



In-House Lab Orders

Common Use Case Integration Package

athenahealth, Inc.

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Formerly Laboratory Orders, Ancillary Orders

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* 1. Scoping Process

Your interface project manager is available to meet, assist with questions, and help determine the best-fit options for your project. Instructions for manual scoping are as follows:

1. **Review**:

Please read the Common Use Case Package and complete all form fields and check-boxes to the best of your ability. Should you have questions about the configuration options presented in this document please do not hesitate to discuss with your interface project manager.

If there is a customization request during the implementation process clients are subject to a fee. If there is a request to customize post go-live you will be subject to modification fees.

1. **Approve**:

When this document is completed to your satisfaction, please approve the scope of the interface by typing your name below.

* 1. Scope Approval

I,      , agree to the interface design as described here in this document.

Date:

1. Project Information

Please fill the following to the best of your ability. While not all contacts are required, you should be able to submit at least two contacts at the onset of a new interface project.

|  |  |  |  |
| --- | --- | --- | --- |
| General Information | |  |  |
| Integration Project Name (if applicable) | | |  |
| Vendor  (If applicable, third party data exchange vendor) | Company Name:  (ex. athenahealth, Inc.) | |  |
| Software Product Name:  (ex. athenaNet) | |  |
| Version:  (ex. 14.9) | |  |
| Interface Engine:  (ex. athenaNet MX Engine) | |  |
| Trading Partner Name | | |  |
| Trading Partner Type (ex. Health Information System, EHR, etc.) | | |  |
| athenahealth Practice Context ID | | |  |
| athenahealth Interface Project Manager Name | | |  |
| athenahealth Interface Project Manager Contact Information | | |  |
| Event Number (provided by Interface Project Manager, for internal athenahealth tracking) | | |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Contact | Role | Details | |
| Project Business Contact | Responsible for overall success of the project | Name: |  |
| Phone: |  |
| Email: |  |
| Project Interface Contact | Interface expert, responsible for continuing interface support | Name: |  |
| Phone: |  |
| Email: |  |
| Project IT Contact | Networking and security expert, responsible for overall connectivity | Name: |  |
| Phone: |  |
| Email: |  |
| Project Compendium Contact | Responsible for providing the facility’s compendium and order entry questions | Name: |  |
| Phone: |  |
| Email: |  |
| athenaNet Username: |  |
| Vendor Contact #1 | Role: | Name: |  |
| Phone: |  |
| Email: |  |
| Vendor Contact #2 | Role: | Name: |  |
| Phone: |  |
| Email: |  |

1. Product Description

This interface supports the secure and automated transfer of information between an external third-party system and athenaNet. To ensure compatibility across a wide array of platforms and software vendors interface data is formatted according to HL7 v2 standards.

By choosing to move forward with this standard integration you are committing to the scope outlined below. If you require any customization to this integration, please contact your athenahealth project manager to engage athenahealth’s Integration Design team for detailed scoping. Please note that any customizations will result in this integration becoming a custom interface, and will incur additional fees.

|  |  |  |  |
| --- | --- | --- | --- |
| Use Case | Event | Default Message | Functionality |
| Order Creation | New order SUBMITTED in athenaNet | ORM 001 | Order SUBMITTED in other system |

1. General Interface Configuration
   1. Message Samples and Specs

For athenahealth samples and specifications, please see the (<http://www.athenahealth.com/developer-portal/developer-toolkit/by-standard>).

|  |  |
| --- | --- |
| **In-House Lab Order (ORM) Message** | |
| **O01** | MSH|^~\&|ATHENANET|432^MA - Athenahealth Family Practice|Lab Orders - Athena - 432|12425373^In House Interface|201707251439||ORM^O01|28064M432|T|2.3.1||||||||  PID||45483|45483||TEST^Batman^||20160813|M|||123 MAIN STREET^^SCHENECTADY^NY^12345||(123)456-7890|||||^^^T||||||||||||  PV1||O|123D432^^^Family Practice Clinic||||123456789^MILLER^BOB^||||||||||123456789^bmiller2|||||||||||||||||||||||||||20170725||||||||  IN1|1|47006^HUMANA - CHOICE (MEDICARE REPLACEMENT PPO)|47006^HUMANA - CHOICE (MEDICARE REPLACEMENT PPO)|HUMANA - CHOICE (MEDICARE REPLACEMENT PPO)|PO BOX 14601^^LEXINGTON^KY^40512-4601|^|(800)457-4708|||||||||SUIZE^SMITH^|Self|20160813|123 MAIN STREET^^SCHENECTADY^NY^12345|||1||||||||||||||123456789|||||||M||||T||  GT1|||SMITH^SUZIE^||123 MAIN STREET^^SCHENECTADY^NY^12345|(123)456-7890||20160813|||Self||||||||||||||||||||||||||||||||||^||||||||||  ORC|NW|622475H432|||||^^^^^R|||||123456789^MILLER^BOB|123D432^^^Family Practice Clinic||||||||FAMILY PRACTICE CLINIC|||  OBR|1|622475H432|102398CE432|LCMP^COMPREHENSIVE METABOLIC PANEL||20170725145113||||^^|L||||^|123456789^MILLER^BOB^|||||||||||^^^^^R||||||||||||||||||  NTE|1||Rule out cancer: Y  NTE|2||Eating/drinking restrictions: N  DG1|1|I10|Z00.129^Encounter for routine child health examination without abnormal findings^I10|Encounter for routine child health examination without abnormal findings||F|||||||||||||  NTE|2||Electronically signed by BOB MILLER |

* 1. External ID Management

To assist with patient ID management throughout an integrated health system, athenaNet can store multiple external IDs. External IDs may be used for matching purposes or external IDs may just be interfaced and stored in athenaNet using custom fields. All patient IDs present in athenaNet, including external IDs such as those supplied by an interface or import process, are available to be sent out over the interface.

Please identify Patient level Custom Fields here:

|  |  |  |
| --- | --- | --- |
| athena Custom Field Name | athena Custom Field ID | HL7 Field |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Are any of the above external IDs formatted with leading zeros?

Additional comments:

* 1. Performing Facility Management
     1. Clinical Location Information

The Interface Project Manager will configure a Clinical Provider associated with the clinical location/performing facility. This Clinical Provider will represent the in-house LIS/RIS and it will define the electronic repository for the facility’s compendium. Please provide the name and full contact information for your performing facility in the table below.

|  |  |  |
| --- | --- | --- |
| Field | Description | |
| Ordering Location | athenaNet will send the athenaNet department ID and Name where the order was signed/approved. | |
| Performing Facility | Name: |  |
| Full Address: |  |
| Phone Number: |  |
| Fax Number: |  |
| Clinical Provider ID (if leveraging an existing Clinical Provider in athenaNet) |  |
|  | Will this facility route orders to multiple locations? | |

**SEND OUT ORDERS TO REFERENCE FACILITIES**: athenaNet supports send out orders as long as the in-house facility routes them to the appropriate external reference facility. Upon completion, the reference facility sends results directly back to the in-house LIS/RIS which in turn must route the data back to athenaNet to be tied to the original order. Multiple unique order codes can exist for one athenaNet order type. However at the time of order creation the provider will need to know the appropriate order code for the facility that they are sending to, whether it is the in-house facility or external reference facility. Once the order is submitted electronically the order code cannot be changed.

* + 1. Compendium Management
       1. Facility Compendium Management

The Interface Project Manager will provide the Project Compendium Contact with a compendium worksheet. The compendium worksheet should contain all orders that you wish to send via the interface to the receiving in-house facility (and reference facilities). After receiving the completed worksheet, the Interface Project Manager will process the compendium through a matching tool, which will attempt to create one-to-one relationships between the athenaNet compendium and the facility-specific order codes. Any facility-specific order codes that are not matched by this tool will be sent through an internal team for further review. athenahealth will map as many of the orders as possible, however it is possible that mappings will not be created for every order in your compendium.

After athenahealth finishes the mapping process, the facility’s compendium can also be made available to you for self-management. Self-managing the compendium allows you to add and edit lab and imaging orders for in-house facilities without going through athenahealth. It also allows you to create or updated mappings for new or existing orderable tests.

Would you like compendium self-management access and responsibility after the orders interface goes live?

* + - 1. Ask On Order Entry Questions

When placing an in-house lab or imaging order that was successfully mapped to an athenaNet order code, the submitter will be exposed to the order’s associated athenaNet global ask on order entry (AOE) questions. athenaNet will send any answered global or custom AOEs in the HL7 message.

Please note that we cannot make changes to the list of athenaNet global AOEs. Outbound Message Configuration

* 1. Orders
     1. Department Filtering

By default, all departments in the tablespace will be able to submit orders via the interface. However, we have the ability to restrict interface access to enable select departments to use the interface.

Would you like the in-house orders interface enabled for all departments?

If no, please provide a list of all the athenaNet department names and IDs that will use the interface:

* + 1. Order Submission Method

By default, the interface will route a signed order to a clinical staff user for further documentation or validation. After reviewing the order for accuracy, the staff user will then submit the order electronically via the interface.

Alternatively, there is a practice setting that can be configured to automatically submit orders via the interface upon order signing (without additional validation). When this practice setting is enabled, it will take effect for all interfaced orders from the practice, and cannot be configured by order type or interface for only a subset of orders.

Please indicate the preferred order submission method for the practice:

|  |  |
| --- | --- |
| Order Submission Options | |
|  | Manual Submission via the Staff Bucket in the Clinical Inbox |
|  | Automatic Submission upon Signed Order |

If you desire an alternate manual order submission route, please speak with your Client Services Representative about configuring Task Assignment Overrides (TAOs) to accommodate your specific workflow.

* + 1. Ordering Provider

The ordering provider must have a valid provider identifier and permissions in athenaNet for the order to submit via the interface rather than via fax. Valid identifiers include, but are not limited to, NPIs and client-generated IDs. Please indicate the ordering provider identifier that will be sent to the LIS/RIS:

|  |  |
| --- | --- |
| Ordering Provider Options | |
|  | NPI |

* + 1. Order Time Zone Selection

By default, athenaNet will send Eastern Time Zone in MSH7, OBR6, and OBR7 (if populated) on the order. If your practice requires a different time zone to be sent, please indicate from the selection below. For additional project customizations, please speak to your project manager:

If you do require a different timezone to be indicated on the orders, please also indicate if the timezone offset should be sent. With the offset, the format of MSH7, OBR6, and OBR7 (if populated) will appear as YYYYMMDDHHMISS+/-HHMI i.e 20170927113043-0500. Without the offset, the same example above would appear as only YYYYMMDDHHMISS.

* + 1. Order Processing
       1. Future Orders

athenaNet supports the scheduling of future orders. The future order will go into a PEND status within athenaNet until the day it is to be performed, where it will ‘wake’ automatically in the early morning and send the order message. A user can manually ‘wake’ a future order at an earlier date and the order message will be sent at that time.

* + - 1. Standing Orders

Standing orders in athenaNet are treated as a series of future orders. A future order will be generated for each instance of the recurrence. The first message will submit on the date the series begins. Subsequent orders will submit as they become active (early morning on the date to be performed).

If a patient arrives at an earlier calendar date for a recurring order, the facility must request the applicable order from the practice. A practice user can wake an instance of a standing order earlier than scheduled by applying the ‘wake’ action to the order’s next instance.

Note: athenaNet currently does not support standing order functionality for imaging orders. Only standing lab orders are available.

* + 1. Limitations
       1. Dedicated Use of In-House Orders Interface

An interface is set up for a specific athenahealth client. The interface will not service clients for whom it is not intended, even if the same format and connectivity apply or if the additional client submits orders to the same clinical provider.

* + - 1. Pre-Existing Orders

Only new orders will submit electronically via the interface. Any order created before the interface goes live, or that has previously been submitted electronically, or has been modified or corrected must be manually updated by the facility. athenaNet does not support order revisions to be sent via the interface. For this reason, we cannot backfill order messages prior to an orders interface go-live.

* + - 1. Order Cancelations and Modifications

athenaNet does not support a cancel order transaction for cancelling or modifying electronic orders. To cancel or modify an order once it has been submitted via the interface, the order document must be deleted in athenaNet and then a manual call must be placed to the performing facility to ensure the order is canceled in their system as well.

* + - 1. Accession Identifiers

athenaNet does not support the concept of accessioning and therefore the assignment of a Clinical Document identifier (order ID) is set at the test level (e.g. CBC vs. TSH). When it comes to generating the electronic order message (ORM), athenaNet will create and send one message per ordered test. A unique encounter ID in OBR.3 and document ID in OBR.2 are provided to indicate which unique orders belong to the same encounter. The receiving system is responsible for associating orders to LIS/RIS-defined specimens.

* + - 1. Interface Message Batching

athenaNet does not support the batching of ORM messages; batching must be done in the LIS/RIS. When multiple tests are ordered during a single encounter or under a single diagnosis, each order will be sent as a separate HL7 message. There will be one OBR segment per order message. The unique encounter ID in OBR.3 and document ID in OBR.2 are provided to indicate which unique orders belong to the same encounter. The receiving system is responsible for associating orders to LIS-defined specimens. Please ensure that your LIS/RIS is capable of accessioning based on these identifiers.

* + - 1. Order Validation

Order messages are only validated for required data elements necessary for the submission of a compliant order message. Validation based on facility-specific requirements for order types, specimen sources, conditional billing data or other requirements is not supported.

1. Connectivity Method Overview

As part of interface implementation, athenahealth will need to establish a secure method of transfer for electronic data to and from a third-party system. The Connectivity Method Overview contains our current connectivity offering as well as information regarding functionality and project steps.

<http://www.athenahealth.com/~/media/athenaweb/files/developer-portal/Connectivity_Methods_Overview.docx>

For questions, please contact your Interface Project Engineer.

1. Appendices and Other References
   1. Planned Maintenance Window

The athenaNet MX Engine is subject to the same maintenance windows as the general athenaNet application. Currently, 1 A.M. to 3 A.M. Eastern Time is reserved every morning for maintenance. By default, all interfaces are shut-off during this time window, and also remain disabled until 4 A.M. Eastern Time.

* 1. Interface Message Queue Manager

The athenaNet Interface Message Queue Manager (IMQM) is an interactive repository for all interface messages that pass through athenaNet. Messages can be categorized into several processing states. Please note that messages in a final state (processed or deleted) will only remain in the queue for 90 days.

|  |  |
| --- | --- |
| Message State | Explanation |
| SCHEDULED | Scheduled to be sent at a later time |
| NEW | Placeholder for a new message and ready to be sent or received |
| DISTRIBUTED | Delivery or acknowledgement is pending for Global interfaces |
| PENDING | Delivery or acknowledgement is pending |
| PROCESSED | Processed normally; remains in queue for only 90 days |
| ERROR | Generic error encountered; routed to client |
| CBOERROR | Billing related error encountered; routed to client |
| ATHENAERROR | Internal error encountered; routed to athenahealth Client Support Center |
| DELETED | Messages that have been deleted; remains in queue for only 90 days |

In order to access the IMQM in athenaNet to manually resolve common errors, such as missing providers, invalid procedure codes, or unknown departments, the following user permissions must be granted by the local system administrator:

|  |  |
| --- | --- |
| Permission | Use Case |
| Interface Admin: View Message Queue | You want to be able to view the IMQM. |
| Interface Admin: Map Insurance Messages | You need to map insurance messages. |
| Interface Admin: Map Messages (except Insurances) | You need to map all messages excluding insurance messages (e.g. provider and department mappings). |
| Interface Admin: File Upload Interface | You want to be able to upload files via the interface. |

See [athenaNet Interface Queue Management Guide](http://www.athenahealth.com/developer-portal/developer-toolkit/support) for more information on the functionality of the IMQM and on client-side cleanup for ERRORs and CBOERRORs.

* 1. Continuing Service and Support

Within two weeks after go-live your interface will be transitioned into our daily service and support structure.

As a standard practice, athenahealth continuously monitors all client connections and will notify the contacts specified if an error occurs. All jobs are monitored and automatically restarted if idle. For more details please refer to the [Interface Down Support Document](http://www.athenahealth.com/developer-portal/developer-toolkit/support).

To contact athenahealth for questions or modifications to the interface, support can be accessed directly in athenaNet:

