



Diagnostic Testing User Guide

Spring 2017 Release



Legal Notices

©2017 by Brightree LLC

All Rights Reserved.

Disclaimer

All information presented herein is solely intended for employees of Brightree customers in connection with their use of the Brightree application as a supplement to training, and to illustrate how Brightree can be utilized by a typical company. Statements and examples used in the presentation are not intended to contradict or in any way override the written or verbal instructions of the customer ("Licensee"). The Licensee is responsible for establishing its own practices and procedures and making each of their employees familiar with them, including those related to the use of the Brightree application. Nothing in this training material should be construed to be instructing any Licensee employee to violate any Federal, State, or other jurisdictional law or regulation; or to violate any aspect of the Licensee's established practices and procedures.

The information contained in this document is the copyrighted property of Brightree LLC. No part of this document may be reproduced, republished, translated, stored in a retrieval system, or transmitted in any form, or by any means, mechanical, photocopying, recording, or otherwise, without the prior written consent of Brightree LLC. Brightree LLC may take any action permitted by law to enforce its rights hereto.

The information contained in this document is subject to change without notice. The enclosed materials are not a contract and create no rights upon the reader or obligations of any kind on Brightree LLC. Brightree LLC reserves the right to make changes to any products or services described in this document at any time without notice. Brightree LLC shall not be liable for the actions or inactions of the reader in reliance upon the information contained in this document.

Trademarks

Brightree is a registered trademark of Brightree LLC. Any other product and company names used herein are the property of their respective owners.

Version

This documentation was prepared in conjunction with the latest release of **Brightree**, but may be utilized with future releases until such time that more current materials are published.

Comments

Any comments or suggestions regarding the information herein are welcome and should be emailed to the attention of:
documentation@brightree.com

Table of Contents

| | | |
|----------|-----------------------------------------------------------------|----------|
| 1 | Introduction | 4 |
| 2 | Diagnostic Testing | 5 |
| 2.1 | Setting Up Diagnostic Testing | 5 |
| 2.1.1 | User Group Permissions | 5 |
| 2.1.2 | System Setup | 6 |
| 2.1.3 | Functional Security | 7 |
| 2.2 | Using the Diagnostic Testing Sub-Tab | 8 |
| 2.2.1 | Diagnostic Testing Grid | 9 |
| 2.2.2 | Test Summary Grid | 10 |
| 2.3 | Ordering Diagnostic Test | 11 |
| 2.3.1 | Pulling Reports from the Diagnostic Test Provider | 12 |
| 2.4 | Using Patient Notes in Diagnostic Testing | 12 |
| 2.4.1 | Setting Up Diagnostic Testing for Note/Task Templates | 12 |
| 2.4.2 | Creating a Note/Task Template | 13 |
| 2.4.3 | Configuring the Diagnostic Testing Note/Task Template | 13 |
| 2.5 | Using Brightree Document Management in Diagnostic Testing | 15 |
| 2.5.1 | Diagnostic Testing Result Document Type | 17 |
| 2.6 | Ad-Hoc Reporting for Diagnostic Testing | 17 |

1 Introduction

The overview and detail information regarding the Diagnostic Testing features should only be used for the purpose of learning and using the new functionality.

2 Diagnostic Testing

The new Diagnostic Testing feature will allow Brightree customers to order diagnostic tests from one or more Diagnostic Testing Service (DTS) Systems. This integrated solution supports the following features

- Transmission of patient centric data from Brightree to the DTS system
- Ability to share supporting test documentation which exists in the providers Brightree Document Management instance with the DTS system
- Notification of test completion with status information from the DTS system to Brightree
- Ability to view test results and other reports / documents stored in the DTS system from within Brightree
- Ability to automatically store test results from the DTS system into Brightree Document Management upon notification of test completion

2.1 Setting Up Diagnostic Testing

Before users can use the new Diagnostic Testing feature they must first configure the User Group Permissions, System Setup and Functional Security in their system as displayed below:

2.1.1 User Group Permissions

The Diagnostic Testing User Group Permission must be enabled to begin setting up the System Setup and Functional Security settings for this feature. Use the steps below to complete this task:

1. Go to System Setup > User Group > Permissions > System Setup section and change the Diagnostic Testing (Setup) to Full Control:

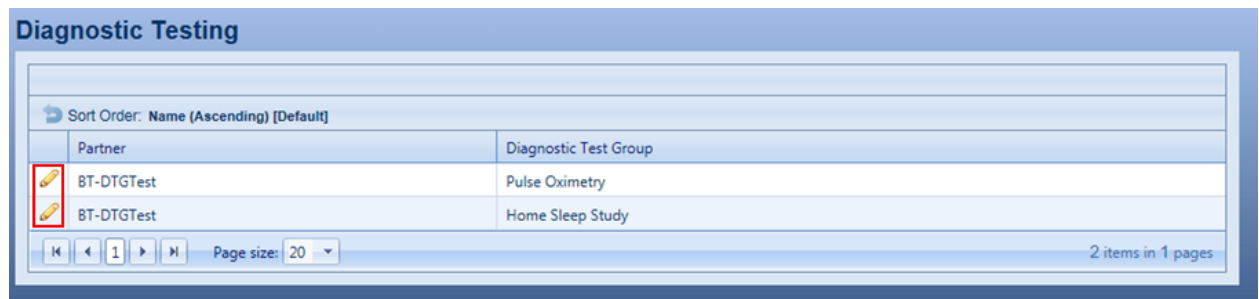
| System Setup | | |
|--------------------------|------------------------------|-----------------------------------------------------------------------------------------|
| <input type="checkbox"/> | Activities (Setup) | Activities Full Control |
| <input type="checkbox"/> | Activity Task Status (Setup) | Activity Task Status Full Control |
| <input type="checkbox"/> | Activity Teams (Setup) | Activity Teams Full Control |
| <input type="checkbox"/> | API Usage (Reports) | API Usage Report Denied |
| <input type="checkbox"/> | Branch Groups | Maintain branch groups, which allow you to categorize your branch offices. Full Control |
| <input type="checkbox"/> | Branch Offices | Maintain information for your physical branch office locations. Full Control |
| <input type="checkbox"/> | Carrier Types | Carrier Types Full Control |
| <input type="checkbox"/> | Custom Fields (Setup) | Custom Fields Full Control |
| <input type="checkbox"/> | Diagnostic Testing (Setup) | Diagnostic Testing Integration Denied |

2. Click Save.

2.1.2 System Setup

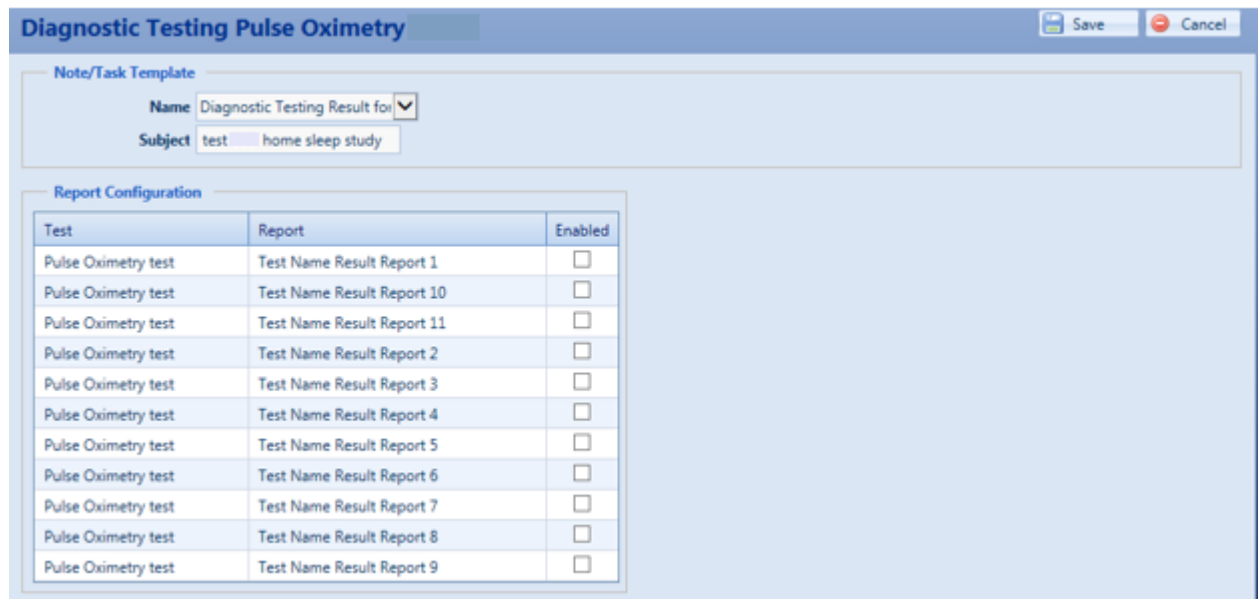
The System Setup menu contains the configuration information for the integration of Brightree and the DTS system. This includes the Note Template that is used when the test completion results are received as well as the configuration for saving test result reports to Brightree Document Management. Use the steps below to configure system setup for Diagnostic Testing:

3. Go to System Setup > Setup and select Diagnostic Testing to display the Diagnostic Testing page. This page displays the Partners and Diagnostic Test Groups that have been setup in your system:



| Partner | Diagnostic Test Group |
|------------|-----------------------|
| BT-DTGTest | Pulse Oximetry |
| BT-DTGTest | Home Sleep Study |

4. Click on the pencil icon of the Diagnostic Test Group and Partner to configure:



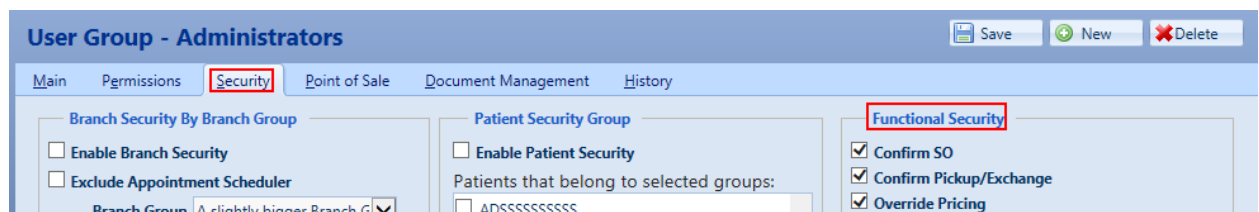
| Test | Report | Enabled |
|---------------------|----------------------------|--------------------------|
| Pulse Oximetry test | Test Name Result Report 1 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 10 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 11 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 2 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 3 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 4 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 5 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 6 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 7 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 8 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 9 | <input type="checkbox"/> |

5. Select a default note task template that will be used to create a note for a patient when the test results are received.
 - This allows the customer to easily determine the patients that have received test results by searching for patient notes with this reason type within a specific date range.
 - When Note Template is selected, the Note Subject displays and can be edited.
6. BDM Users Only - In the Report Configuration section, select the reports that you would like to automatically store in Brightree Document Management by clicking on the Enabled checkbox.
7. Click Save. Note Template will be saved for this DTG partner/site combination.

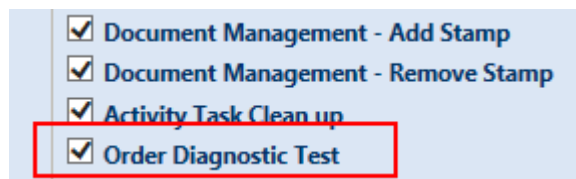
2.1.3 Functional Security

A new functional security setting has been created to control which users are able to order Diagnostic Tests. Use the steps below to enable functional security for user groups that will be ordering tests.:

1. Go to System Setup > User Groups and search for and open a User Group record.
2. Click on the Security tab:



3. Go to the Functional Security section and scroll down to the bottom of the list and select Order Diagnostic Test:

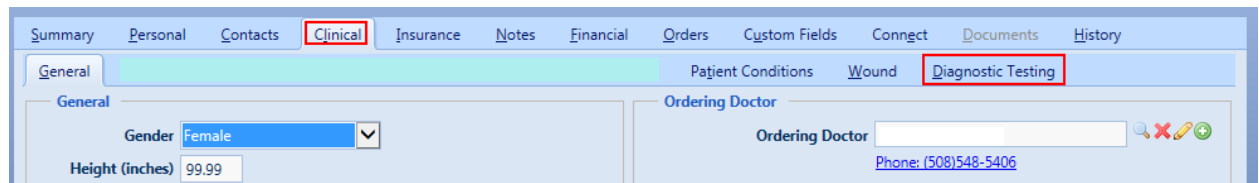


2.2 Using the Diagnostic Testing Sub-Tab

The Patient > Clinical > Diagnostic Testing page is where the customer will order a diagnostic test for a patient.

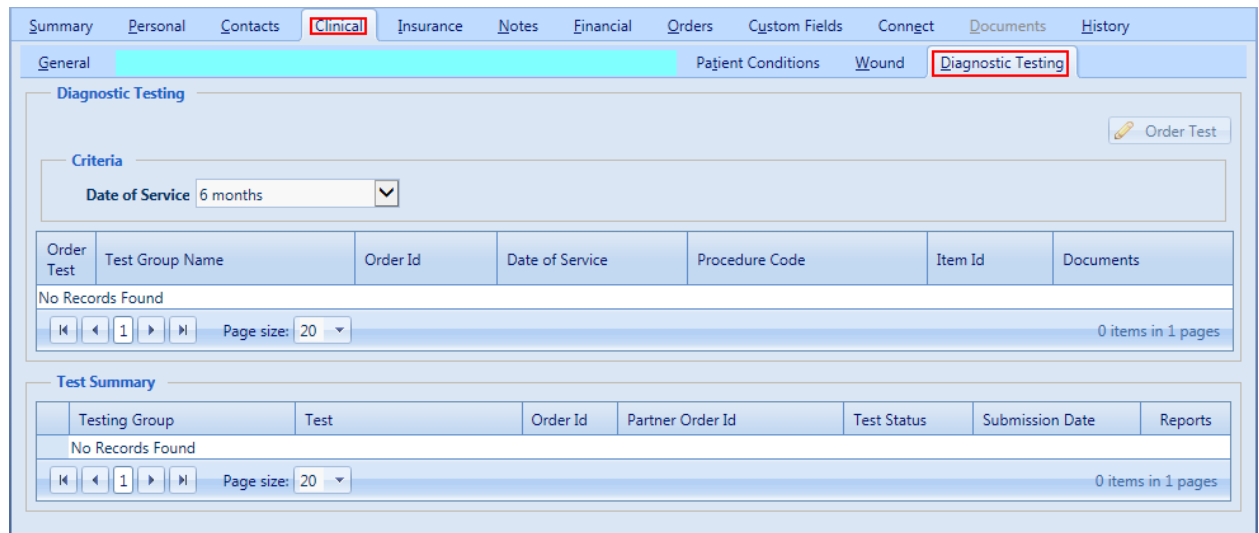
Use the steps below to view this new sub-tab:

1. Go to Ordering > Patients and search for and select a Patient record:



The screenshot shows the Patient record page with the 'Clinical' tab selected. Under the 'Clinical' tab, the 'Diagnostic Testing' sub-tab is highlighted. The 'General' section shows patient information like Gender (Female) and Height (99.99). The 'Ordering Doctor' section shows the doctor's name and phone number.

2. Click on the Clinical tab > Diagnostic Testing sub-tab:



The screenshot shows the 'Diagnostic Testing' sub-tab page. It features a 'Criteria' section with a 'Date of Service' dropdown set to '6 months'. Below this is a table with columns: Order Test, Test Group Name, Order Id, Date of Service, Procedure Code, Item Id, and Documents. The table shows 'No Records Found'. Below the table is a 'Test Summary' section with columns: Testing Group, Test, Order Id, Partner Order Id, Test Status, Submission Date, and Reports. This table also shows 'No Records Found'. Both tables have pagination controls showing 'Page size: 20' and '0 items in 1 pages'.

The page displays two grids: Diagnostic Testing and Test Summary

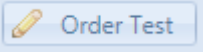
The first grid (Diagnostic Testing) displays the Sales Orders (by default showing sales orders from the last six months) that contain procedure codes that match what is configured for each Diagnostic Test.

The second grid (Test Summary) displays each of the tests that has been ordered along with its status.

| Diagnostic Test Group | Procedure Code |
|-----------------------|-----------------------------------|
| Pulse Oximetry | E0445, 94762, 94760, 94761 |
| Home Sleep Test | 95800, 95806, 95911, G0398, G0399 |

2.2.1 Diagnostic Testing Grid

Use the table below to complete this page:

| Button/Field/Column Name | Description |
|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Diagnostic Testing | |
|  | Click this button to order a Diagnostic Test. Note: you must first check the Order Test checkbox on one of the rows in the grid |
| Criteria -Date of Service | Controls which Sales Orders appear in the grid based upon the Date of Service. Values include: <ul style="list-style-type: none"> • 6 months • 1 Year • All |
| Order Test | This check box allows users to indicate the Sales Order to associate with the test being ordered. |
| Test Group Name | The Diagnostic Test Group that can be ordered for this Sales Order. |
| Order ID | This is a link that will open the Sales Order in a new popup page. Note: A sales order might be listed multiple times if it either contains multiple items with different proc codes or there are multiple Test Groups associated with a procedure code found on the Sales Order. However, each Test Group will only display once for each Sales Order Number in the Grid. |
| Date of Service | The Date or Service of the Sales Order. |
| Procedure Code | The Procedure Code associated to the Sales Order item that relates to a Diagnostic Test. |
| Item ID | The Item ID for the Sales Order Item. |
| Documents | (BDM Users Only) This is a link that will open the Sales Order Documentation tab in a new popup page. This allow the user to easily see if any supporting documentation is available on the sales order that can be made available to the Diagnostic Test provider. |

2.2.2 Test Summary Grid

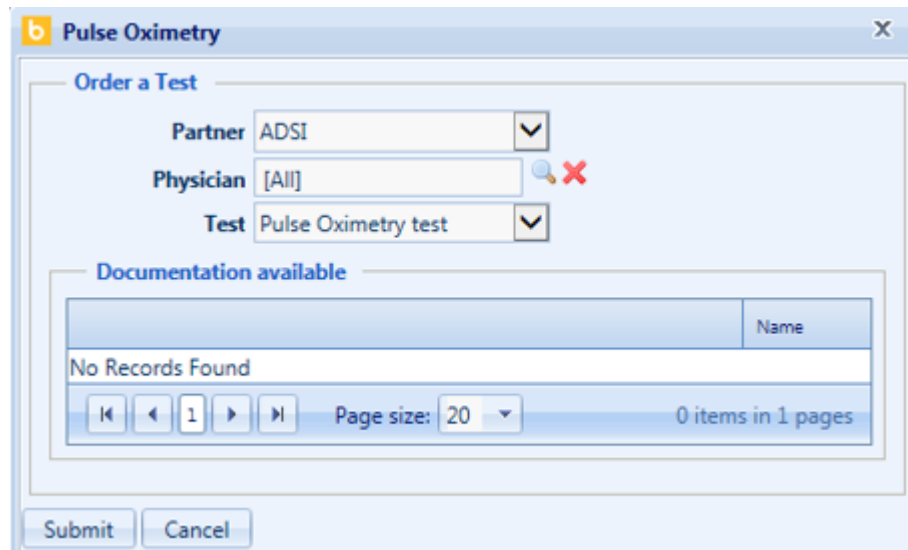
| Field | Description |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Test Summary | |
| Testing Group | The name of the Diagnostic Testing Group |
| Test | The name of the Diagnostic Test |
| Order ID | The Sales Order ID which is a link to the sales order. |
| Partner Order ID | The ID of the Partner |
| Test Status | The status is updated by the Test Provider and will change to Completed once the test has been completed. |
| Submission Date | The date the test was submitted. |
| Reports | This Icon will allow the user to view reports associated with the test. This will open a PDF version of the report downloaded from the diagnostic test partner. |

In addition, the grid contains a checkbox where the customer can select a test to use as the basis for ordering a diagnostic test by clicking the Order Test button at the top of the page.

2.3 Ordering Diagnostic Test

Use the steps below to order a Diagnostic Test

1. Click the Order Test button to display the Order Test popup:



Pulse Oximetry

Order a Test

Partner: ADSI

Physician: [All]

Test: Pulse Oximetry test

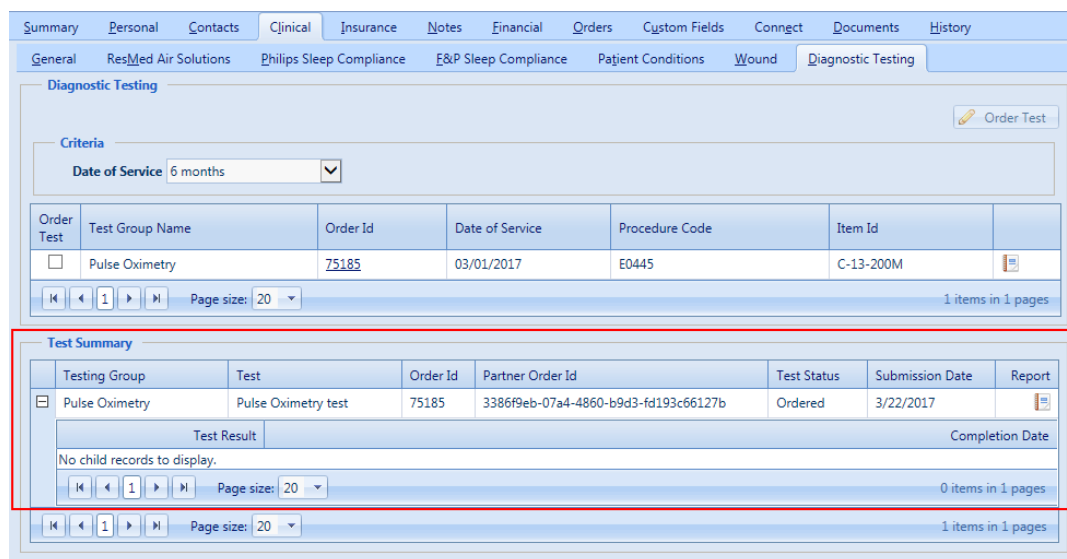
Documentation available

| Name |
|------------------|
| No Records Found |

Page size: 20 0 items in 1 pages

Submit Cancel

2. From this dialog, the user can select the partner and test. In addition, the ordering physician from the sales order will be selected by default. The user can change that physician as needed or supply a physician if none was selected on the Sales Order.
3. In addition, this dialog shows a grid of documents that are associated with the sales order. The user can select any of these documents that provide supporting information for the test provider (example Doctors written order).
4. Click Submit to order the test and a new row will be created in the test summary grid:



Summary Personal Contacts Clinical Insurance Notes Financial Orders Custom Fields Connect Documents History

General ResMed Air Solutions Philips Sleep Compliance E&P Sleep Compliance Patient Conditions Wound Diagnostic Testing

Diagnostic Testing

Criteria

Date of Service: 6 months

| Order Test | Test Group Name | Order Id | Date of Service | Procedure Code | Item Id |
|--------------------------|-----------------|----------|-----------------|----------------|-----------|
| <input type="checkbox"/> | Pulse Oximetry | 75185 | 03/01/2017 | E0445 | C-13-200M |

Page size: 20 1 items in 1 pages

Test Summary

| Testing Group | Test | Order Id | Partner Order Id | Test Status | Submission Date | Report |
|-------------------------------------|----------------|----------|--------------------------------------|-------------|-----------------|--------|
| <input checked="" type="checkbox"/> | Pulse Oximetry | 75185 | 3386f9eb-07a4-4860-b9d3-fd193c66127b | Ordered | 3/22/2017 | |

Test Result

No child records to display.

Page size: 20 0 items in 1 pages

Page size: 20 1 items in 1 pages

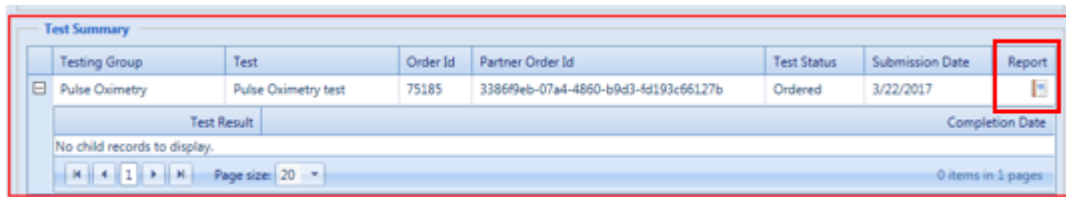
2.3.1 Pulling Reports from the Diagnostic Test Provider


Once a diagnostic test has been ordered, based on the Diagnostic Test Configuration, the system will allow a user to view a report associated with the test that has been previously ordered for a patient.

On the new sub tab of the Clinical tab > Diagnostic Testing tab, a new icon displays that when clicked will retrieve a report related to the test.

Use the steps below to view this feature:

1. Go to Ordering > Patients and search for and open a Patient record.
2. Click on the Clinical > Diagnostic Testing tab.
3. In the Test Summary grid, the Reports icon is enabled after successful diagnostic tests are orders:




| Testing Group | Test | Order Id | Partner Order Id | Test Status | Submission Date | Report |
|----------------|---------------------|----------|--------------------------------------|-------------|-----------------|-------------------------------------------------------------------------------------|
| Pulse Oximetry | Pulse Oximetry test | 75185 | 3386f9eb-07a4-4860-b9d3-4d193c66127b | Ordered | 3/22/2017 |  |

Test Result: No child records to display.

Page size: 20

0 items in 1 pages

4. Click on the Report icon  to retrieve the report. If no report is available, a "Report Not Available" message is returned.

2.4 Using Patient Notes in Diagnostic Testing

2.4.1 Setting Up Diagnostic Testing for Note/Task Templates

Before you can register a patient for Diagnostic Testing, you need to set up a Diagnostic Testing note/task template that will be used by Brightree to notify you when the test has been completed.

You can use an existing note/task template or set up a new note/task template using the following note reason types: patient, financial, or practitioner note reasons. Use of any other type of note reason will fail to work with Diagnostic Testing.

After you set up the note task/template, you then set the note/task template under the Diagnostic Testing page as the default note/task template that is used for the Diagnostic Testing Compliance notifications.

The notifications from Diagnostic Testing are monitored using the Notes option off the Ordering menu.

Note: Before you can set up Diagnostic Testing Templates, the user group you are assigned to must have full control set up under the User Group settings.

You use the Notes option off the Ordering menu to monitor the notifications from Diagnostic Testing.

2.4.2 Creating a Note/Task Template

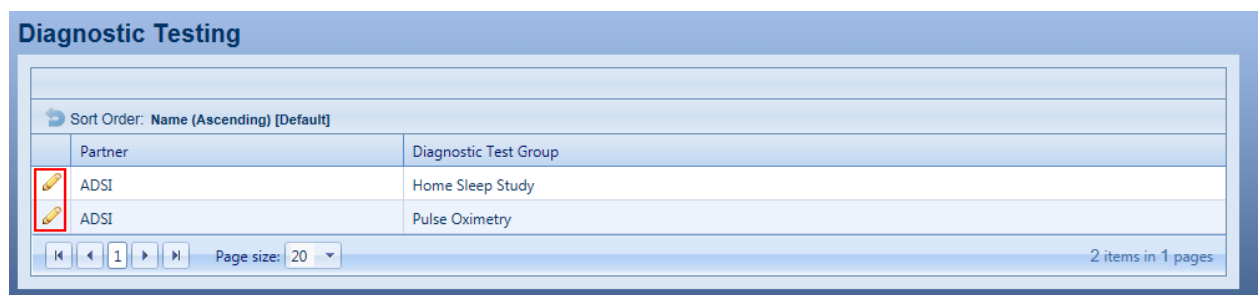
The following steps describe setting up a Patient Note Reason. You can substitute Patient Note in the following steps to create a Practitioner Note Reason or a Financial Note Reason. Only one note/task template needs to be created as only one note/task template is used by Diagnostic Testing to notify Brightree of a patient's compliance.

1. From the Ordering menu, expand Setup, then select Patient Note Reasons. The Patient Note Reasons page displays.
2. From the Patient Note Reasons page, click the New Note Reason button. The Patient Note Reason – General page displays.
3. From the Patient Note Reason – General page, enter the name of the Patient Note Reason and an optional description, and then click the Save button. For example, you might want to enter the name Diagnostic Testing Notification for the name of the Patient Note Reason.
4. Click the Template button to open the Note/Task Template page.
5. From the Details section on the Note/Task Template page, enter the Subject of the note, and then click the Save button.

2.4.3 Configuring the Diagnostic Testing Note/Task Template

The following steps explain how to configure the note/task template for Diagnostic Testing Compliance notification.

1. Go to System Setup > Setup and select Diagnostic Testing to display the Diagnostic Testing page. This page displays the Partners and Diagnostic Test Groups that have been setup in your system:

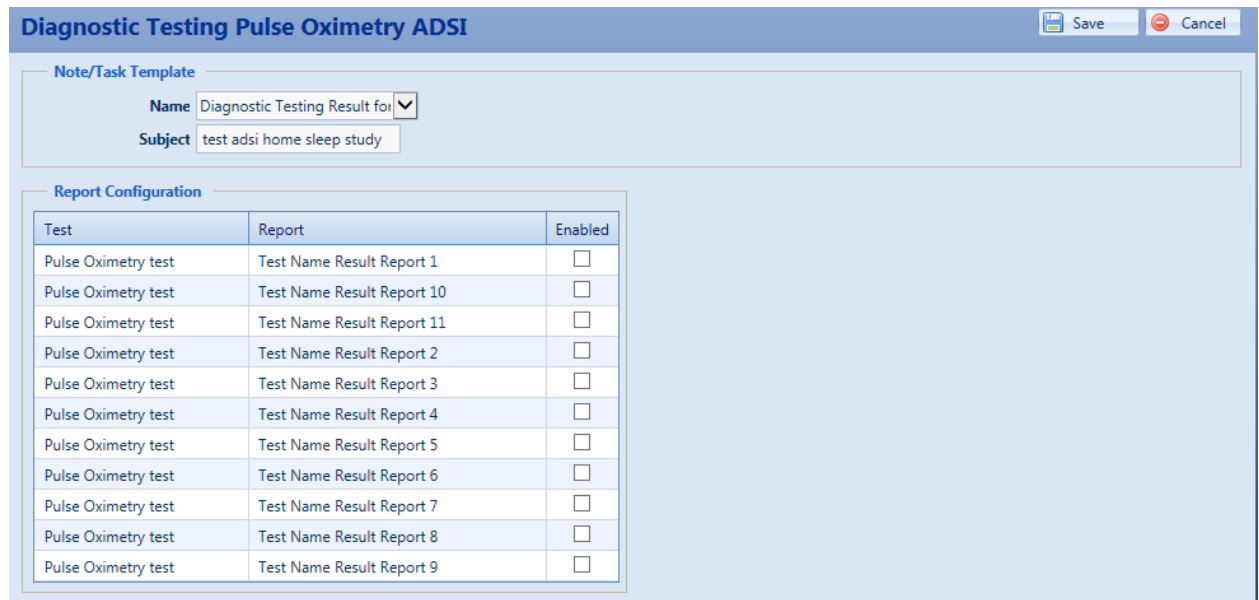


| Partner | Diagnostic Test Group |
|---------|-----------------------|
| ADSI | Home Sleep Study |
| ADSI | Pulse Oximetry |

Sort Order: Name (Ascending) [Default]

Page size: 20 2 items in 1 pages

- Click on the pencil icon of the Diagnostic Test Group and Partner to configure:



| Test | Report | Enabled |
|---------------------|----------------------------|--------------------------|
| Pulse Oximetry test | Test Name Result Report 1 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 10 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 11 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 2 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 3 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 4 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 5 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 6 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 7 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 8 | <input type="checkbox"/> |
| Pulse Oximetry test | Test Name Result Report 9 | <input type="checkbox"/> |

- Select a default note task template that will be used to create a note for a patient when the test results are received.
 - This allows the customer to easily determine the patients that have received test results by searching for patient notes with this reason type within a specific date range.
 - When Note Template is selected, the Note Subject displays and can be edited.
- In the Report Configuration section, click the Enabled button next to the test in which to use.
- Click Save. Note Template will be saved for this DTG partner/site combination.

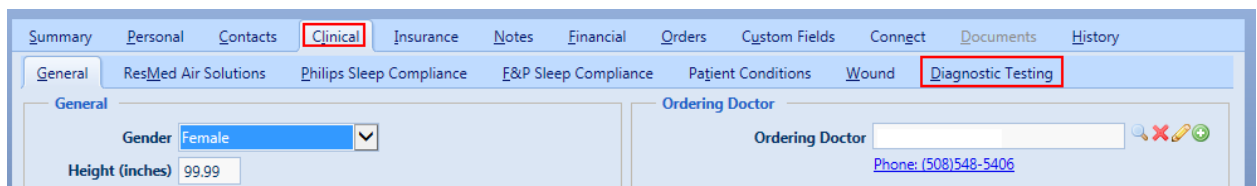
Note: After you select the Note/Task Template, the Note/Task Template Subject is automatically filled in if a Note/Task Template Subject was entered in step 5 in the previous section. However, you can add or change the Note/Task Template Subject on the Diagnostic Testing page by typing in a subject and clicking the Save button. After you save the new subject on the Diagnostic Testing page the updated/changed subject will also display in the Subject field on the Note/Task Template page.

2.5 Using Brightree Document Management in Diagnostic Testing

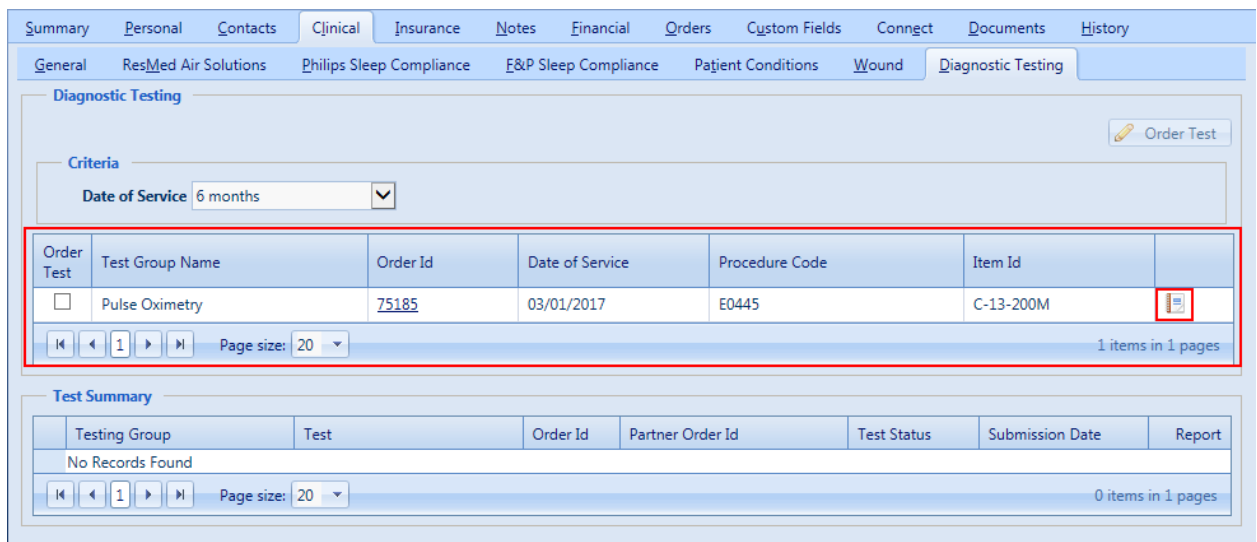
Note: This is only available for customers that are using Brightree Document Management


As part of ordering a diagnostic test, users are provided with the current list of documents that are associated with the Sales Order that the test is associated with. Users can select one or more of these documents as supporting documentation associated with the Diagnostic Test. Use the steps below to perform this task:

1. Go to Ordering > Patients and search for and select a Patient record:



2. Click on the Clinical tab > Diagnostic Testing sub-tab:




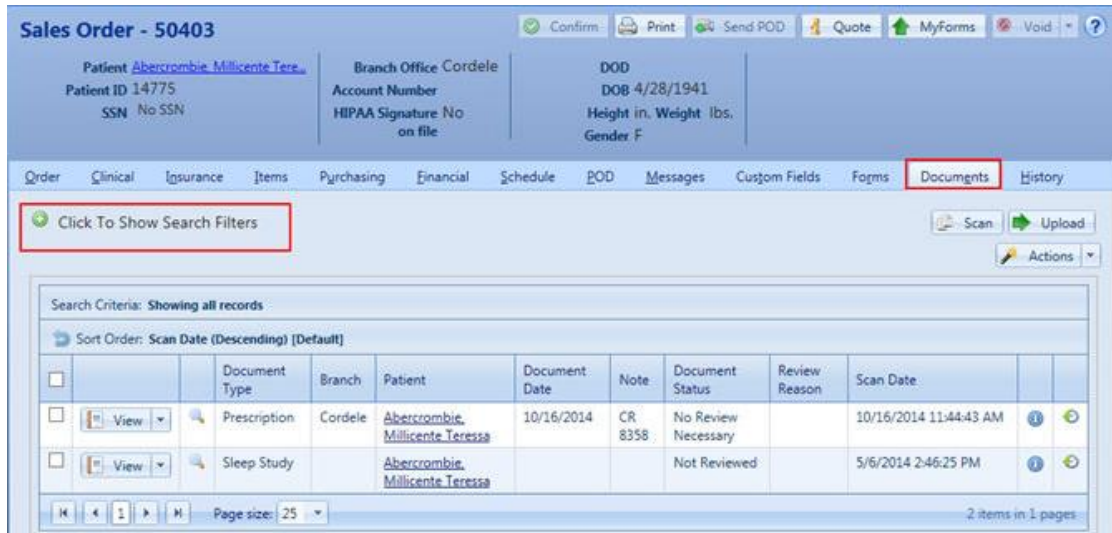
| Order Test | Test Group Name | Order Id | Date of Service | Procedure Code | Item Id | |
|--------------------------|-----------------|----------|-----------------|----------------|-----------|---------------------------------------------------------------------------------------|
| <input type="checkbox"/> | Pulse Oximetry | 75185 | 03/01/2017 | E0445 | C-13-200M |  |

Page size: 20 1 items in 1 pages

| Testing Group | Test | Order Id | Partner Order Id | Test Status | Submission Date | Report |
|------------------|------|----------|------------------|-------------|-----------------|--------|
| No Records Found | | | | | | |

Page size: 20 0 items in 1 pages

- Click on the Book icon . This is a link that will open the Sales Order Documentation tab in a new popup page. This allow the user to easily see if any supporting documentation is available on the sales order that can be made available to the Diagnostic Test provider



Sales Order - 50403

Confirm Print Send POD Quote Myforms Void







Patient [Abercrombie, Millicente Tere...](#) Branch Office Cordele DOD DOB 4/28/1941
 Patient ID 14775 Account Number HIPAA Signature No on file Height in, Weight lbs, Gender F
 SSN No SSN

Order Clinical Insurance Items Purchasing Financial Schedule POD Messages Custom Fields Forms **Documents** History

Click To Show Search Filters Scan Upload Actions

Search Criteria: Showing all records

Sort Order: Scan Date (Descending) (Default)

| | | Document Type | Branch | Patient | Document Date | Note | Document Status | Review Reason | Scan Date | | |
|--------------------------|----------------------------------------------------------------------------------------|---------------|---------|------------------------------------------------|---------------|---------|---------------------|---------------|------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| <input type="checkbox"/> |  View | Prescription | Cordele | Abercrombie, Millicente Teresa | 10/16/2014 | CR 8358 | No Review Necessary | | 10/16/2014 11:44:43 AM |  |  |
| <input type="checkbox"/> |  View | Sleep Study | | Abercrombie, Millicente Teresa | | | Not Reviewed | | 5/6/2014 2:46:25 PM |  |  |

Page size: 25 2 items in 1 pages

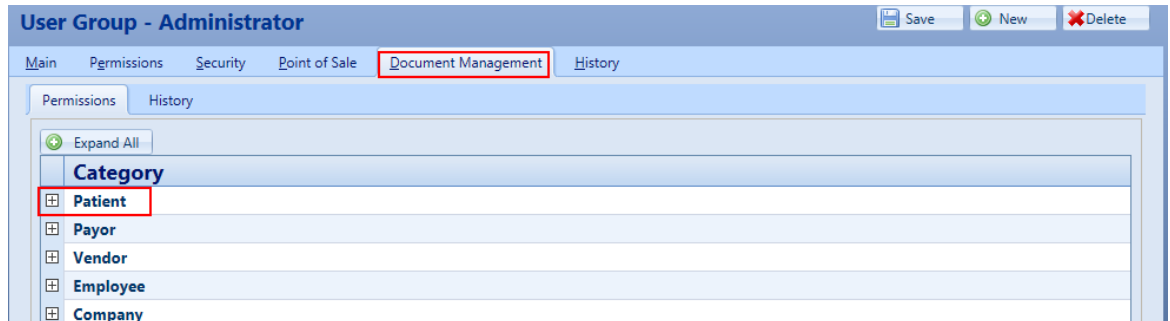
From here, users can view the document, send the document to a Work List, or fax the document. For more information on using the *Accessing Documents from Sales Order*, refer to the *Document Management User Guide* or Online Help.

Note: The documents are also stored directly in the Patient > Documents tab.

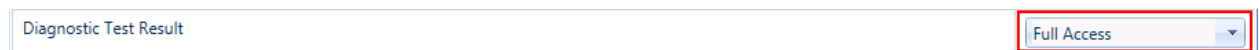
2.5.1 Diagnostic Testing Result Document Type

With the new Diagnostic Testing feature, there is a new BDM document type called Diagnostic Test Result. A system administrator will need to grant the appropriate BDM access rights to each user group that needs access to these documents. Use the steps below to allow access to the Diagnostic Testing documents:

1. Go to System Setup > User Groups > Document Management Tab > Patient Section >



2. Scroll down to the Diagnostic Test Result setting and select Full Access:



2.6 Ad-Hoc Reporting for Diagnostic Testing

Ad-Hoc Reporting is available for Diagnostic Testing using the Sales Orders report which includes a new section for Diagnostic Testing. This is the only report that includes Diagnostic Testing. Use the steps below to view this upgrade:

1. Got to Home > My Ad-Hoc Reports > Design A New Report > Sales Orders > and scroll down to the Diagnostic Testing section to see the available fields:

