

Order Management Enhancements

Issues to address:

Performance Issue: Large orders, especially ones with evenly applied adjustments, can have an extreme processing time due to background pricing calculations.

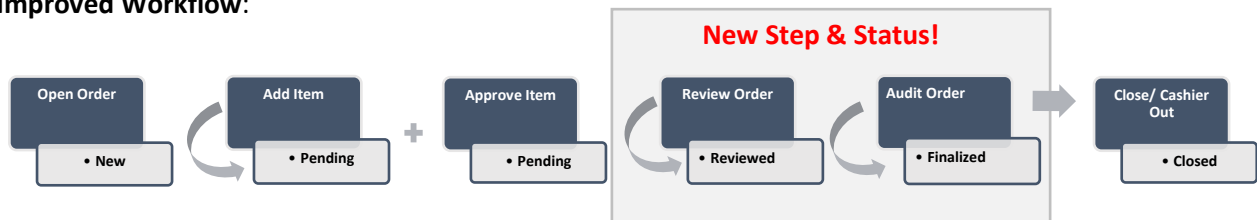
Feature Request: Add a status or flag to indicate that clinician has entered all charges and patient is ready for check out.

Resolution is in versions 1.4.11 & 1.5.1

Existing Workflow: All statuses update automatically with actions



Improved Workflow:



New Permissions:

Review Order: User is able to set order status to “Review” indicating that all charges have been entered.

Finalize Order: User is able to set order to “Finalized” status indicating that the bill is ready for payment.

Unfinalize Order: Allows a user to revert an order back to “Review” status to allow edits.

Approve & Finalize Order: This permission grants access to an option on the Order Management Screen to bypass the Review status, approve all order items and advance the order directly from Pending to Finalized. User would still require the separate “Approve Adjustments” privilege to have action apply to adjustments.

Cashier Approve & Finalize Order: This permission grants access to an option on the Cashier Screen to bypass the Review status, approve all order items and advance the order directly from Pending to Finalized. User would still require the separate “Approve Adjustments” privilege to have action apply to adjustments.

Revised Workflow:

1. Create order for visit and add items, as usual.
2. Approve all items. If needed, have team member with permissions approve adjustments.
3. At this point, there are several options to complete the workflow from the Order Management Screen, depending on your hospital's workflow and responsibilities. Option A is suitable for a hospital with an auditing team. Option B would be desirable for a hospital without auditing or prefers a more expedited workflow.

Option A:

- a. Select "Set Order to Review" (this function is controlled by "Review Order" permission). This indicates that all charges have been entered and the order is ready for auditing.
- b. Auditor reviews order and once they have confirmed the order is complete, they select "Finalize Order" (this function is controlled by "Finalize Order" permission). Finalizing the order locks the order and prevents further changes. This also triggers the tax calculation, application of adjustments, and provides the client's final invoice total. An order must be in Finalized status before it can be closed via the Cashier Screen. A separate permission exists for unfinalizing the order to allow for editing.
- c. Once the order has been finalized, then the cashier is able to collect payments and close the order.

Option B:

- d. Select "Approve All & Finalize" (this function is controlled by "Approve & Finalize Order" permission). This process bypasses the Review status, approves all items, and pushes the order to Finalized status. If the order contains an adjustment, the "Approve Adjustments" permission is required or the adjustment item will need to be approved separately by a user with that permission. Finalizing the order locks the order and prevents further changes. This also triggers the tax calculation, application of adjustments, and provides the client's final invoice total. An order must be in Finalized status before it can be closed via the Cashier Screen. A separate permission exists for unfinalizing the order to allow for editing.
4. To facilitate a streamlined workflow, an Approve and Finalize option can be added to the cashier screen by assigning the "Cashier Approve & Finalize" permission. If the order contains an adjustment, the "Approve Adjustments" permission is required or the adjustment item will need to be approved separately by a user with that permission. Then the cashier can approve all items and finalize the order from the cashier screen before processing payments or closing the order.