2015-07-22 Design Forum

Attendees

- Darius
- Jonathan
- Burke
- Daniel

Agenda/Notes

- Encounter Transactions and visit Templates


When are orders activated/finalized?

- Doctor writes and signs an order: it is Signed and it is Activated
- Nurse writes and signs an order: it is Signed and it is Activated (and also posted to a Cosign queue)
- Student writes and signs an order: it is Signed, NOT Activated until Cosigned. (via a business rule) (also posted to the Cosign queue)

Burke: once an order is "activated" you would have to countermand it, and can't otherwise edit it
JT: thinks of that as being true for a "signed" order

Aside: FHIR doesn't define any of this. It starts from Active: https://www.hl7.org/fhir/medication-prescription-status.html

- JT: I think this spec applies to the processing of an order (what the nurse does), not writing the order

Order status:

- Draft = may limit who can see it, can be deleted without audit trail
- Preliminary = "anyone" (more people) can see it, but not activated (subject to change, people may act on it with caution/understanding)
- Student Signed = signed by someone without authority to finalize/activate
- Signed = order "frozen" (written in ink), if signed by student, then order not activated until cosigned
- Activated = person with authority has signed or cosigned -- can be prepared, acted upon by other processing units, etc.
  - Usually happens at same time as Signed, unless the signer is a student
- Start time/condition (Started/Live) = refers to when the task should be carried out
- Cosigned = person of authority acknowledges an order written by someone else

Order status flag structure suggestion:

- Draft / Preliminary / Signed are mutually exclusive, could be in one field
- Activated would be separate boolean -- unless we make the former "draft / preliminary / signed but not activated / activated"
- Live is a different field (may be a business rule based on start time and end time)
- Cosigned would be a separate property of the structure

We wrote (mainly about Notes) on 07-20:

- 1. Draft - only I (the author) can see it
- 2. Preliminary [*shared" in Epic] - others can see it but it is marked preliminary. It could be changed, in which case they would see the latest version with a flag to see the earlier ones.
- 3. Final - it's no longer changeable
- 4. (new) (maybe) "invalid" or some flag indicating that this data is not usable [processing error, wrong patient, whatever]

Kinda hoping that these definitions apply to many data types

List of statuses:

- For Visit
  - JT suggests, as a starting point:
    - Created -- could apply to visits scheduled but not yet happening? (optional)
• Open - [various elements can be finalized and active even while the encounter transaction is open]
  • or Created and Open could be combined, if the distinction is not necessary
  • Closed - after certain key elements (perhaps all required elements) have been finalized

• For Encounter
  • For Observations
    • draft, preliminary, final still are applicable for status (also: pending, not valid ("X"))
    • an observation (e.g., lab result) can have a "modifier" -- exception, comment (e.g., hemolyzed) -- which orders and notes would not need because the nuance is already included
    • http://www.hl7.org/FHIR/diagnosticreport.html has registered, partial, final, corrected as status values
    • https://www.hl7.org/fhir/observation.html has registered, preliminary, final, amended

• For Orders
  • Draft, Preliminary, Signed/Final, Activated

• For Notes

Most calls to the API will return only activated orders