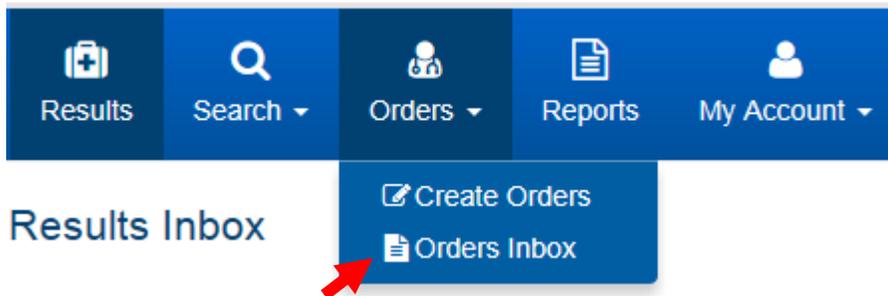


## ➤ Orders Inbox

- From the Orders Inbox you can easily view and track referrals you have submitted.
- To find the Orders Inbox, go to the blue menu bar along the top of your screen and click Orders.

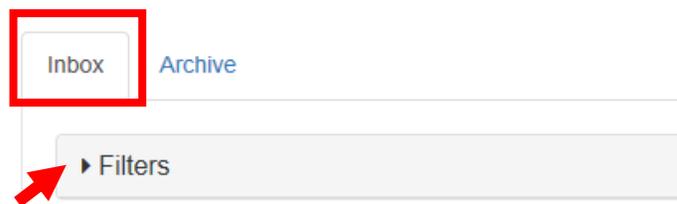


- Select Orders Inbox from the drop down menu.

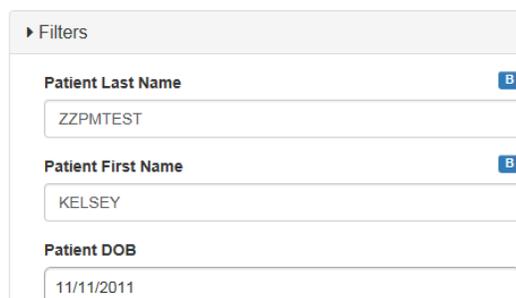


- From the Orders Inbox, you are able to set the Filters to view orders by patient, form type, referral status and/or service requested.
- To change your inbox filters, make sure you are on the Inbox tab and not the Archive tab. The Archive function will be explained later. Click Filters.

### Referrals/Orders Inbox



- To search for a specific patient, enter in the patient's information in the filter criteria on the left and click the Search button in the lower right corner.

A screenshot of the 'Filters' section. It contains three input fields: 'Patient Last Name' with the value 'ZZPMTEST', 'Patient First Name' with the value 'KELSEY', and 'Patient DOB' with the value '11/11/2011'. Each field has a small blue 'B' icon in the top right corner.

- For day-to-day function, you can set your filters by form type, status and/or service requested.
- Select the Form Type. If you want to view all consult and radiology requests, click ALL.

**Form Type**

All
Consult Service Request
Request for Medical Imaging

- Next, choose the Form Status. To select multiple, simply click on each status you wish to view.

**Form Status**

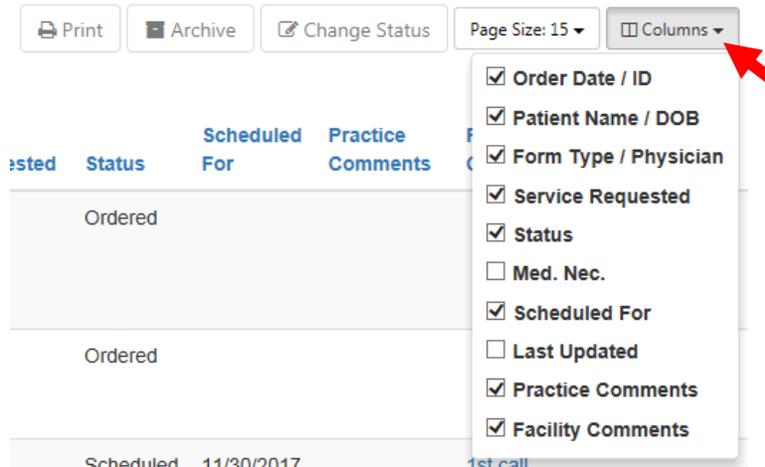
Ordered	▲
In Process	
Modified	
Cancel Order	
Scheduled	▼

- To view orders by the specialty clinic, type the clinic name in the Service Requested field.

**Service Requested** C

- After all filters have been selected you will click either the SAVE or APPLY button in the bottom left corner of the Filters tab.
- By clicking SAVE, you are saving those filters so that your inbox will default to these settings each time you login.
- By clicking APPLY, you are applying those selections for a one-time search.
- If you want to reset your filters, click CLEAR.

- Set your column preferences by clicking Columns and selecting the column headings you want to view.



- Each order in the inbox will have an Order ID number listed below the date the order was submitted. You can view an order by clicking on the Order ID.
- That will open the document in a separate window where you can view the order to check the appointment date/time as well as any Facility Comments left by Children’s Mercy.

Referral/Order Date / ID	Patient Name / DOB	Form Type / Physician	Service Requested	Status
04/09/2018 863742	Zzpmtest , Yellow 10/21/2017	Consult Service Request Testuser , Doctor9	Allergy & Immunology	Ordered

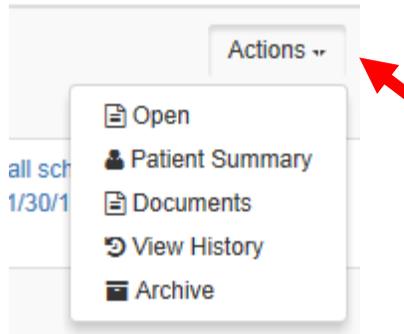
- Click the patient’s name to open the Patient Summary view (see resource page on Patient Summary).

Referral/Order Date / ID	Patient Name / DOB	Form Type / Physician	Service Requested	Status
04/09/2018 863742	Zzpmtest , Yellow 10/21/2017	Consult Service Request Testuser , Doctor9	Allergy & Immunology	Ordered

- The Form Type/Physician column will tell you if the order is for a consult or for a radiology exam as well as who the referring provider is.
- Service Requested will list the specialty clinic or exam that the patient is being referred for. If there are multiple consult requests on one order the Service Requested will say “Multiple”.

<input type="checkbox"/> 11/03/2017 857274	Zzpmtest , Kelsey 11/11/2011	Consult Service Request Sturdevant , Robert	1-Multiple
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- For each order there will be an Actions menu on the right-hand side where you can open the referral, view patient summary, documents and history.



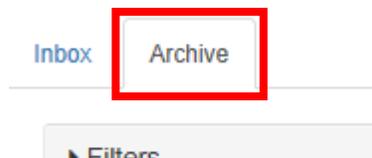
- To print an order from the inbox, select the patient by checking the box next to the order ID and click Print.



- This will open the print preview screen. Click  to print or  to save.
- You can print several orders at once by checking the box on multiple orders.
- You can also move orders to the Archive to remove them from your inbox. You may want to use this function after an appointment has been scheduled or if an order is canceled.
- To move an order into the Archive, select the order and click the Archive button.



- To view archived orders, click the Archive tab in the Orders Inbox.
- You can change the filters in the Archive to search and sort orders just as you would in the inbox.



- To remove the order from the archive and put it back in the inbox, select the order and click the Unarchive button.



## ➤ Order Status

- The order status identifies where an order currently resides in the workflow process. The status also indicates if the practice or the hospital can take action on an order and what action can be taken.
- The following list provides more detailed information on order status and the allowable actions that may be taken.

Order Status	Allowable Action
Ordered	Order submitted, but not yet filled; both hospital and practice can take action. Referral has not been processed by hospital.
In Process	Hospital is in the process of contacting the patient. Hospital has control of order, practice has read-only privileges and cannot take action.
Modified	Order has been modified.
Cancel Order	Practice request to hospital to cancel order.
Scheduled	An appointment has been scheduled. Hospital has control of order, practice has read-only privileges and cannot take action.
Hold	Practice has control of order; order has not been submitted and is considered to be in a "saved" state.
Hold - For Approval	Practice has control of the order and is awaiting approval before order is submitted.
Canceled	Controlling party canceled order.
Practice Action Requested	Hospital has returned order to practice for action; practice has control of order, hospital has read-only privileges and cannot take action.
Order Filled	Patient has had their appointment. Results are sent to practice and can be viewed in the Results Inbox.

- Track the status of an order by viewing the Status column in the Orders Inbox.

Referral/Order Date / ID	Patient Name / DOB	Form Type / Physician	Service Requested	Status
04/09/2018 📄 863742	Zzpmtest , Yellow 10/21/2017	Consult Service Request Testuser , Doctor9	Allergy & Immunology	Ordered

- After the appointment has been scheduled, the appointment date and time will be updated on the order form and the status will change from In Process to Scheduled.
- See the Scheduled For column for the appointment date.

Referral/Order Date / ID	Patient Name / DOB	Form Type / Physician	Service Requested	Status	Scheduled For
11/29/2017 857338	Zzpmtest , Abby 06/26/2017	Consult Service Request Sturdevant , Robert	1-Endocrine	Scheduled	11/30/2017

- To cancel an order, select the order by checking the box and click Change Status.



- Under the Status drop down menu, select Canceled.

### Change Status

Status

Select

Order Filled

Canceled

Patient Name	DOB	SSN	Service Requested
Zzpmtest, Orange	03/14/2017	0	Dental

- Click the Set Status button to cancel the order.

Status

Canceled

Patient Name	DOB	SSN	Service Requested	ICD	Status	Physician
Zzpmtest, Orange	03/14/2017	0	Dental		Ordered	ZZPMTEST Practice 1,

- You will see the confirmation window pop up, click OK and then close out of the Change Status screen.
- You can change the status of several orders at once by checking the box on multiple orders.

