

## Consult/Request Tracking Setup Checklist

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
<b>1. DEFINE CONSULT HIERARCHY</b>			
<p>A. Define Service Hierarchy – create entries in file #123.5 as needed to support Consult requesting processes within the facility.</p> <ol style="list-style-type: none"> <li>1) SET UP CONSULT SERVICES option</li> <li>2) “ALL SERVICES” is always the top of the service hierarchy – should not be deleted and/or changed in any way; must always be IEN #1 in file #123.5 and never a sub-service of any other service.</li> <li>3) SERVICE USAGE – BLANK, GROUPER ONLY, OR TRACKING ONLY</li> <li>4) SERVICE PRINTER – After all printers are entered into the DEVICE file, assign SERVICE PRINTER to each consult service if auto-generating the consult request is desired.</li> <li>5) DC PARAMETERS – notify and/or reprint when request discontinued</li> <li>6) DX/PREREQUISITE/DEFAULT REASON – 4 settings that control how the user enters a specific consult service request.</li> <li>7) IFC FIELDS – see section 2 on implementing INTERFACILITY CONSULTS</li> <li>8) USER/NOTIFICATION PROCESSING – 13 fields related to who can update/process requests for the consult service</li> <li>9) SUB-SERVICE/SPECIALTY – Designate the sub-services for a particular consult service (e.g. for MEDICINE, maybe CARDIOLOGY,</li> </ol>			<p>SET UP CONSULT SERVICES option will create orderable items for CPRS.</p>

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PULMONARY, DERMATOLOGY, etc.)			
<p>B. Create Consult Services to interface with the Prosthetics Package</p> <p>1) COPY PROSTHETICS SERVICES option. Some fields are not editable as per the Prosthetics program office therefore; the COPY function retains the “required” information but allows service names to be appended with location information.</p>			
<p>C. Helpful reports for CONSULT HIERARCHY definition</p> <p>1) DUPLICATE SUB-SERVICE – used to help identify if a SUB-SERVICE has been associated with 2 consult services.</p> <p>D. LIST CONSULT SERVICE HIERARCHY – used to see the actual hierarchy “structure” that has been created.</p>			
<b>2. INTER-FACILITY CONSULTS MANAGEMENT</b>			
<p>A. COORDINATION WITH PARTNERING FACILITIES</p> <p>1) Communication is key and sharing of exact consult service names is CRITICAL to facilitate a consult being sent from one facility to another.</p> <p>2) RESTRICTIONS – PROSTHETICS and PROCEDURES that interface with the CLINICAL PROCEDURES package CANNOT be defined as IFC services.</p> <p>3) REQUESTING/SENDING FACILITY</p> <p>4) IFC ROUTING SITE – One exact entry from file #4 INSTITUTION</p> <p>5) IFC REMOTE NAME – FREE TEXT field that must be an EXACT name match of the service name at the designated IFC ROUTING SITE</p> <p>6) CONSULTING/RECEIVING FACILITY</p>			

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<p>7) IFC SENDING FACILITY (multiple) – Multiple entries from file #4 INSTITUTION to designate the locations that can send this IFC request to the CONSULTING site.</p> <p>B. IFC PROCEDURE – REQUESTING FACILITY</p> <p>1) IFC ROUTING SITE – One exact entry from file #4 INSTITUTION</p> <p>2) IFC REMOTE PROC NAME – FREE TEXT field that must be an EXACT name match of the procedure name at the designated IFC ROUTING SITE.</p> <p>C. IFC PROCEDURE – CONSULTING FACILITY</p> <p>1) IFC SENDING FACILITY (multiple) – Multiple entries from file #4 INSTITUTION to designate the locations that can send this IFC procedure request to the CONSULTING site</p> <p>D. TEST IFC IMPLEMENTATION – option allows REQUESTING SITE (only) to test the communication between the REQUESTING SITE and the CONSULTING SITE for any particular IFC CONSULT SERVICE; “CONGRATULATIONS” message indicates successful communication link.</p> <p>E. IFC MAIL GROUP SETUP</p> <p>1) IFC PATIENT ERROR MESSAGES – Members should be able to resolve MPI related issues and/or register patients.</p> <p>2) IFC CLIN ERRORS – Members should be CAC types who can facilitate resolving clinically-related issues for the IFC.</p> <p>3) IFC TECH ERRORS – Member should be IT types who can facilitate resolving HL7-related issues.</p>			

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<p>F. IFC BACKGROUND JOB</p> <p>1) GMRC IFC BACKGROUND START UP.</p> <p>a) Tasked every 8 hours</p> <p>b) Upon System Startup</p> <p>c) Whenever TaskMan unexpectedly stops</p> <p>1) MONITOR IFC BACKGROUND JOB PARAMETERS – allows CAC &amp; IT types to view the status of the GMRC IFC BACKGROUND STARTUP task.</p>			
<p><b>3. MEDICINE INTERFACE</b></p>			
<p>A. PROCEDURE SETUP – add procedures to GMRC PROCEDURES (#123.3)</p> <p>1) Very similar to creating a CONSULT SERVICE.</p> <p>2) Useful to create CONSULT SERVICES first then the procedures.</p> <p>3) RELATED SERVICES (multiple) – designate those consult services where this procedure is performed.</p> <p>4) TYPE OF PROCEDURE – pointer to MEDICINE package PROCEDURE/SUBSPECIALTY file #697.2; this link turns “ON” the interface between consult procedure and Medicine package procedure.</p> <p>5) IFC PROCEDURES can be created (see Section #2)</p> <p>6) LINK MEDICINE RESULTS TO CONSULT PROCEDURE REQUEST – done via CPRS, CONSULTS TAB</p> <p>7) REMOVE MEDICINE RESULTS FROM A REQUEST – controlled by USR USER CLASS membership associated with the REQUEST SERVICES associated with the PROCEDURE.</p>			
<p><b>4. TIU INTERFACE</b></p>			

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<p>A. CONSULTS DOCUMENT CLASS within PROGRESS NOTES DOCUMENT CLASS  1) Notes associated with completed consults will be viewable from CPRS/NOTES tab.</p> <p>B. CONSULTS DOCUMENT CLASS within CLINICAL DOCUMENTS CLASS  1) Notes associated with completed consults will ONLY be viewable from CPRS/CONSULTS tab</p> <p>C. TIU DEFINE CONSULTS from TIU*1*4 will allow site to determine how they want to define their CONSULTS.</p> <p>D. LINK WITH REQUEST – to fix misdirected TIU notes that get associated w/the wrong consult request.</p>			
<b>5. PARAMETERS</b>			
<p>A. GMRC CONSULT LIST DAYS – How far back to find consult requests to associate w/notes</p> <p>B. ORWDX NEW CONSULT – On the CPRS/CONSULTS tab, allows CAC to configure an ordering menu for consult ordering (could be a menu of quick orders)</p> <p>C. ORWDX NEW PROCEDURE – On the CPRS/CONSULTS tab, allows CAC to configure an ordering menu for procedure ordering (could be a menu of quick orders)</p> <p>D. ORWOR SHOW CONSULTS – On CPRS/NOTES tab, shows the unresolved consults appropriate for patient and user (only those services where the user is an update user) when user is creating new notes (the “NAG” screen).</p>			
<b>6. QUICK ORDERS</b>			
<p>A. QUICK ORDERS allow you to control the consult-related prompts; fields can be pre-populated and the quick orders can then be placed on an ordering menu.</p>			

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B. ORDER MENU MANAGEMENT option contains option ENTER/EDIT QUICK ORDER C. TIU TEMPLATES can be linked to CONSULT REASON FOR REQUEST via CPRS/OPTIONS/NOTES tab EDIT SHARED TEMPLATES.			