

Orders Tracking: Orders, Authorizations, and Requisitions

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Agenda

Review Typical Workflows

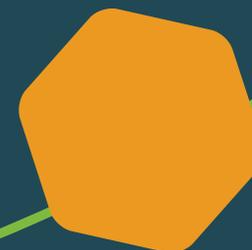
Resulting Requisitions

Tracking Requisitions

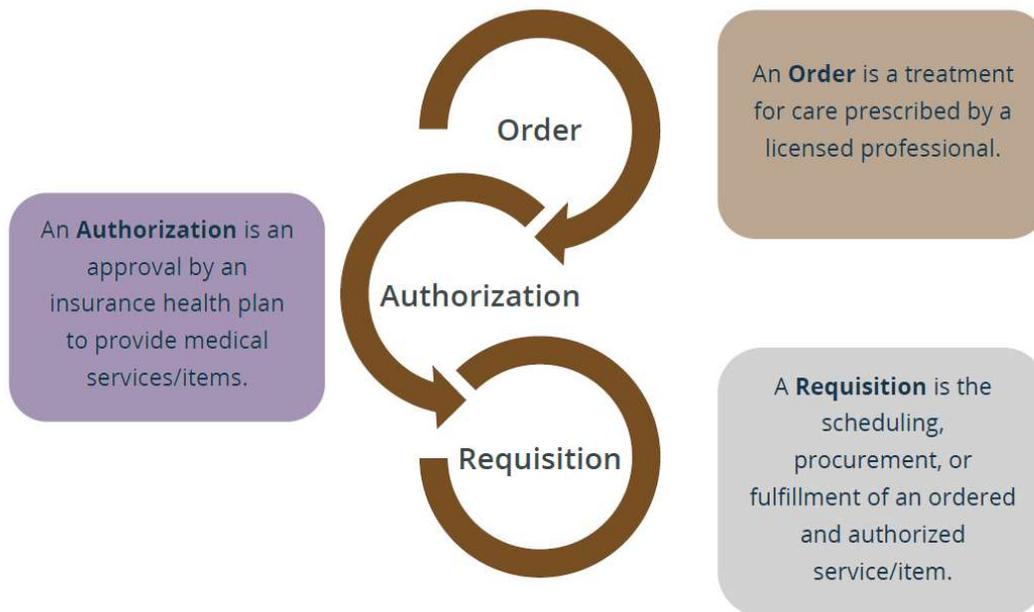
Tips and Tricks

Resources

Review Typical Workflows



Order Tracking: Order > Authorization > Requisition Common Workflows



Order Overview – Tie-Outs

- Creating an order is driven by your service catalog setup, which drives:
 - Order Specialty
 - Order Type / Unit
 - CMS Intervention Type
 - If a LIFEplan Attachment is required
 - If Dx is included on the LIFEplan problem, this code will flow to the Authorization
 - Default Order Details
 - If an Authorization will be created
 - If a Requisition will be created (and what type)
 - CPT / HCPCs / REV codes added to Authorization

Gastroenterology Consult

Specialty:
 Outpatient Specialist >> Gastroenterology

Type/Unit:
 Office Visit / Visit

CMS Intervention Type:

LIFEplan Location:
Problem(s) Problem: CHF (I50.9)
 Participant will follow prescribed treatment plan

Amount Requested:
 Visit(s) per every on

Order Details:

Authorization Type & Routing

Authorization type: Immediate	Benefit Plan: PACE Benefits
Create Requisition: <input checked="" type="checkbox"/>	Assign To: A Guy
Create Notification: <input checked="" type="checkbox"/>	Assign To: TruChart, Admin

Authorization Overview – Tie-Outs

- Many elements on the authorization are driven by the data entered in the Order
 - Notes from Requestor = Order Details
 - Diagnosis = LIFEplan Attachment
 - Services = Codes set in Service Catalog
 - Date of Service = Date of Service
 - End of Service = Inactivate Date or Expiration Date
 - Amount Requested & Units in Service Line = Amount Requested

The screenshot shows a web-based authorization form. Key elements are highlighted with red boxes:

- Notes from Requestor:** A text box containing "Optometry visit due to change in vision".
- Requesting Diagnosis:** A table with columns for Type, ICD10, Description, and Date Identified. The ICD10 code "H50.021" and the description "Monocular esotropia with A pattern, right eye" are highlighted.
- Service Details:**
 - Date of Service:** A date picker set to "08/03/2021".
 - End of Service:** A date picker set to "08/26/2021" with a dropdown menu showing "1 Month", "3 Months", "6 Months", and "1 Year".
 - Amount Requested:** A text box containing "3" with the unit "Visit(s)".
- Services:** A table with columns for Name, Date of Service, Code Type, Code (-EndCode) + Mods, and Quantity. The first row is highlighted:

Name	Date of Service	Code Type	Code (-EndCode) + Mods	Quantity
Optometry Consult		CPT	99201 99215	3 Units

Completing a Requisition – Contracted Services

- Important Fields for tracking purposes:
 - Vendor = who is providing the service
 - Date / Time = when is the service happening
 - **Results Expected check box** = are we expecting results to come back from the vendor (Drives status – Pending vs. NRE)
 - Services = Order Details OR Free Text

Services

Scheduled Service 1

Reason for Visit	Location	Date/Time/Duration
Quick Fill ▼ Psychiatry Follow-Up Treatment - Psych eval follow up <small>53/255 Characters</small>	University Psychiatry Associates 2210 East Illinois Avenue, Suite 401 Fresno, CA, 93701 Ph: 5593200580	08/03/2021 📅 at 12:30PM 🕒 <input type="checkbox"/> Pending time for 0 Hrs ▼ 45 Min ▼ <input type="checkbox"/> Pending Scheduling

Specialty/Vendor: Psychiatry ▼ Add Vendor Search Calendars... Add Calendar

University Psychiatry Assoc ▼

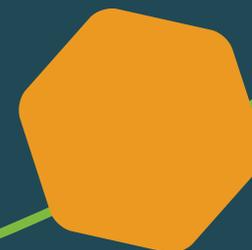
Type	Vendor	Service Detail
📄 Professional & Facility	University Psychiatry Associates 📄 <small>Phone: 5593200580 Fax:</small>	- No Providers for Vendor - 📄 - No Calendar - 📄 Services: Psychiatry Follow-Up Treatment - Psych eval follo Results Expected: <input checked="" type="checkbox"/> Qty: # <input type="text"/> of UNSPECIFIED ▼ at \$ <input type="text"/> Unit Price

Service Request ✕

Requisition

Req #:	0511-000-008-8171-1	Status:	PND
Date Requested:	8/3/2021	Type:	Psychiatry: Psych eval follow up
Requested by:	TruChart, Admin	Provider:	University Psychiatry Associates
Center:	TeeJayDee(TJD)		

Resulting Requisitions



Closing the Loop – Contracted Services

Using Scan Forms

- *Care Management > Document Management*
- Upload consult/results document
- Attach to the Requisition form
- Scan form is routed to user to review and complete the result
- Once scan form is signed and closed, requisition status is updated to FLD

Requisition

Req #: 0511-000-008-8159- **Status: FLD**
 Date Requested: 7/30/2021 **Type:** Podiatry: Debride nails and diabetic foot eval every 9 weeks
 Requested by: TruChart, Admin **Provider:** Good Foot Podiatry
 Center: TeeJayDee(TJD)

Authorized Order

Patient	Auth Date	Auth User	Authorized
ANDERSON, ANDREW	07-30-2021	TruChart, Admin	Authorized

Fulfillment

New

Progress Notes ▾

Status	Unit Quantity Fulfilled/Ordered	Items	Service Codes
FLD	1.0/ 1.0	Podiatry Services - Debride nails and diabetic foot eval every 9 weeks - Podiatry Services - Debride nails and diabetic foot eval every 9 weeks	

Unit Of Measure:

Results

Date Assigned	Date Updated	Type
7/30/2021 3:04 pm	7/30/2021 3:08 pm	Scan - Historical Records

Closing the Loop – Contracted Services

From PPT's Requisition Quick View

- *Participant Record > Requisitions Quick View*
- Select specialty link of requisition to be resulted
- Select “New” Fulfillment
- Progress note is created – follow link to Progress Note
- Document the fulfillment and mark as fulfilled

Service Request ×

Requisition

Req #: 0511-000-008-8159-3 Status: PND
 Date Requested: 7/30/2021 Type: Podiatry: Debride nails and diabetic foot eval every 9 weeks
 Requested by: TruChart, Admin Provider: Good Foot Podiatry
 Center: TeeJayDee(TJD)

Authorized Order

Patient	Auth Date	Auth User	Authorized
ANDERSON, ANDREW	07-30-2021	TruChart, Admin	Authorized

Fulfillment New Progress Notes ▼

Status	Unit Quantity Fulfilled/Ordered	Items	Service Codes
PND	0/ 1.0	Podiatry Services - Debride nails and diabetic foot eval every 9 weeks - Podiatry Services - Debride nails and diabetic foot eval every 9 weeks	

Unit Of Measure:

Results

Date Assigned	Date Updated	Type
8/2/2021 3:31 pm	Unsigned	Progress Notes

Invoices

Date Signed	Type	Date Received	Number	Amount
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Closing the Loop – Contracted Services

From Requisition Manifest

- Utilization Management > Requisition Manifest
- Filter on multiple options (Vendor, Status, Type, Start Date etc)
- From list of requisitions, select requisition # and complete process same as from the requisition Quick View

Center: All

Type: All

Status: All

Request start date: 07/01/2021

Organization: Good Foot Podiatry

Participant: Participant...

Req#:

Request end date: mm/dd/yyyy

Total number : 4

Date Req	Req#	Participant	Type	Status	Provider
7/30/2021	0511-000-008-8157-1	ANDERSON, ANDREW	Contracted Service - Podiatry	CNL	Good Foot Podiatry
7/30/2021	0511-000-008-8158-1	ANDERSON, ANDREW	Contracted Service - Podiatry	CNL	Good Foot Podiatry
7/30/2021	0511-000-008-8159-1	ANDERSON, ANDREW	Contracted Service - Podiatry Debride nails and diabetic foot eval every 9 weeks	FLD	Good Foot Podiatry
7/30/2021	0511-000-008-8159-3	ANDERSON, ANDREW	Contracted Service - Podiatry Debride nails and diabetic foot eval every 9 weeks	PND	Good Foot Podiatry

Closing the Loop – Procurements

From Package Arrival Tool

- Utilization Management > Package Arrival
- Utilize filters to search by Type, Status, Vendor, Participant, Dates
- Select check box to fulfill the procurement requisition

The screenshot shows the TruChart Utilization Management interface. The top navigation bar includes 'TruChart QA PAGE', 'Worklist 9', 'Utilization Management', and the user 'ANDERSON, ANDREW (11009)'. The main area contains filter fields for Center, Type, Status, Request start date (07/01/2021), Organization, Participant, Req#, and Request end date. A 'Find' button is located below these filters. The left sidebar has a 'Package Arrival' section with a checked checkbox. The main table displays procurement items with columns for Type/#, CR Status Qty, and Provider/Items. A red box highlights the 'CR Status Qty' column, showing two rows: '1.0 of 1.0 PND' and '3.0 of 3.0 PND'. A 'Save' button is at the bottom left, and a legend is at the bottom center.

Type/#	CR Status Qty	Provider/Items
Prosthetics/Orthotics (0511-000-008-8161-1)	<input checked="" type="checkbox"/> PND	LIFECARE SOLUTIONS
	1.0 of 1.0 <input type="checkbox"/> PND	1.0 Diabetic Shoes - A5500
	3.0 of 3.0 <input type="checkbox"/> PND	3.0 Custom Diabetic Inserts - A5513

Legend: USG-Unsigned, PND-Pending, NRE-No results expected, PRT-Partial, FLD-Fulfilled, PTC-Partially Cancelled, CNL-Cancelled, UNK-Unknown

Closing the Loop – Procurements

Other Options: Document Management *and* Requisition Quick View

- *Care Management > Document Management*
- Follow same steps as resulting a contracted service requisition from the Document Management Tool
 - *Participant Record > Requisitions*
- Follow same steps as resulting a contracted service requisition using the quick view

Results

Date Assigned	Date Updated	Type
8/2/2021 3:57 pm	8/2/2021 3:57 pm	Progress Notes

Results

Date Assigned	Date Updated	Type
8/2/2021 3:59 pm	8/2/2021 4:00 pm	Scan - Consult Notes

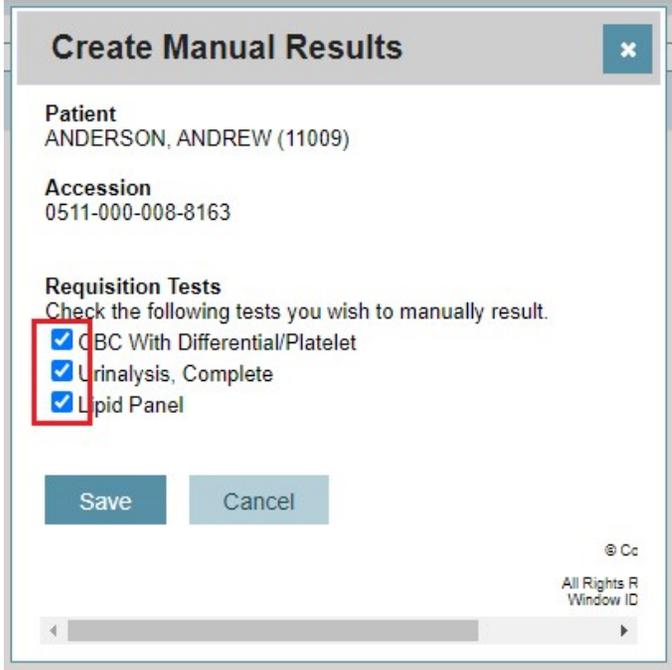
Results

Date Assigned	Date Updated	Type
	8/2/2021 3:51 pm	Package Arrival - Other

Closing the Loop – Labs

Manually - from Lab Reqs and Results

- *Care Management > Lab Reqs & Results*
- Navigate to beaker (Pending) Icon
- Select the correct order
- Select “Manual Result”
- Place check marks on what tests you are resulting
- Opens scan form in participants record
- Assign an appropriate MRC and Description
- Upload Results
- Sign and Close



Create Manual Results [X]

Patient
ANDERSON, ANDREW (11009)

Accession
0511-000-008-8163

Requisition Tests
Check the following tests you wish to manually result.

- CBC With Differential/Platelet
- Urinalysis, Complete
- Lipid Panel

Save **Cancel**

© Cc
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Window ID

Closing the Loop – Labs

Manually – from Lab Manifest

- *Care Management > Lab Manifest*
- Enter search parameters
- Select “Manual Result” from the Status column
- Place check marks on what tests you are resulting
- Opens scan form in participants record
- Assign an appropriate MRC and Description
- Upload Results
- Sign and Close

Scan Information		
Patient	Description	MRC
ANDERSON, ANDREW (11009)	<input type="text" value="Lab Results"/>	<input type="text" value="Lab Results"/>

Results Information	
Accession	Tests
0511-000-008-8164	Lipid Panel AChR Modulating Antibodies Urinalysis, Complete

Local File: TEST.pdf

Tracking Requisitions

Monitoring and Tracking Your Requisitions

Requisition Form Report

- *Care Management > Form Reports > Requisition Tab*
- Smart Table
 - Filter by 19 data points
- Export to CSV

Requisition Manifest

- *Utilization Management > Requisition Manifest*
- Available in v5
- Filter by Center, Type, Status, Vendor, Participant, Req #, Start/End Date
- Cannot export to CSV

Order Authorization Report

- *Utilization Management > Reports > Order Authorization*
- New in 22.08
- Combines Order, Authorization, and Requisition reports
- Smart Table
 - Filter by 38 data points
- Export to CSV

Monitoring and Tracking Your Requisitions

- Filter by Specialty
- Filter by Vendor
- Filter by Participant
- Filter by Estimated DOS (scheduled service on the requisition)
- Filter by Requisition Status
 - FLD = Fulfilled
 - PND = Pending
 - NRE = No Results Expected
 - CNL = Canceled

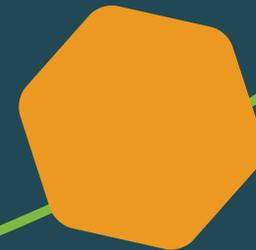
Requisitions | Encounters | Encounters Summary | Forms | Forms Summary | Orders

Last Generated: 8/3/2021 1:36 PM

Actions | Refresh Data | View: None Selected | Columns (19) | Records per page (20)

<input type="checkbox"/> Rows: 6	Participant	Reporting Type	Reporting Specialty	Vendor	Requisition Status	Req #	Estimated DOS	Units Fulfilled
<input type="checkbox"/> Action	ANDERSON, ANDREW (11009)	Outpatient Specialist	Podiatry	Good Foot Podiatry	FLD	0511-000-008-8158-1	07/30/2021	2
<input type="checkbox"/> Action	ANDERSON, ANDREW (11009)	Outpatient Specialist	Podiatry	Good Foot Podiatry	PND	0511-000-008-8168-1	08/03/2021	
<input type="checkbox"/> Action	HATCHER, MARY (RVT 07743633)	Outpatient Specialist	Podiatry	ROSELYN WROBLEWSKI	NRE	0511-000-008-8173-1	08/03/2021	
<input type="checkbox"/> Action	ANDERSON, ANDREW (11009)	Outpatient Specialist	Podiatry	Good Foot Podiatry	FLD	0511-000-008-8159-1	08/10/2021	1
<input type="checkbox"/> Action	ANDERSON, ANDREW (11009)	Outpatient Specialist	Podiatry	Good Foot Podiatry	CNL	0511-000-008-8157-1	08/18/2021	
<input type="checkbox"/> Action	ANDERSON, ANDREW (11009)	Outpatient Specialist	Podiatry	Good Foot Podiatry	PND	0511-000-008-8159-3	12/14/2021	

Tips and Tricks

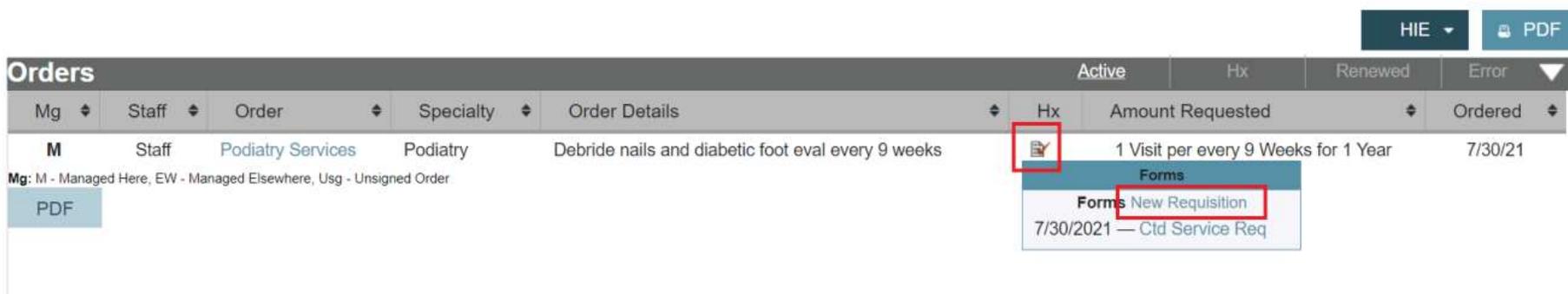


Tips and Tricks - Creating Multiple Requisitions from One Order

Example: Diabetic participant, PCP places order to see Podiatrist every 2 months

- Rather than creating a new Order > Auth > Req every 2 months, create 1 order and auth good for 1 year and spin off additional requisitions for scheduling purposes

ANDERSON, ANDREW (11009) - Orders



Orders

Active Hx Renewed Error

Mg	Staff	Order	Specialty	Order Details	Hx	Amount Requested	Ordered
M	Staff	Podiatry Services	Podiatry	Debride nails and diabetic foot eval every 9 weeks		1 Visit per every 9 Weeks for 1 Year	7/30/21

Mg: M - Managed Here, EW - Managed Elsewhere, Usg - Unsigned Order

PDF

Forms

Forms New Requisition

7/30/2021 — Ctd Service Req

Tips and Tricks - Resolving Common Scenarios

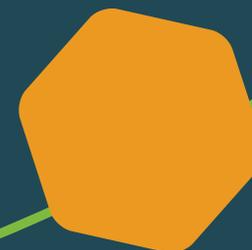
Correct Order was placed but needs to be canceled

- **Part of the order was completed**
 - Discontinue the Order
 - End the Authorization
 - Partially Result and Cancel the remainder of the Requisition
- **None of the order was completed**
 - Cancel the Authorization
 - This will cancel the Order and delete the *unsigned* requisition or cancel the *signed* requisition

Tips and Tricks - Resolving Common Scenarios

- **Order was placed by mistake**
 - EIE the Order
 - Cancel the Authorization (no services were rendered)
 - This will automatically delete the *unsigned* requisition OR cancel the *signed* requisition
 - Cancel any appointments made on calendar
- **Why can't I delete an Unsigned Authorization?**
 - Common Help Desk Question
 - You cannot delete an unsigned authorization that is tied to an Order
 - Need to make an appropriate determination (Canceled, Not Certified, Certified in Total, etc.)

Resources



Resources

HELP Documentation:

- Orders, Authorizations and Requisitions
- Uploading & Attaching Scans and Files
- Package Arrival Tip Sheet
- Lab Manifest and Lab Reqs and Results Tools

Account Analyst:

- Workflow questions / suggestions

Thank You

