

POLICY & PROCEDURE



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|--|----------------------|------------------------|--|------------------------|
| TITLE: Tracking Imaging Tests | | | | |
| Scope/Purpose: To provide a consistent, orderly process for the ordering and tracking of imaging tests ordered by agency healthcare providers. | | | | |
| Division/Department: All HealthPoint Clinics | | | Policy/Procedure #: | |
| Original Date: 6/19/06 | | | ___New <u>X</u> Replacement for: Test Tracking 7.6.11 | |
| Date Reviewed: | Date Revised: | Implementation: | CPIC Approved: | Board Approved: |
| October 2015 | | 10/13/2015 | 10/13/2015 | |
| Responsible Party: Operations Officer ; Director of Nursing; Director of Compliance/QA | | | | |

DEFINITIONS:

N/A

POLICY:

Accurate diagnosis of clinical conditions and efficient treatment requires appropriate tracking of medical necessary imaging procedures and timely follow up on results..

PROCEDURE:

1. HealthPoint does not have an interface with any of the radiology centers. Instead, imaging tests are ordered in the EHR and eFaxed to the center. A copy is printed by the ordering provider or the medical assistant and is given to the patient to present to the imaging center. Results are typically received via eFax and attached to the patient's order.
2. Providers order and receive results via the electronic health record system and are specifically trained on the proper steps of this important component of treating patients including:
 - a. Ordering diagnostic imaging
 - b. eFaxing or printing orders
 - c. Reviewing results through scanned reports
 - d. Forwarding orders to clinical staff based on the results
 - e. Monitoring the outstanding diagnostic imaging report status to ensure the timely receipt of all ordered tests
 - f. Retrieving results of other providers in the case of colleague absence

3. Abnormal Imaging Results

a. Receiving abnormal results

The imaging services will call the provider of significant abnormal results impacting treatment or requiring further testing. For example,

b. For the communication of abnormal results, per the provider's orders:

i. A clinical staff member will attempt to contact the patient/parent/guardian by:

- **Telephone call.** If unsuccessful, after at least three attempts, or disconnected telephone number then,
- **Written letter** to the patient/parent/guardian, providing one of the following:
 - instructions for follow-up care
 - instructions to call staff to discuss the results
 - instructions to call to schedule an appointment with provider
(Letters in both English and Spanish are maintained within and printed directly from the EHR system for tracking purposes.)

ii. At the provider's discretion, an appointment may be required to discuss abnormal results.

iii. All communication (or efforts to communicate) must be documented within the patient's medical record typically in the notes section of the diagnostic imaging result window or within a telephone encounter.

4. Abnormal Imaging Results Requiring Extended Testing or Follow Up

a. Abnormal findings with certain imaging procedures of a higher risk may require additional testing or a longer period of monitoring/follow up. Abnormal tests in this category includes, but not limited to, abnormal mammograms and positive chest x-rays. These should be tracked through utilization of "Actions" within eCW. (Refer to attachments: Tracking Via Actions; Tracking Flowchart)

b. The **Action** button is accessed on the hub. As the follow-up task is identified, a new action is created. (See attachment: *Creating & Using Actions*).

To create the **Action** complete the following fields:

- **Subject** – What/why the Action was created. Example: "*Abnormal Mammogram – Notification*". Though free text can be used in this section, it is strongly suggested to **use the drop-down options** and select the pre-loaded text. These pre-loaded texts are searchable.
- **Action Type** – What is going on with the Action or at what step in the follow up. Multiple actions are available in the drop down. Typical actions used for the abnormal test tracking include:
 - 1st letter sent
 - 2nd letter sent
 - 3rd letter sent (Certified)
 - Appointment Pending Pt has made appointment to see requested provider

- Pt notifies of results Pt has returned to clinic and received results. Action should then be marked as “completed” and closed out
 - Lost to Follow-up Pt has not responded to any letters or phone calls. Action should now be marked as “completed” and closed out.
 - **Status** – defines the stage of completion. Examples: “*in progress*” or “*completed*”
 - **Notes:** Regarding the narrative of what is being done, please note this information is NOT part of the patient’s medical record. Any letters sent or phone calls made regarding the action should also be documented via a telephone encounter. To add the contents of an Action to the patient’s medical record, highlight the notes section, copy and paste into a new Tel encounter. Please make sure it is labeled with what is being done in the “Reason” section of the Tel encounter.
- c. On the date the action is due it will be seen in the “T” jelly bean of the person assigned to the action. After the designated task is performed the Action Type can then be moved to the next step in the process and a new date for completion entered. (See Attachment: Sample Action Process). This process is followed until the final outcome is achieved and the **Action** closed as “Completed”.
- d. Actions can be viewed under the DRTLTA tab. When in the progress notes, clicking on the listed **Action** in the DRTLTA tab will cause the Action to open. Note: Though Actions are listed in the DRTLTA tab from the HUB, the actions cannot be opened from this tab. All actions can be opened from the *New Action* button. (See Attachment: Accessing Actions- screen shots)
- e. Completion of Actions may be monitored by going into “Review Actions”. (Refer to attachment: *Monitoring Action Status*). Outstanding actions can be filtered by provider, person assigned the Jelly Bean, or by clinic and sorted by the “subject”. This provides a tool for monitoring completion of the actions as well as to identify actions that must be reassigned in the event of staff leaving or being reassigned other duties.

5. Normal Imaging Results

- a. For the communication of normal results:
 - i. Patients will be informed that they can expect one of the following:
 1. direct communication via a phone call regarding their results
 2. a letter will be sent to them once the results are received indicating the results are normal – this usually will occur within 7-10 days

3. their results can be viewed on the Patient Portal once received and reviewed by the provider. (Patient must be enrolled in Patient Portal for this access.)

6. Setting Appointments for Imaging Orders

- a. For imaging orders, clinics should try and schedule an appointment for the patient while the patient is at the clinic.
 - i. Once the appointment is scheduled, in the “Reason” box of the Diagnostic Imaging Results window, put the date of the appointment. This will allow us to know when the order is officially overdue.
 - ii. If the radiology company does not require an appointment and takes patients on a walk-in basis only, please ask the patient for an approximate date of when they will get their imaging and put that date in the “Reason” box.

7. Tracking Overdue Imaging Results

- a. All imaging has been set with an overdue date of 20 days. Once the test has been ordered, HealthPoint has 20 days to receive the result. If the result is not received within 20 days, the imaging test is automatically flagged with RED lettering to indicate it is overdue. Of course, if the patient has a scheduled appointment after the 20 day timeframe, their imaging order will come up as overdue, but in reality, it will not be due until after their appointment date has passed. Please keep that in mind when working the overdue imaging results.
 - i. The overdue test will be in the provider’s L Jellybean under the “Outstanding” tab.
 - ii. On a regular basis, a designated staff member will go to the provider’s “Outstanding” tab and locate all overdue imaging. The staff member will follow up with the imaging center or patient to determine why the results are overdue.
 1. In the Imaging Results window, the staff member will put **‘Overdue Results’** in the “Reason” box along with **‘see telephone encounter’** in the “Notes” section.
 2. The staff member then will generate a telephone encounter to document any contact with the patient/imaging company regarding the overdue results.
 - a. In the telephone encounter in the “Reason” box, the staff member will put **‘Tracking Overdue Imaging Results’**.
 - b. All contact regarding the overdue test should be documented in the “Message” tab under “Add Action Taken”.
 3. All follow up actions should take place within 15 days of the results being flagged as overdue. This means that the imaging order should be closed out within 35 days of when it was originally ordered.

RELATED POLICY:

Lab Test Tracking P&P

REFERENCES:

REQUIRED BY:

2014 PCMH Standard 5A, 2-5: Test Tracking and Follow-Up

ATTACHMENTS/ENCLOSURES:

Tracking Overdue Imaging Results Process

POLICY/PROCEDURE TRACKING FORM

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| Division/Department: All HealthPoint Clinics | | | Policy/Procedure #: | |
| Original Date: | | | <input type="checkbox"/> New <input checked="" type="checkbox"/> Replacement for: Test Tracking | |
| Date Reviewed: | Date Revised: | Implementation: | CPIC Approved: | Board Approved: |
| October 2015 | | 10/13/2015 | 10/13/2015 | |
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| Date of Revision | | Description of Changes | | |
| 10/13/2015 | | Expansion of tracking process; "Action" process implemented for tracking required follow up testing. | | |
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