training classes, hardware upgrades, expansions, and replacements.

The Field Account Manager, working in the field, is the face-to-face extension of each account management team. They work in tandem with the in-house Account Manager to identify situations where an on-site meeting can facilitate customer service, aid in project follow-up, determine additional product needs, identify integration opportunities, fulfill requests, or resolve a problem. Since Field Account Managers are on the road and more difficult to reach in a timely manner, your in-house Account Manager is always the best place to initiate contact.

## Territory Realignment

By increasing staff, we had to make some adjustments to the territories. Therefore, some of our customers may have a new Account Manager, Field Account Manager, or possibly a new team entirely.

You may reach your Account Manager by calling Sales and Marketing at **(800) 856-1948**.



# Tech Tip: Pre-Analysis of Medical Necessity

By now many of you are familiar with how Orchard Harvest LIS can assist with maximizing first-pass reimbursements by printing an Advance Beneficiary Notice for order choices that fail medical necessity checking. The first visual cue is the diagnosis code turning red in the ordered items list on the Order Patient Samples window. However, the reimbursement problem and ABN dialogs display once you click the **Save** button. A new feature in Harvest LIS allows you to see exactly what failed medical necessity and why **before** you've clicked the **Save** button: the ABN Analysis window.

This feature was introduced in the 8.5.110407 release of Harvest LIS. If you have medical necessity configured in Harvest LIS, there are no additional settings required to use this feature.

Ordered (2)	Priority	Diag 1	Billing
LIPID	Routine	250.00	
DIG	Routine	250.00	

To view the ABN analysis for order choices, right click on any diagnosis in the Diag 1 column. Harvest LIS displays a contextual menu listing an "ABN Analysis" option you can select.

Harvest LIS will display the analysis in a pop-up window that provides details of what failed medical necessity checking.

ABN Analysis

Primary insurance enforces ICD-9 checking.  
Secondary insurance enforces ICD-9 checking.  
Tertiary insurance does not enforce ICD-9 checking.

The primary insurance will determine if there are invalid diagnosis codes.

\*\*\* ABN Analysis for Order Choice LIPID \*\*\*

Diagnosis code 250.00 is valid for the primary insurance.

No ABN will be triggered for this order choice.

\*\*\* ABN Analysis for Order Choice DIG \*\*\*

Diagnosis code 250.00 is invalid for the primary insurance.

An ABN will be triggered for this order choice for the following reasons:

Procedure "DIG" may not be reimbursable for the supplied diagnoses: 250.00

Copy OK

The following information is included in the analysis: whether or not the patient's insurances enforce ICD-9 checking, which insurance will be used to determine if the selected diagnosis codes are valid, followed by an ABN analysis for each order choice. The ABN analysis for each order choice will display whether the specified diagnosis code is valid, and whether an ABN will be generated for the order choice. If an ABN will be generated for the order choice, then the ABN analysis will also state the reason why the ABN was generated (e.g., order frequency, order is experimental/research, invalid diagnosis code).

Order Patient Samples Order Entry by: Franklin, Thom

Patient or ID: Smithers, Agnes Alerts Draw Location: SA

Sample ID: K11186001 Attach Ordering Provider: Cunningham, Usama

Items to order: P Phleb: Falcone, Sonia

Priority: Routine Order Location: HAP

Information: DOB: 10/11/1925 Age: 85 Sex: F SSN: 123452845 Patient ID: 2249502 Prior: 8 Future: 2 Insurance: TRAVELLERS RR MEDICARE; BLUE PREFERRED PPO

General Laboratory Microbiology Send Outs Miscellaneous Remote Lab 1 Remote Lab 2 Surgical Cyto-GYN Cyto-NonGYN

Abbreviation	Name
DIG	Digoxin
DIL	Dilantin
ESR	Erythrocyte Sedimen
FBS	FBS
FERR	Ferritin
FOL	Folic Acid
FP5A	Free PSA
FSH	FSH
FT4	Free T4
GGT	GGT
GLU	Glucose
GLU1HR	GLU 1 Hr PP 50g
GLUPP	Glucose PP
GLUR	Glucose, Random
HA1C	Glycated Hemoglobi

Ordered (2)	Priority	Diag 1	Billing
LIPID	Routine	250.00	
DIG	Routine	250.00	

ABN Analysis

Collection Date: 07/05/2011 10:02 AM Now Deliver: HAP (573-2633)

Received Date: 07/05/2011 10:02 AM Now Fasting: No 0 hrs.

ID comment: Requisition Number: Assign to: Additional Comments: Defer this order: Encounter: < none selected >

Tubes/containers needed: (1) SST/Chem, (1) ACS Tube

Clinical Info Additional Info Clear Order Save As Standing Save Order

Using this new feature can help you be proactive in resolving billing and reimbursement issues before the order is saved in Harvest LIS. If you have questions concerning this feature or need assistance with configuring medical necessity checking, 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).



# Feature Focus: Customer Service Made Easy with the Orchard Copia Client Services Module

The newest addition to our Orchard Copia application is the Copia Client Services Module. This module is an optional add-on to the Orchard Copia laboratory outreach solution. Client Services allows you to track inbound calls, collect data, monitor the quantity of supplies provided to clients, run reports, and schedule phlebotomy and courier routes. Using Copia's robust data browsers, administrative staff can create report templates and run reports on client calls, supply orders, courier routes, and many other vital pieces of information regarding client services support.

## Find Client Information Quickly and Easily

The ability to find clients quickly and easily is paramount to providing good customer service. In Copia's Client Services Module, customer service representatives can search for a client quickly by a variety of criteria. Once the client record is found, the representative can use the shortcut menu to easily access the pages where they perform common tasks, such as viewing collection lists, creating manifests, and reviewing pending orders. When accessing these pages through the module, Copia automatically filters the displayed data (e.g., collection lists or manifests) based on the client record open in the module. Beginning with the Copia update scheduled for late July, users will also be able to navigate back to the Client Services Module from any of these pages with one simple click.

## Track Call History

Within the Client Services Module, client services personnel can enter and track client calls for various reasons such as complaints, requests, and supply orders. In the item details, representatives can enter notes, a call summary, description of resolution, priority, and many other vital pieces of information to track client calls.

**Edit Item**

Item ID: Case-00000001 Assignee: Pruett, Valerie, MT

Status: Closed Department: Supply Management

Reason: Supply Request Open (EST) 04/22/09 11:12 AM

Priority: Low Modified (EST) 05/15/09 04:04 PM

Client: ABC Surgery Center Contact: Upton, Marge

Summary\* Thin Prep

Description: Marge called today to let us know she read about a product recall for the thin prep bottles.

Create New Item Pickup STAT Pickup Supply Shipment

Notes	Links	
Created by: Modified Date (EST):	Note Text	
Pruett, Valerie, MT 04/22/09 11:14 AM	John Q is aware of this recall. Our Thin Prep bottles are all newer than the recall. He suggested we post this to all our clients in a message.	Edit
Pruett, Valerie, MT 05/15/09 04:04 PM	Supplies Delivered	Edit

Save Delete Close

Orchard Online - Windows Internet Explorer

Client Services

Client ID: NPI: Practice: Sales Person: City: State: ZIP: Region: Contact Last Name: Contact First Name: Show Active Only Refresh Clear Filter

**Clients**

Client Name	Yes
ABC Medical	Yes
ABC Surgery Center	Yes
Cardiology	Yes
Client Nursing Home	Yes
Community Clinic	Yes
EndoLab	Yes
EndoLab Satellite Lab	Yes
East Center for Surgery	Yes
Emergency Room	Yes
Family Medicine	Yes
Health Center for Women	Yes
Hospital 2	Yes
Hospital 3	Yes
Intensive Surgery	Yes
Internal Medicine	Yes
Lab One	Yes
Laboratory Corp of America	Yes
Luxation	Yes

**Client Information**

Name: ABC Surgery Center Route Hours (EST): Sunday: None Monday: 03:00 AM - 10:00 AM Tuesday: 03:00 AM - 10:00 AM Wednesday: None Thursday: 03:00 AM - 10:00 AM Friday: 03:00 AM - 10:00 AM Saturday: None

ID: ABCSC Phone: 317-555-9854 Fax: 317-555-2222 Address: 701 Congressional Blvd. Suite 303 Indianapolis, IN 46207

**Courier Notes:**

**Contacts**

Client Name	Phone
Richardson, John	789-222-1111
Upton, Marge	789-222-1113

**Items**

Case	Item	Status	Priority	Supply Request	Date	Time	Location
Case-00000001	ABC Surgery Center	Thin Prep	Closed	Low	Supply Request	04/22/09 11:12 AM	Pruett, Valerie, MT
Case-00000006	ABC Surgery Center	Stat pick-up	In Progress	High	Stat Collection Request	04/22/09 03:04 PM	Pruett, Valerie, MT

Showing 1 to 2 of 2 entries

## Manage Courier Routes

As a reference laboratory, accurately managing your courier routes is of utmost importance to the quick turnaround of your results. With Copia's Client Services Module, courier routes can be created and assigned dates, times, and locations. Route hours are affiliated with clients to manage accurate information for each courier route.

## Maintain Inventory Controls

Providing testing supplies to your clients is a vital role of a reference laboratory's business. The Client Services Module helps you maintain regulatory compliance by managing client supply inventories in accordance to the Stark Law's provisions against improper inducements. The system helps track supplies so that users only distribute the appropriate amount of supplies to your clients. The system also maintains thorough inventory and supply fulfillment records to comply with regulations. Copia's Client Services Module allows users to add supplies into inventory when the laboratory receives a shipment by tracking the lot number and expiration date. Additionally, when a client calls to request supplies, users can create a shipment to a client and log that request in inventory control so that the laboratory's available inventory reduces accordingly.

## Find Client Services Information Using Built-in Reporting

Using Copia's robust data browsers, users can mine information stored within the Client Services Module quickly and easily. Administrative staff can create report templates and run reports on client calls, supply orders, courier routes, and many other vital pieces of information regarding client services support.

## Michael D. Glant, M.D. Joins Orchard As Medical Director



Curt Johnson, Chief Operating Officer for Orchard Software, has announced the addition of Michael Glant, M.D., to Orchard Software's team as Medical Director. Dr. Glant was previously the founder of, and a pathologist at, the second independent fine needle aspiration (FNA) clinic in the US, Diagnostic Cytology Laboratories, Inc., in Zionsville, Indiana. Dr. Glant, who assumes his new duties on July 5, 2011, will provide additional resources toward the development of Orchard's various laboratory systems to meet the evolving needs of today's integrated laboratory.

As one of the leading pathologists

in the country with an expertise in informatics, Dr. Glant created one of the first, if not the first, AP systems designed with discrete data and synoptic reporting capabilities for DCL Medical Laboratories. Based on this experience, Dr. Glant's input and guidance was influential in the design of the Orchard® Pathology system.

In his new role, Dr. Glant will work closely with operations, product development, sales, and marketing. With his assistance, Orchard will maintain its leading edge in laboratory software development and enhance installation, integration, service, and support capabilities. 🍅

## The Transition to ICD-10 is Coming! Will You Be Ready?

The ICD-10 transition affects everyone covered by the Health Insurance Portability and Accountability Act (HIPAA), even those who do not submit Medicare claims. There are many areas where the transition to ICD-10 will affect you.

### What Can You Do Now to Prepare?

**Planning:** CMS has indicated there will be **no grace period**. At midnight on October 1, 2013, any claims filed for dates of service (for providers) or discharge dates (for hospitals) on or after this date must contain ICD-10. Claims with day of service or discharge dates prior to Oct 1, 2013 must use ICD-9. Somehow the switch must be flipped. How will your facility manage the change?

**Personnel:** The volume of codes will increase about fivefold, and the style of the codes and code books will certainly change. What is your facility doing to ensure training for the appropriate staff? Reference labs have twice the responsibility. Not only do you have to bring your in-house staff up to speed, you also should have plans

in place to support your customers to ensure they are submitting proper coding with their orders.

**Document Control:** Think about where ICD-9 codes are included in your existing standard operating procedures and forms. Who will be responsible for updating them to reflect your processes for ICD-10?

**Cash Flow:** If you expect a gap in claim filing on or about October 2013, what are your plans?

**Payor and Vendor Contracts:** Will updates be needed?

**Testing:** Work with your vendors to develop a plan to test your system(s) for ICD-10 compatibility in advance of the conversion date.

**System Upgrades:** Will your current system's version support ICD-10? If an upgrade is needed, try to schedule this in advance so the new version(s) can be tested and validated.

### What is Orchard Doing to Prepare?

In anticipation of the October 1, 2013, transition from ICD-9 to ICD-10, Orchard Software is developing

product versions that will support the functionality required for ICD-10 coding. The current schedule is for software releases for all Orchard Software products to be available within the next 12 months. Orchard is involved in the industry and is keeping up with the latest news to ensure that our software will meet the requirements of the regulations and needs of our clients as details emerge and final requirements are set regarding ICD-10.

### Looking Ahead

Overall, remember that medical necessity will not go away. Labs have historically been dependent on the ordering provider to supply the proper code so you can be paid. The ICD-10 National Coverage Determinations are scheduled to be published later this year. Once that happens, training will be intense, so it is a good idea to have an education plan in place. 🍅





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Address Service Requested



## Orchard® Harvest™ LIS Receives ONC-ATCB 2011/2012 Certification



## Orchard® Harvest™ LIS Receives ONC-ATCB 2011/2012 Certification

We at Orchard are happy to announce that Orchard Harvest LIS v8.5 is 2011/2012 compliant and was certified as an EHR Module on June 8, 2011, by the Certification Commission for Health Information Technology, an ONC-ATCB, in accordance with the applicable Eligible Provider certification criteria adopted by the Secretary of Health and Human Services.

With this certification, our hospital clients can use Harvest LIS to send (surveillance data) directly to public health labs instead of their EMR. Stage 1 requires 5 of 10 menu (optional) items, one of which must be either lab results or public health surveillance. Since ELR is only listed as a menu item (optional) for EH, and surveillance data is a menu item for both EP and EH, we chose surveillance data in order to provide an option for both our hospital and clinic clients. Since we expect all menu items to become core

items in Stage 2, we plan to obtain certification for ELR in the very near future, allowing our clients the option to send ELR from the LIS. The proposed rule for Stage 2 also gives the EP the option to send ELR from their EMR or from their LIS.

Please visit our website at [www.orchardsoft.com](http://www.orchardsoft.com) for more information about our certification. ●



Orchard® Harvest™ LIS  
Version 8.5  
CC-1112-403780-1  
[orchardsoft.com/cchit](http://orchardsoft.com/cchit)

### Orchard's 2011 Trade Show Calendar

Date	Name	Location
7/24-7/28/11	Clinical Lab Expo/AACC	Atlanta, GA
9/18-9/20/11	NSH Symposium	Cincinnati, OH
10/4-10/7/11	Pathology Informatics 2011	Pittsburgh, PA
10/19-10/21/11	G-2 Lab Institute	Arlington, VA
10/19-10/22/11	Symposium for Clinical Labs/COLA	Dallas, TX
10/19-10/23/11	ASCP Annual Meeting	Las Vegas, NV