eRAD RIS

RELEASE ANNOUNCEMENT

Build 4.2023.009

UPDATED MARCH 16, 2023

PUBLICATION HISTORY

Revision	Author	Description
March 16, 2023	Kevin Brooks, Michelle Mahabir / Hilary Saltmarsh	▪ Commercial release.

SUMMARY

Release Announcement

This release of ERAD RIS 4.2023.009 introduces changes for configuring workflow and user preferences in the Provider Portal.

New Features

This release introduces the following features and enhancements:

Category	Redmine #	Subject	Description
Provider Portal	31662	Allow All Staff User for a Provider Access to View Orders Pending Approval	This enhancement to the Provider Portal allows all staff users to view orders in a pending approval status to permit for visibility.
Portals	32683	Update Access Options for Staff Users in both Referring and Admin Portal	This enhancement to the Referring Portal and the Admin Portal updates the access options given to staff members when creating orders.
Provider Portal	32696	Allow Staff users with Review Required permissions to edit/cancel pending orders	This enhancement to the Referring Portal provides staff users with accessibility to edit or cancel pending orders.
System Configuration	32840	Remove Location restriction from Referring Order Preferences from Referring Portal and Admin Portal	This enhancement to the Referring Portal and the Admin Portal removes the location-level restriction for creating orders from user's Account Settings options.
Portals	33308	Add Referring Physician Location Exclusion to Staff User Settings	This enhancement to the Referring Portal and the Admin Portal adds the ability to add location exclusions for staff users.

Refer to the Feature Details section below for configuration and usage information.

Resolved Issues

This release resolves the following issues:

Category	Redmine #	Subject
Patient Portal	33182	Resolved Patient Portal issue where retrieving PACS images returned an error.

New Known Limitations

No new known limitations were identified with this release.

FEATURE DETAILS

Provider Portal

Feature #31662 – Allow All Staff User for a Provider Access to View Orders Pending Approval

Summary

This enhancement to the Provider Portal allows all staff users to view orders in a pending approval status to permit for visibility.

Feature Description

Previously, orders in a pending approval status were only viewable to the Provider and the Staff User that created the order. As a result, duplicate orders were being entered in the system.

With this change, all staff users that are listed under the referring physician will have the ability to view orders that are pending approvals/UM Pending Review on the Pending tab. Users will also have access to add attachments while the order is in a pending approval status.

In addition, a new `Requested By` filter criteria option has been added to the `Pending Order` tab for referring users. However, when logged in as a staff user, this filter criteria will be removed so all associated staff can see pending orders for the selected referring and any affiliated referring users.

REQUESTED BY FILTER SETTINGS IN THE SYSTEM CONFIGURATION LOOK UP TABLE

Note, while in the Portal, changing the `Viewing For` dropdown will reorder the worklist. Additionally, the counter at the bottom of the Pending Tab screen will be updated to reflect who is currently being viewed.
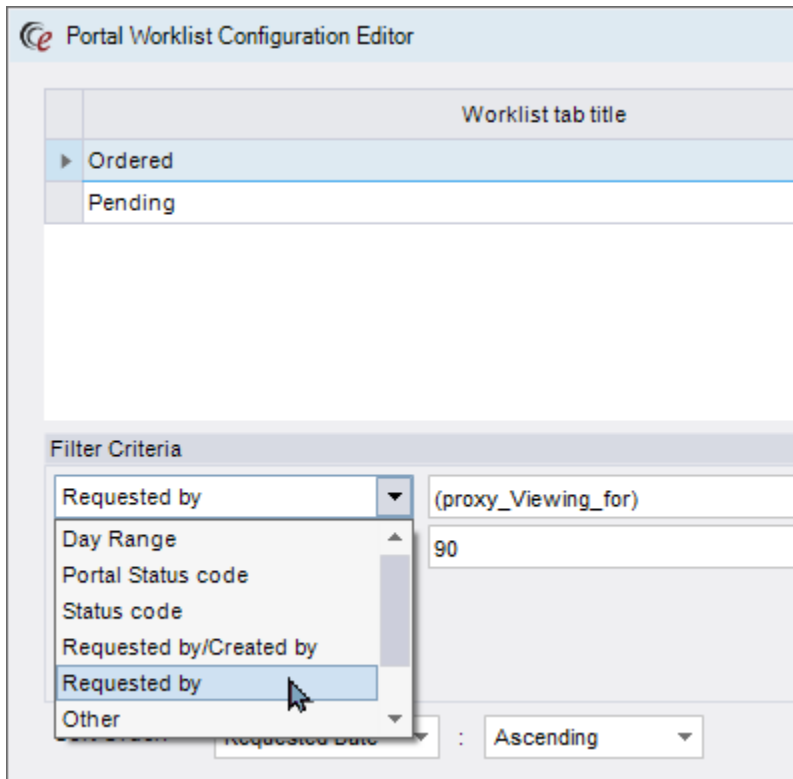
Configuration Instructions

System Administrators must complete the following actions to enable this feature:

RIS Client

Changes to SystemConfig Lookup Table

To enable the `Requested By` filter option:

- Edit the `Value` field of the `RPDefaultOrderTabCriteria` system configuration code to access the configuration dialog and adjust the `Filter Criteria` setting as desired.

Portals

Feature #32683 – Update Access Options for Staff Users in both Referring and Admin Portal

Summary

This enhancement to the Referring Portal and the Admin Portal updates the access options given to staff members when creating orders.

Feature Description

Previously, read only was not an available access option for staff user account creation.

With this change, a third access setting will be introduced to give staff users a `No Order Access (ReadOnly)` option.

The wording of the existing choices has also been updated:

- No Order Access (Read Only)
- Create Pending Order (Needing My Review)

- Create Full Order (My Review Not Required)

> ⚠️ *The default setting for new staff users will now be* `No Order Access (Read Only)`.

Known Limitations

While there are no Known Limitations for this feature, there is additional functionality planned for a future release that will change the implementation approach, and is expected to impact how this feature will be configured:

- FEATURE #32840 – REMOVED LOCATION AS SETTING CRITERIA FOR REFERRING ORDER PREFERENCE FOR STAFF FROM REFERRING PORTAL AND ADMIN PORTAL

Configuration Instructions

No System Administrator actions are necessary to enable this feature.

Provider Portal

Feature #32696 – Allow Staff users with Review Required permissions to edit/cancel pending orders

Summary

This enhancement to the Referring Portal provides Staff users with accessibility to edit or cancel pending orders.

Feature Description

Previously, Staff users with `Review Required` permissions did not have the access to make these changes to a pending order.

With this change, staff users with the updated `Create Pending Order (Needing My Review)` permissions will now have ability to edit or cancel orders that are currently pending under the following conditions:

- The staff user is viewing for a referring that is associated to the requesting referring and requesting address.
- The staff user is associated to the requesting referring through a proxy or affiliation.
- The staff user does NOT have `Read Only` permission for requesting referring.
- The staff user does NOT have a location exclusion for the requesting address.
- The pending order is NOT a UM case.

Staff with location exclusions for the requesting address will be treated similarly to staff with `Read Only` permission.

Additionally, the edit and cancel icons have been added to the `Pending` tab and the `Order` screen in the patient account.

Known Limitations

While there are no Known Limitations for this feature, there is additional functionality planned for this release that will change the implementation approach, and is expected to impact how this feature will be configured:

- FEATURE #32683 – DISABLE ORDER WITHOUT REVIEW
- FEATURE #33308 – ADD REFERRING PHYSICIAN LOCATION EXCLUSIONS TO STAFF USER SETTINGS

Configuration Instructions

No System Administrator actions are necessary to enable this feature.

System Configuration

Feature #32840 – Remove Location restriction from Referring Order Preferences from Referring Portal and Admin Portal
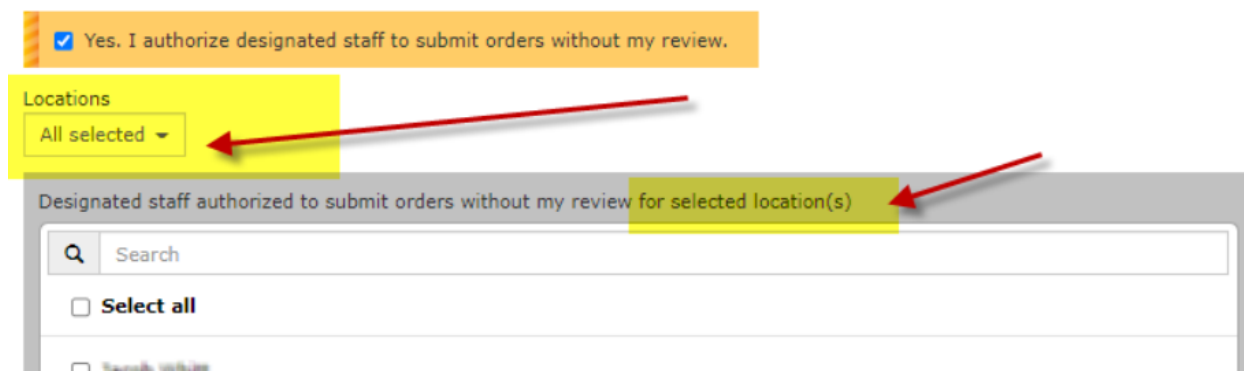
Feature Description

This enhancement to the Referring Portal and the Admin Portal removes the location-level restriction for creating orders from user's Account Settings options.

Previously, when configuring staff users to have the ability to create orders with or without review, the location was a criteria to choose from. This was causing issues when new locations were added to RIS, as the settings were not moving over to the newly added locations.

With this change, the location level settings option will no longer be a criteria to choose from in the `Account Settings` on the `Orders` tab.
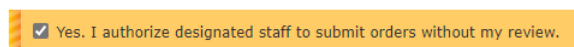
⚠️ *Upon upgrading, any existing users with established* `No Review Required` *permissions will now have access to all current and future locations.*

PREVIOUSLY, LOCATION RESTRICTION WAS AN OPTION.

UPDATED AUTHORIZED TO ORDER FIELD

Configuration Instructions

No System Administrator actions are necessary to enable this feature.

Portals

Feature #33308 – Add Referring Physician Location Exclusion to Staff User Settings

Summary

This enhancement to the Referring Portal and the Admin Portal adds the ability to add location exclusions for Staff users.

Feature Description

Previously, when adding a new Staff user, the user would not inherit existing settings that were affiliated with the referring such as locations. This behavior was removed in FEATURE #32840 – REMOVE LOCATION RESTRICTION FROM REFERRING ORDER PREFERENCES FROM REFERRING PORTAL AND ADMIN PORTAL.

With this change, users will now have access to all locations by default, unless specially excluded using this new setting.

Referring Portal Changes

The existing `Orders` tab has been renamed to `Staff Settings` to accommodate the changes.

Additionally, a new collapsible `Staff Location Exclusions` section has been added between the `Default Ordering Provider` and `Authorized to Order` sections.

Exclusions restrict patients seen from the listed location on both the `Home` and `Orders` tab. To view patients seen at excluded locations, the staff user will need to perform an out of practice search.

Note that if the referring is the staff user's proxy and adds an exclusion, this will also remove access for all other affiliated physician's patients at that location.

If the referring is the staff user's non-proxy and adds an exclusion, this will only remove access from their patient's at that site.

1. Staff User drop down values display the logged in Physician, Proxy user and users of logged in Physician affiliated users.
   a. Searching for staff user by username is permitted.
2. Current access values are based on the Physician that is logged in.
3. Moving locations from Current Access to Exclude will also cause the locations to display in the Exclusions field at the bottom of the screen.
   a. Access to those locations will also be removed for Physician that is currently logged in.
4. Checking one or more locations from Exclude to Current Access will add access back.

Admin Portal

Under the individual staff user and the Referring Physician account:

Within the existing `Proxy and Affiliations` tab, a new `Staff Location Exclusions` section has been added.

| User Details | Preferences | Proxy & Affiliations | Account | Add Ons |

PENDING ORDER NOTIFICATION

Pending Order Notification Type   None selected ⌄

Pending Order Notification Frequency   None selected ⌄

SAVE   CANCEL

PROXY RIS ID

| Staff Provider | RIS ID | ADD |

STAFF LOCATION EXCLUSION

Staff User

[⌄]

Exclusions:

[Search   🔍]

| Staff User | Site Exclusions |

PROXY ORDERING

No designated staff authorized to submit orders without my review

AFFILIATED PROVIDERS

Referring Provider	RIS ID	Affiliation
There are currently no rows to display.		

1. The information that appears in the Staff Location Exclusion screen depends of the Referring that was searched for.
2. When exclusions are added or removed via the Admin portal, changes will reflect for both the Staff User and the Referring Physician.
3. Note that searching for a Staff user will prompt the system to look for associated Referring physicians as shown below.

PROXY USER DETAILS

Please select user to find associated information

Referring Provider

[TEST, REFER   ⌄]

STAFF LOCATION EXCLUSION

Referring Provider

[TEST, REFER   ⌄]

Current Access:

[🔍 Search   ]

☐ **Select all**

☐ 1234 Test Street(refertest_P)

☐ 1234 Main StreetNew York(refertest_P)

Exclude:

ADD ▶   [No Excluded Locations.]

◀ **REMOVE**

Exclusions:

[Search   🔍]

| Referring Provider | Site Exclusions |

Staff User Display

When the staff user is logged in, their list of `Staff Location Exclusions` will be viewable as:

Staff Location Exclusion

Exclusions   331 OAK MANOR DRSUITE 102(ve ⌄

Configuration Instructions

No System Administrator actions are necessary to enable this feature