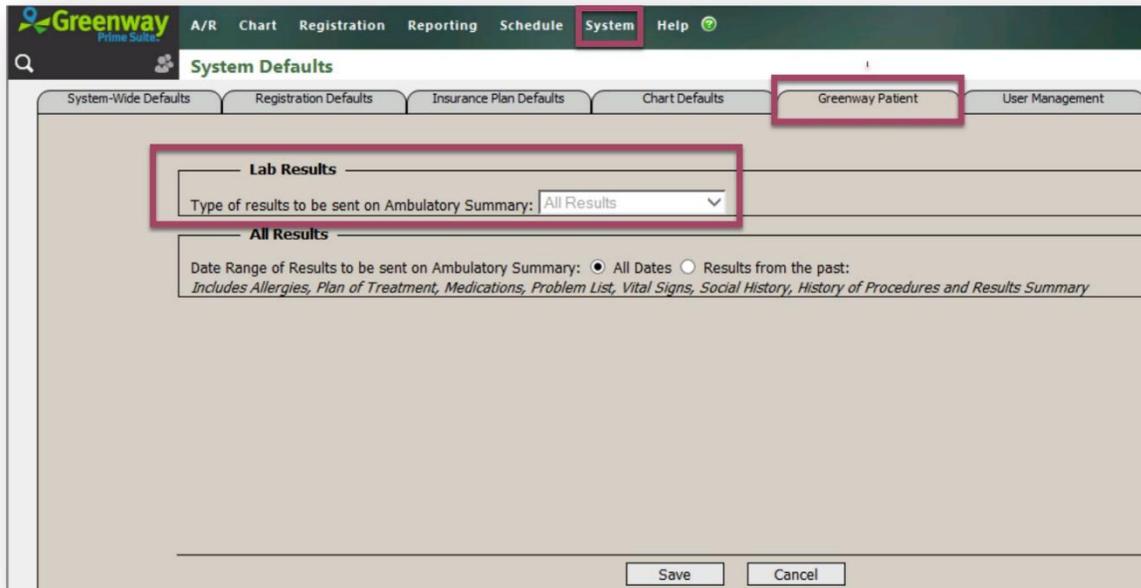


Hold Results Until Review Check Box

JOB AID

Details

After upgrading to Prime Suite Version 21.0, all electronic/interface results will default to automatically go to the patient portal or CCD as soon as the results are received. Users with the appropriate permissions may set specific concepts to be held at the practice level. Additionally, a provider can individually set an order to be held. Prime Suite has a new function around sharing lab results to the Greenway Patient Portal and CCDAs. When users upgrade to Prime Suite Version 21.0, this system default is set to **All Results**. If you have a setting selected prior to upgrading to Prime Suite Version 21.0, the setting is updated to **All Results** for you. This setting is on the **Greenway Patient** tab under **System Defaults**.

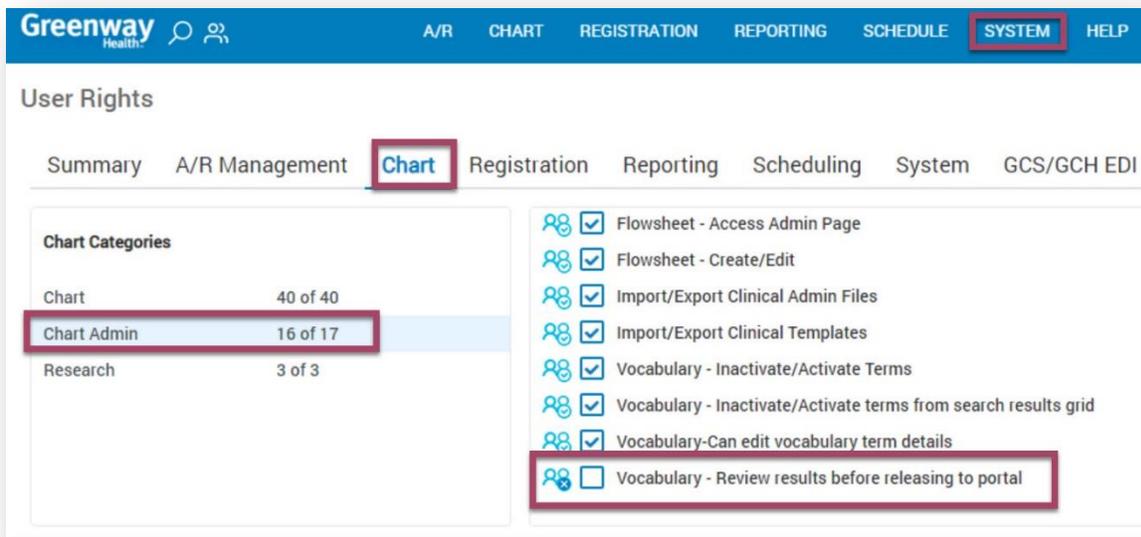


The screenshot shows the Greenway Prime Suite interface. The top navigation bar includes 'A/R', 'Chart', 'Registration', 'Reporting', 'Schedule', 'System', and 'Help'. The 'System' menu is highlighted. Below the navigation bar, the 'System Defaults' page is displayed. The 'Greenway Patient' tab is selected. The 'Lab Results' section is highlighted with a red box, showing a dropdown menu set to 'All Results'. The 'All Results' section is also highlighted with a red box, showing radio buttons for 'All Dates' (selected) and 'Results from the past'. A 'Save' button and a 'Cancel' button are visible at the bottom of the form.

This functionality sets the system default to send all electronic/interface lab results to Greenway Patient Portal and CCDA. These changes are in place to prevent information blocking and ensure regulatory compliance with the 21st Century Cures Act.

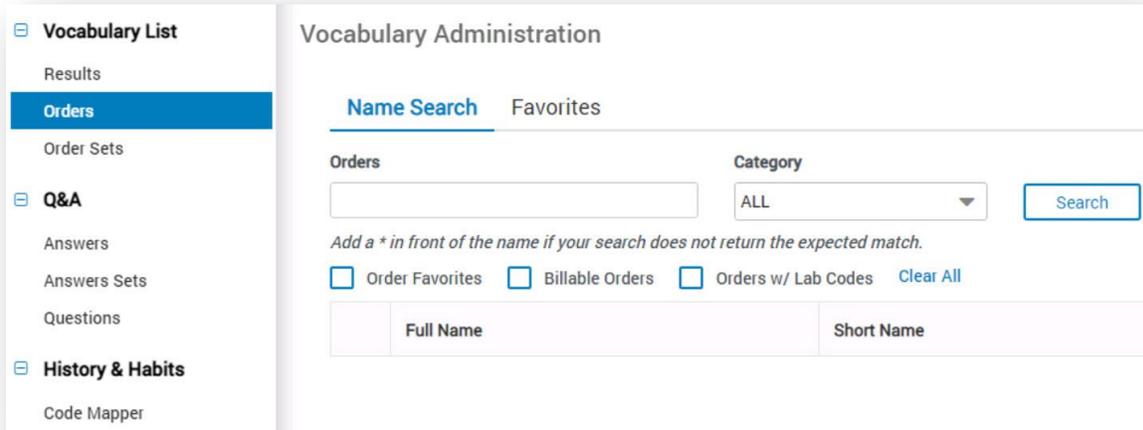
New User Right for Reviewing Results Before Releasing to Portal

This is a new user right for practices who need to choose if they want to review results before the results are sent to the portal. On the **User Rights** page (**System > User Rights > Chart > Chart Admin**), users can choose **Vocabulary - Review results before releasing to portal**. Selecting this option holds results at the concept level for the entire practice until users review and send results to the patient portal.

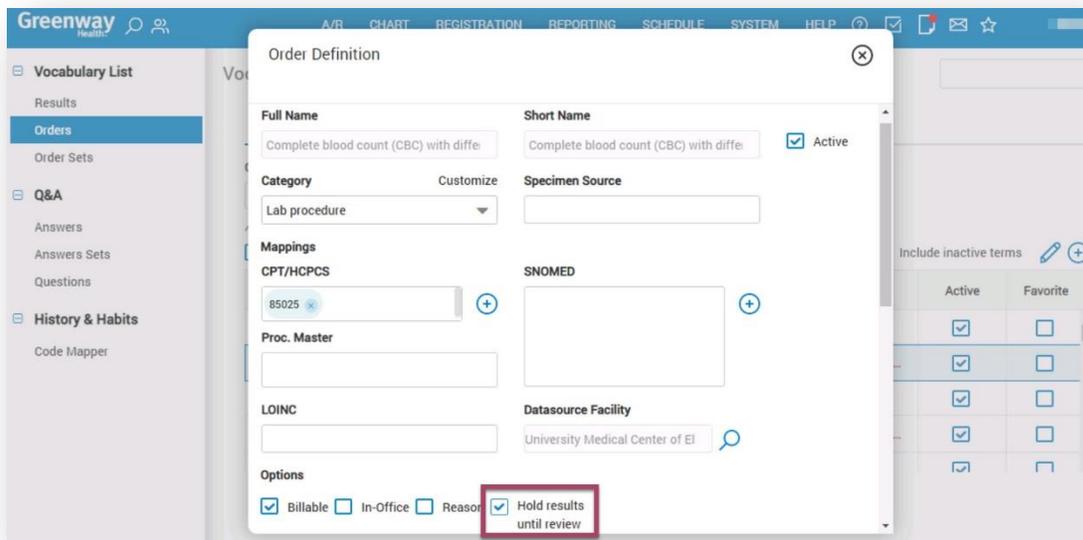


Hold Results After You Have the Right Enabled

1. From the **Chart** menu, select **Vocabulary Admin**.
2. Select **Orders**.
3. Enter an order number or name into the Name Search.



4. Double-click the name of the result you want to hold OR select the **View/Edit** icon .
 - ❖ If you need to add an order, select the **Enter a new vocabulary** term icon .
5. To hold results before sending them to the patient portal, select the **Hold results until review** check box in the **Order Definition** window.

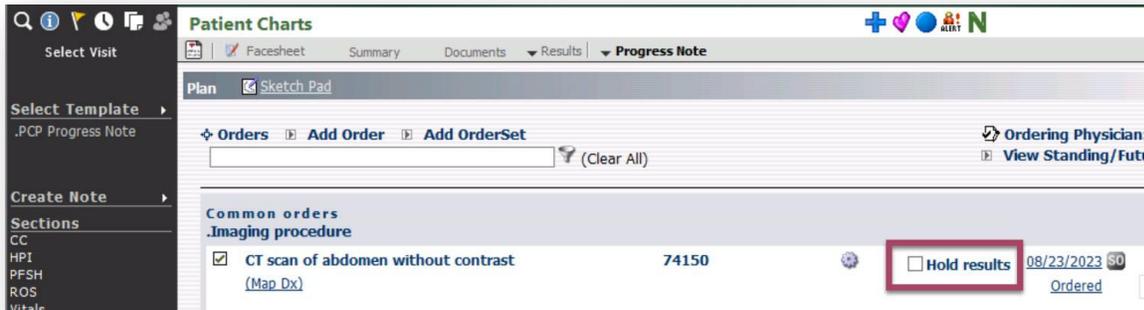


- ❖ Selecting the **Hold results until review** check box will set the concept for the practice overall. Please note this is not required as Care Providers can elect to hold or release results at point of care when ordering the labs.

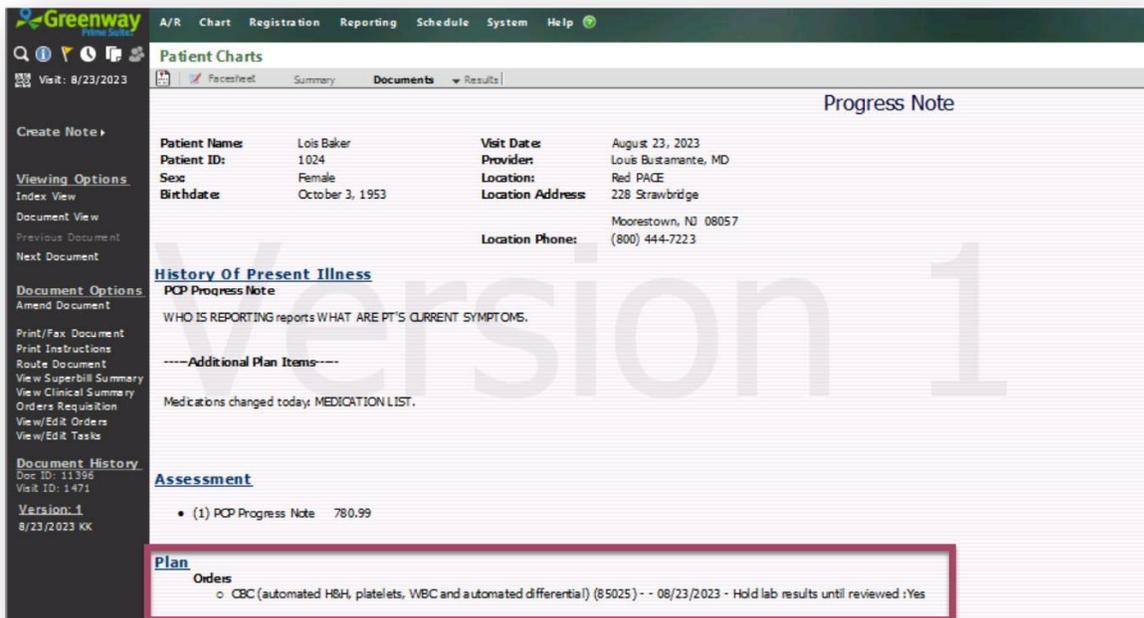
Change the Hold Results Setting for an Individual Patient

In the **Plan** section of a note, users can change this setting based on an individual patient.

1. Select the **Hold results** check box to withhold results from the portal until the results are reviewed and signed.



After users sign and save the note, the selections for the Hold results check box are listed:



If the order is reviewed and the **Vocabulary - Review results before releasing to portal** box is checked, the results will be sent to the portal. Results are sent even if the **Hold results** box in the Plan section is checked. Typically, orders are considered reviewed when everything that needs to be done to that order has been done. Once an order is marked as **Reviewed**, the results will be sent to the portal or CCDA.

If the order is returned and the **Vocabulary - Review results before releasing to portal** box is unchecked, results will be sent to the portal. However, if you check the **Hold results** box in the Plan section, the results will not be sent to the portal for that patient **ONLY**. In this case, the patient will receive their results immediately.

If the order is marked as returned, the results will go to the portal or CCDA if the order is not marked to hold results in the Plan section of a note. If the **Hold Results** box was checked in the **Plan** section of a note, the results will be held until the order is in a Reviewed status.

Status of the Order > Hold Results Box Status	Sent to Portal?
Reviewed > Checked	Yes
Reviewed > Unchecked	Yes
Returned > Checked	No
Returned > Unchecked	Yes