

Order/Schedule/ Auth Workflow



Agenda

Taking the Order and:

Scheduling the Appointment

Authorizing the Order

Making the Transportation Request

Working it to Completion

Taking the Order and:



Scheduling the Appointment

Scheduling the Appointment

Prime Suite

Orders Tracking

Orders View Standing/Future Orders **Filter:**  

| <input type="checkbox"/> | Patient Name | Order Name | CPT | Service Provider | Ordering Physician | Order Date | Days Out | Results | F/U | Req | Status |
|--------------------------|------------------|-------------------|-------|------------------|--------------------|------------|----------|---------------------------|-----|---|---------|
| <input type="checkbox"/> | McIntosh, Deidre | CBC (automate ... | 85025 | Printer | admin. User MD | 04-27-2024 | -274 | View/Edit | |  | Ordered |
| <input type="checkbox"/> | James, Leo | Cardiology Co ... | CARDI | | Collins, Shari RD | 07-28-2023 | 0 | View/Edit | |  | Ordered |
| <input type="checkbox"/> | Jones, Margaret | Cardiology Co ... | CARDI | | Attard, Joseph MD | 07-28-2023 | 0 | View/Edit | |  | Ordered |
| <input type="checkbox"/> | James, Leo | Hemoglobin A1 ... | 83036 | | Delgado, Miguel MD | 07-27-2023 | 1 | View/Edit | |  | Ordered |
| <input type="checkbox"/> | James, Leo | Lipid panel (... | 82465 | | Physician, User MD | 07-27-2023 | 1 | View/Edit | |  | Ordered |
| <input type="checkbox"/> | James, Leo | Thyroid stimu ... | 84443 | | Delgado, Miguel MD | 07-27-2023 | 1 | View/Edit | |  | Ordered |
| <input type="checkbox"/> | James, Leo | CBC | 85027 | | Physician, User MD | 07-27-2023 | 1 | View/Edit | |  | Ordered |

Scheduling the Appointment

Greenway A/R Chart Registration Reporting Schedule System Help

Appointment Scheduling

Schedule Dashboard

Appointments **Wednesday, August 02, 2023**

Time **Outside**

North

12:15:00 PM No Template

12:30:00 PM

12:45:00 PM

01:00:00 PM

01:15:00 PM

01:30:00 PM CAR James, Leo

01:45:00 PM

02:00:00 PM

02:15:00 PM

02:30:00 PM

02:45:00 PM

03:00:00 PM

03:15:00 PM

03:30:00 PM

03:45:00 PM

04:00:00 PM

04:15:00 PM

Resources

- Home Care RN
- Home Care Tech
- Internal Specialists
- Nursing
- Nutrition
- Outside Specialists
- Outside
- Rehabilitative Therapies

Locations

- East (VM)
- North (VM)
- South (VM)
- West (VM)

Appointment Summary **Patient Information** **Block Time**

Patient Name: James, Leo **Date:** Wednesday, August 02, 2023

Appt. Type: Cardiology **Time:** 01:30 PM - 01:50 PM **Length:** 20 mins

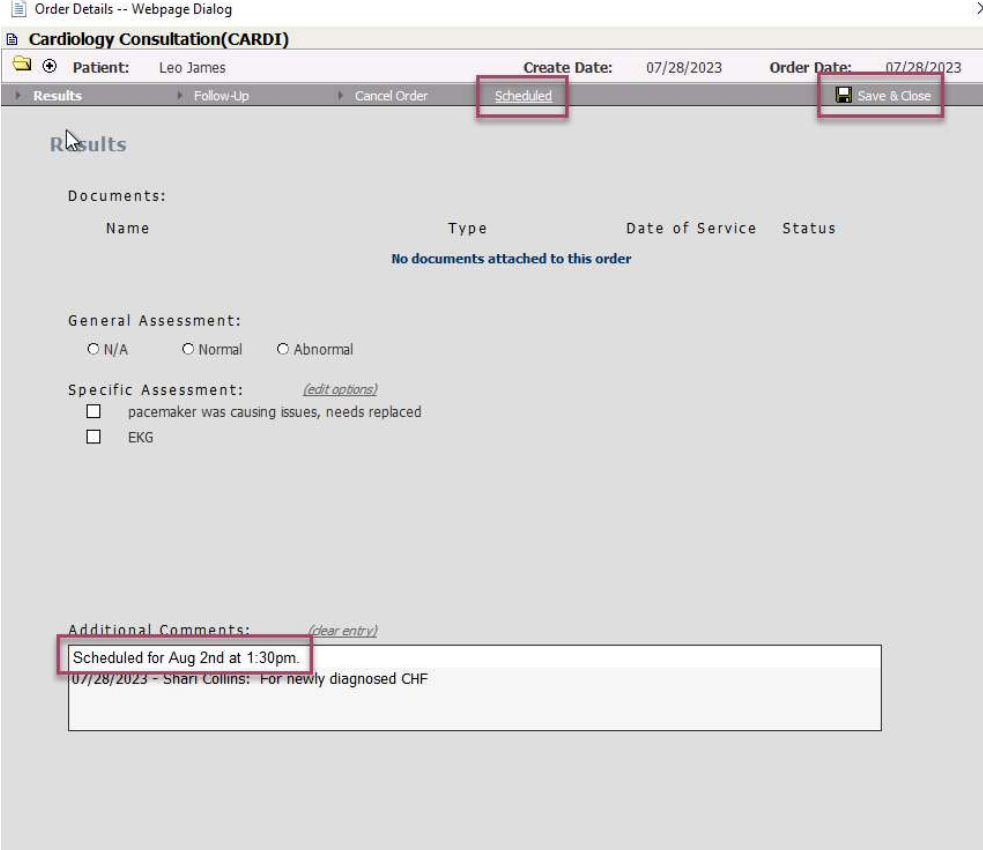
Authorization #: **Location:** North

Chief Complaint: Eval for newly diagnosed CHF. Transport needed. **Comments:** SC

*From Date : 08/02/2023 Mon. Tue. Wed. Thu. Fri. Sat. Sun.

*To Date : 08/16/2023 **View Schedules :** Extended Hours **Interval :** 15 Minutes [Schedule Wizard](#) [View Schedules](#)

Scheduling the Appointment



Order Details -- Webpage Dialog

Cardiology Consultation(CARDI)

Patient: Leo James Create Date: 07/28/2023 Order Date: 07/28/2023

Results Follow-Up Cancel Order **Scheduled** Save & Close

Results

Documents:

| Name | Type | Date of Service | Status |
|-------------------------------------|------|-----------------|--------|
| No documents attached to this order | | | |

General Assessment:

N/A Normal Abnormal

Specific Assessment: [\(edit options\)](#)

pacemaker was causing issues, needs replaced

EKG

Additional Comments: [\(clear entry\)](#)

Scheduled for Aug 2nd at 1:30pm.
07/28/2023 - Shari Collins: For newly diagnosed CHF

Taking the Order and:

Authorizing the Order

Authorizing the Order

My Links Setup

Pace Logic Links

- Search
- Info Page
- Center/Staff
- Schedule Calendar View
- Contact
- Assessments
- Care Plan
- Intervention Evaluations
- Enrollment
- Transportation Request Search
- Create Transportation Request
- **Authorize Orders**
- Today's Visits with Dropped HCC's

EireneRx Links

- Home
- Patient
- New Medication
- MAR

Updox

- Updox

CommonWell Health Alliance

- CommonWell Enroll Participant

PACElogic

orders archive checked search reset authorization archive save save & print

center: All Date: to PCP Only

participant: type name or id to search type: All New Only

| <input type="checkbox"/> | Order Date | Participant | Order | Text | Status |
|-------------------------------------|------------|--------------------------|--------------------------------------|---|-----------|
| <input type="checkbox"/> | 7/28/2023 | Jones, Margaret (1368) | Cardiology Consultation (CARDI) | | ordered |
| <input type="checkbox"/> | 7/28/2023 | O'Conner, Brian (1358) | Cardiology Consultation (CARDI) | Scheduled for 7/28/2023 | returned |
| <input checked="" type="checkbox"/> | 7/28/2023 | James, Leo (1413) | Cardiology Consultation (CARDI) | For newly diagnosed CHF | scheduled |
| <input type="checkbox"/> | 7/27/2023 | James, Leo (1413) | Hemoglobin A1C (83036) | | ordered |
| <input type="checkbox"/> | 7/27/2023 | James, Leo (1413) | Lipid panel (fasting) (82465) | | ordered |
| <input type="checkbox"/> | 7/27/2023 | James, Leo (1413) | Abdominal CT (with contrast) (74160) | | ordered |
| <input type="checkbox"/> | 7/27/2023 | Jones, Margaret (1368) | Cardiology Consultation (CARDI) | ..hugufg | pending |
| <input type="checkbox"/> | 7/26/2023 | Test, Patient (1020) | Shingrix Administration (90736) | | ordered |
| <input type="checkbox"/> | 7/14/2023 | McIntosh, Deirdre (1367) | Dental Consultation (DENTA) | | ordered |
| <input type="checkbox"/> | 7/14/2023 | Achbach, Gary (1015) | Cardiology Consultation (CARDI) | | ordered |
| <input type="checkbox"/> | 7/12/2023 | James, Leo (1413) | Hemoglobin (Hgb) (85018) | | ordered |
| <input type="checkbox"/> | 7/11/2023 | O'Conner, Brian (1358) | Podiatry Consultation (PODIA) | Approving 6 visit with the provider/ weekly visits. | ordered |

participant: Leo James

order: CARDI - Cardiology Consultation

diagnosis: CHF (congestive heart failure) -Y 85

details: For newly diagnosed CHF

expected service date: 7/28/2023

effective date: 8/2/2023

end date: 8/2/2023

description: Please eval for newly diagnosed CHF

service units: 1.00

authorization code: OP

service code: CR11

referrer: Delgado, Miguel

referred to: Hill, Roger (Cardiology) [v]

schedule appointment:

Page: 1 of 100 | Records: 1,192

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Authorizing the Order

Cognify
343 3rd Street, Suite 202B
Laguna Beach, CA 92651

Authorization #
PL-5040

Referred To: Hill, Roger **Referred From:** Delgado, Miguel
Phone: **Fax:**

Patient: James, Leo **Date of Birth:** 4/6/1940
Address: 1133 Orange St. **Member ID:** 1413
Jacksonville, FL 32222 **Phone:** (904) 282-8282

Diagnosis: CHF (congestive heart failure)
-Y 85 **Visits Approved:** 1
Effective: 8/2/2023
Expires: 8/2/2023

Reason: Phys. Svc. - Cardiology
Please eval for newly diagnosed CHF

Consult Work-Up Treat

Records Attached: _____

Provider's Finding/Recommendations (report to follow)

Date: _____ **Signature:** _____

Please return PACE Physician Referral Form with written recommendations to patient upon end of appointment to be returned to PACE.

Please do not schedule future appointments with the patient. PACE will contact you to schedule all future appointments upon receipt of consult notes.

Please fax consult notes to XXX-XXX-XXXX upon completion. Payment for services cannot be released until consult notes are received.

Order Details -- Webpage Dialog

Cardiology Consultation(CARDI)

Patient: Leo James **Create Date:** 07/28/2023 **Order Date:** 07/28/2023

Results Follow-Up Cancel Order Scheduled **Save & Close**

Results

Documents:

| Name | Type | Date of Service | Status |
|-------------------------------------|------|-----------------|--------|
| No documents attached to this order | | | |

General Assessment:

N/A Normal Abnormal

Specific Assessment: [\(edit options\)](#)

pacemaker was causing issues, needs replaced

EKG

Additional Comments: [\(clear entry\)](#)

Auth #5040

07/30/2023 - Shari Collins: Scheduled for Aug 2nd at 1:30pm.
07/28/2023 - Shari Collins: For newly diagnosed CHF

Authorizing the Order

PACElogic << Search Participants... (10)

Search

Program >

Participant >

Encounter >

Authorizations

Claims

DataPACE

EDS

RAPS

PDE

Financial >

Transportation >

DME >

Quality >

Reporting >

Admin >

Config >

Help >

Authorizations

center: Any Center

start: 7/1/2023 end: 8/5/2023

auth #:

unlinked: no provider:

participant: Any Participant

provider: Any Provider

23 items per page 1 - 8 of 8 items

columns save view manage views View: Default

Drag a column header and drop it here to group by that column

| Auth # | Participant | Auth Type | Active | Expected D... | Effective Date | Expiration ... | Provider | Referrer | Service | Diagnosis Code |
|---------|------------------|---------------------|--------|---------------|----------------|----------------|--------------------------------------|--------------------|---|----------------|
| PL-5038 | Achbach, Gary | Transportation | true | 7/19/2023 | 7/19/2023 | 7/19/2023 | Abbicus,James | Delgado,Miguel | Cardiovascular | E11.9 |
| PL-4906 | Aimes, Aaron | Outpatient Services | false | 1/27/2026 | 5/11/2022 | 5/31/2022 | Affordable Medical, | Brummer,Joe | Assisted Living - Respite/Temporary | |
| PL-5040 | James, Leo | Outpatient Services | true | 7/28/2023 | 8/2/2023 | 8/2/2023 | Hill,Roger | Delgado,Miguel | Phys. Svc. - Cardiology | I50.9 |
| PL-5039 | James, Leo | Dialysis | true | 7/12/2023 | 7/19/2023 | 7/19/2023 | Abbicus,James | Delgado,Miguel | Assisted Living - Permanent Placement | I50.9 |
| PL-5036 | McIntosh, Deidre | Other Services | true | 7/14/2023 | 7/13/2023 | 7/20/2023 | Abraham,Carl | Sessions,Stephanie | HOME HEALTH NUTRITION/DIETARY | |
| PL-5035 | McIntosh, Deidre | Outpatient Services | true | 7/14/2023 | 7/13/2023 | 7/21/2023 | Arkansas Methodist Home Health, | Sessions,Stephanie | In-Home Supportive Care (Personal Aide) | |
| PL-5034 | McIntosh, Deidre | Other Services | true | 7/14/2023 | 7/13/2023 | 7/21/2023 | Absolute Care Management Corporatio, | Sessions,Stephanie | Cardiovascular | |
| PL-5033 | O'Conner, Brian | Outpatient Services | true | 7/21/2023 | 7/21/2023 | 7/21/2023 | Hayes,Walter | Hohmann,Joy | Phys. Svc. - Podiatry | M79.672 |

Taking the Order and:

Scheduling the Transportation Request

Scheduling the Transportation Request

PACElogic

Search

Program <

Participant <

Encounter <

Financial <

Transportation >

New

History

DME <

Quality <

Reporting <

Admin <

Config <

Help <

transportation

Request Information: Step 1 of 5

request date: 7/30/2023

requested by: Collins, Shari

request type: Outside Appointment

transport date: 8/2/2023 Repeat...

participant: James, Leo (1413) (Enrolled)

ambulation / transportation info

seat belt lock:

gait belt:

do not cancel:

cannot leave alone:

wander risk:

bed bug:

blind / visually impaired:

diabetic:

translator needed:

escort required:

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transportation

Pickup from Location: Step 2 of 5

location: Physical

Center: < Please Choose >

relationship: < Please Choose >

facility: < Please Choose >

room:

address 1: 1133 Orange St.

address 2:

city: Jacksonville state: FL zip: 32222

home phone: (904) 282-8282

Scheduling the Transportation Request



transportation

Transport to Location: Step 3 of 5

Tech Needed Paperwork Needed Family Escort Needed

provider:

provider name: provider phone:

department:

floor:

time:

address 1:

address 2:

city: state: zip:

special instructions:

transportation

Driver Information: Step 4 of 5

additional information:

Scheduling the Transportation Request



transportation

Confirmation: Step 5 of 5

James, Leo (1413) (Enrolled) on 8/2/2023 for Outside Appointment

Participant Name: James, Leo (1413) (Enrolled)
Transport Date: 8/2/2023
Request Type: Outside Appointment

Pickup from Location: 1133 Orange St.
Jacksonville, FL 32222
(904) 282-8282

Transport to Location: Provider Name: Roger Hill
Provider Phone: () -
Floor: 4
Department: Cardiology
Tech Needed: Yes
Time: 1:30 PM
4567 Cardio Dr.
Long Beach, CA 90712

Additional Information:

[previous](#) [create request](#)

Scheduling the Transportation Request

PACElogic << Search Participants... (103)

Search

- Program >
- Participant >
- Encounter >
- Financial >
- Transportation >

New

- History**
- DME >
- Quality >
- Reporting >
- Admin >
- Config >
- Help >

Transportation History search reset new reports exports

Center: Any Center Start Date: to

Participant: Any Participant Requested By: Any Requestor

1 - 23 of 270 items

columns save view manage views View: Default

Drag a column header and drop it here to group by that column

| Start Date | Time | Participant | Status | Description | Requested... |
|------------|----------|-----------------|-----------|--|---------------------|
| 8/3/2023 | 01:30 PM | James, Leo | Requested | East Transportation Request for James, Leo on 8/3/2023 | Collins, Shari |
| 8/2/2023 | 01:30 PM | James, Leo | Requested | North Transportation Request for James, Leo on 8/2/2023 | Collins, Shari |
| 7/3/2023 | 10:00 AM | Jones, Margaret | Canceled | North Transportation Request for Jones, Margaret on 7/3/2023 | Training, PACeLogic |
| 6/30/2023 | 09:00 AM | LaBelle, Patti | Requested | East Transportation Request for LaBelle, Patti on 6/30/2023 | Fields, Tarnesha |

PACElogic << Search Participants... (103)

Search

- Program >
- Participant >
- Encounter >
- Financial >
- Transportation >

New

- History**
- DME >
- Quality >
- Reporting >
- Admin >
- Config >
- Help >

Transportation History search reset new reports exports

Center: Any Center Start Date: to

Participant: Any Participant Requested By: Any Requestor

1 - 23 of 270 items

columns save view manage views View: Default

Drag a column header and drop it here to group by that column

| Start Date | Time | Participant | Status | Description | Requested... |
|------------|----------|-----------------|-----------|--|---------------------|
| 8/3/2023 | 01:30 PM | James, Leo | Requested | East Transportation Request for James, Leo on 8/3/2023 | Collins, Shari |
| 8/2/2023 | 01:30 PM | James, Leo | Requested | North Transportation Request for James, Leo on 8/2/2023 | Collins, Shari |
| 7/3/2023 | 10:00 AM | Jones, Margaret | Canceled | North Transportation Request for Jones, Margaret on 7/3/2023 | Training, PACeLogic |
| 6/30/2023 | 09:00 AM | LaBelle, Patti | Requested | East Transportation Request for LaBelle, Patti on 6/30/2023 | Fields, Tarnesha |

Taking the Order and:

Working it to Completion

Working the Order to Completion

Order Details -- Webpage Dialog

Cardiology Consultation(CARDI)

Patient: Leo James Create Date: 07/28/2023 Order Date: 07/28/2023

Results Follow-Up Cancel Order Pending Save & Close

Results

Documents:

| Name | Type | Date of Service | Status |
|-------------------------------------|------|-----------------|--------|
| No documents attached to this order | | | |

General Assessment:

N/A Normal Abnormal

Specific Assessment: [\(edit options\)](#)

pacemaker was causing issues, needs replaced

EKG

Additional Comments: [\(clear entry\)](#)

Appointment happened as scheduled on 8/2/23. Awaiting results.

07/30/2023 - Shari Collins: Auth #5040
07/30/2023 - Shari Collins: Scheduled for Aug 2nd at 1:30pm.
07/28/2023 - Shari Collins: For newly diagnosed CHF

Working the Order to Completion





Q&A



Thank You

