ORDERS MANAGEMENT OVERVIEW QUICK REFERENCE GUIDE

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ORDERS MANAGEMENT OVERVIEW SUMMARY

View/Orders Management

The Orders Management Center is split up into four sections:

1. Orders Pending Co-Signature - Orders that need a co-signature because the user who signed the order requires a co-signature (permissions-based).

2. Orders to Be Sent - Orders that are ready to be sent to the physician for signature, either manually or electronically. This is where orders can be printed, mark orders as sent to Physician, and send orders electronically.

3. Orders Pending MD Signature – Orders that have been sent to the physician but not yet received back from the physician signed. Once orders are received by the physician, navigate to this section to mark the orders as received.

4. Orders History – Orders in every status are housed. To view the status of an order, update the signature or received date, or print an order.

ORDERS PENDING CO-SIGNATURE

View/Orders Management/Orders Pending Co-Signature

1. Choose filters.
2. Select **Generate**.
3. Select order hyperlink under column **Type**.
4. Select **Co-Sign.**
5. Enter Signature & Date.
6. Select either **Co-Sign** or **Co-Sign and Approve** (permissions based).
7. If Co-Sign only, order goes to Quality Assurance (QA) Center.

ORDERS TO BE SENT

View/Orders Management/Orders to be Sent

Once orders are approved, the Orders to Be Sent screen will populate the orders ready to be sent to the physician one of two ways; either manually (fax, mail, deliver) or electronically through the physician portal.

Send Orders Electronically

NOTE: This feature is only available for Physicians who are set up to sign orders electronically, contact the Admin to set up these Physicians.

1. Choose Branch, Filter by “Electronic Orders,” specify date range, and status if applicable.
2. Select **Generate**.
3. Select/multi-select the checkboxes next to order.
4. Select **Send Electronically**.
5. Confirmation appears in top right corner that orders were sent successfully.
6. Orders move to the Orders Pending Signature sub-menu. It’s also updated to “Sent to Physician (Electronically)” status in patient chart.

Send Orders Manually

1. Choose Branch, Filter by “Manual Orders,” specify date range, and status if applicable.
2. Select **Generate**.
3. Select/multi-select the checkboxes next to order.
4. Select the **Send Manually**.
5. Confirmation appears in top right corner that orders were sent successfully.
6. Orders move to the Orders Pending Signature sub-menu. It’s also updated to a “Sent to Physician (Manually)” status in patient chart.

ORDERS PENDING MD SIGNATURE

View/Orders Management/Orders Pending MD Signature

To track outstanding orders previously sent to the physician or to mark an order as received and/or signed, access Orders Pending MD Signature.

Mark an Order As Received

1. Choose Branch, enter Date Range (auto-generates 60 days) and patient Status.
2. Select **Generate**.
3. Start typing any Order number, Patient, Payor, Type, Internal Referral Source or Physician name in the free text space to narrow down.

a. **Optional***:* If the order is manual (fax, mail, delivered) scan the order in and upload to patient chart: *Patients/Patient Charts/Upload Document Tab/New Document*

For Multiple Orders

1. Check the box(es) next to the order(s).
2. Select **Receive Order.**
3. Confirm Received and Physician Signature Date.
4. Select **Mark as Received**.
5. Confirmation appears in top right corner that orders were marked as received.

For Single Order

1. Select **Receive Order** hyperlink to the right of order.
2. Enter Received Date and MD Sign Date.
3. Select **Update** hyperlink.
4. Confirmation appears in top right corner that orders were marked as received.

ORDERS HISTORY

View/Orders Management/Orders History

All orders in every status. Useful to find the status of the order, update received/signed dates, reprint orders, and see orders with returned physician signature.

1. Choose Branch, Date Range (defaults past 60 days), patient Status.
2. Select **Generate**.
3. Select **Edit** hyperlink.
4. Update Sent, Received and/or Physician Signature Date.
5. Select **Update**.
6. Optional: Print or Export to Excel.

PHYSICIAN ORDER HISTORY

Reports/Report Center/Clinical Reports/Physician Order History

For only electronic orders that have been sent:

1. Choose Branch, change the Status to “Sent to Physician (Electronically)” and choose Date Range.
2. Select **Generate Report**.
3. The orders displayed will be those that are in a Sent to Physician (Electronically) status.

HELP

Our Help Center is a great resource available 24/7. Here, you can get answers to frequently asked questions or watch videos on all our Axxess products. It can be accessed by going to *Help/Support & Training/Help Center* or https://www.axxess.com/help/