

Hold Results Until Review Check Box

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**.

Se Greenway	A/R Chart Registration Reporting Schedule System Help 😨		
Q. 2	System Defaults		
System-Wide Def	ults Registration Defaults Insurance Plan Defaults Chart Defaults	Greenway Patient	User Management
	Lab Results		
L	Type of results to be sent on Ambulatory Summary: All Results		
	All Results		
	Date Range of Results to be sent on Ambulatory Summary: ● All Dates ○ Results from Includes Alleraies. Plan of Treatment. Medications. Problem List, Vital Signs, Social Histor	n the past: v, History of Procedures and	Results Summarv
	Save	ancel	

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.

Greenway උ ළ	A/R (CHART REG	ISTRATION	REPORTING	SCHEDULE	SYSTEM	HELP
User Rights							
Summary A/R Management	hart Re	gistration	Reporting	Schedulin	g System	GCS/G	CH EDI
Chart Categories		ନ୍ଧ ୮ ୧୫ ୮	Flowsheet - Ac Flowsheet - Cre	ccess Admin Pag eate/Edit	e		
Chart 40 of 40		R8 🗹	Import/Export	Clinical Admin F	iles		
Chart Admin 16 of 17		28 🗹	Import/Export	Clinical Template	es		
Research 3 of 3		2 8 🗹	Vocabulary - In	activate/Activat	e Terms		
		R8 🗹	Vocabulary - In	activate/Activat	e terms from se	arch results g	Irid
		<u>88</u>	Vocabulary-Ca	n edit vocabular	y term details		
		P& 🗆	Vocabulary - R	eview results be	fore releasing to	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.

	Vocabulary List	Vocabulary Admir	stration
	Results		
	Orders	Name Search	Favorites
	Order Sets	Orders	Category
Θ	Q&A		ALL Search
	Answers	Add a * in front of the r	me if your search does not return the expected match.
	Answers Sets	Order Favorites	Billable Orders Orders w/ Lab Codes Clear All
	Questions	Full Name	Short Name
	Liston & Lishita		
Θ	HISTORY & Habits		

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

	Full Name		Short Name			*	
Orders - Order Sets (- Complete blood cou	nt (CBC) with diffe	Complete blood count (CBC) with diffe		Active		
	Category	Customize	Specimen Source				
Q&A	Lab procedure	-					
Answers Answers Sets Questions	Mappings					Include inactive te	rms 1 (+
	CPT/HCPCS	SNOMED			Activa	Esvorite	
History & Habits		(\mathbf{f})		Ŧ		Active	ravoine
Code Manner							
Code Mapper							
	LOINC		Datasource Facility				
	Lonito			0			
			University Medical Center of El				

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.

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Select Visit	📴 🛛 🕅 Facesheet Summary Documents 🗸 Results 🖌 Progress Note	
	Plan 📓 Sketch Pad	
Select Template 🔸		
.PCP Progress Note	💠 Orders 🕑 Add Order 🕑 Add OrderSet	Ordering Physician:
	9 (Clear All)	View Standing/Futu
Create Note 🔶 🕨		
Sections	Common orders Imaging procedure	
cc	maging procedure	
HPI	CT scan of abdomen without contrast 74150	Hold results 08/23/2023 SO
PFSH	(Map Dx)	Ordered
ROS		

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

Greenway	A/R Chart Regi	stration Reporting Schedul	e System Help 💿		A REAL PROPERTY OF A READ PROPERTY OF A REAL PROPER		
Q 🕕 🍸 🕓 🖪 🌋	Patient Charts						
题 Visit: 8/23/2023	Facesheet	Summary Documents +	Results				
Create Note+	Patient Name:	Lois Baker	Visit Date:	August 23, 2023	Progress Note		
	Patient ID:	1024	Provider:	Louis Bustamante, MD			
Viewing Options Index View	Sex: Birthdate:	Female October 3, 1953	Location: Location Address	Red PACE 228 Strawbridge			
Document View				Moorestown, NJ 08057			
			Location Phone:	(800) 444-7223			
Next Document							
Document Options Amend Document Print/Fax Document Print Instructions Route Document View Superbill Summary View Clinical Summary Orders Requisition View/Edit Taska	History Of Pre POP Progress Note WHO IS REPORTING Additional Plan Medications changed	sent IIIness reports WHAT ARE PT'S QURRENT ! I Items today: MEDICATION LIST.	SYMPTOMS.				
Document History Doc ID: 11396 Visit ID: 1471	Assessment	Assessment					
Version: 1 8/23/2023 KK	(1) PCP Progre	ss Note 780.99			4		
	Plan Orders o CBC (au	tomated H&H, platelets, WBC and a	automated differential) ((85025) 08/23/2023 - Hold lab	results until reviewed :Yes		

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.

Sent to Portan
Yes
Yes
No
Yes
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