MEDITECH Expanse Consultation Orders and Accepted Workflows



Prior to Meditech Expanse, the Provider Consultation workflow differed from division to division. In Expanse, the Order Dictionary and associated order screens will all be standardized. However, there is some flexibility in how we present the Consult Orders to end-users based on a few accepted workflows. This document will cover each of those available options. During Expanse readiness, each facility should indicate which consult workflow they would like to utilize, and the corporate Order Management team will ensure the orders are built to support that choice.

Option 1: Provider to Provider Consults

This workflow assumes that ALL consults are called from provider to provider. No nurses, clerks, or other ancillary staff are responsible for completing the consult.

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Option 2: Provider/Clinical Staff to Provider Consults

This workflow assumes that routine consults can be called by providers or other ancillary staff such as nurses or unit clerks. This option is further split into 2 groups. Option (2a) indicates that the facility supports group consults, and Option (2b) indicates that the facility does NOT support group consults. **Stat consults should still be called from provider to provider.**

				Option 2a
O∃ > Consult to Hospitalist				At time of order entry, the ordering user must answer 1 required field:
Routine		* New	10/23/23 20:26	1. Reason for consultation
Consulting Provider Consulting Provider Group	Provider 🔻			There are 3 optional fields to indicate who is being consulted:
Consult on-call provider * Reason for consultation	Yes No			 Consulting Provider Consulting Provider Group Consult on-call provider
Comment				The provider should answer 1 of these 3 fields to indicate who they desire to consult.
Consult to Hospitalist				Option 2b
Routine		* New	10/23/23 21:49	This option is identical to option 2a,
Consulting Provider	Provider 💌			with the following exceptions:
Consult on-call provider	Yes No]		• The "Consulting Provider Group" field will not appear on the
Note	Group consults not	t supported. Select an indiv	dual provider to consult.	order screen.
* Reason for consultation				
Comment				



Routine		* New	10/23/23 20:26	specified, an additional required
Consulting Provider	Provider 💌	Adams,Carolyn		field appears, asking if the provi has been notified.
Consulting Provider Group Consult on-call provider * Reason for consultation * Consulting provider notified Consulting provider notified otified date	Yes No			If it is indicated that the consulting provider has been notified, additional optional fields appear document who was notified and date/time of the notification. If it's indicated that the Consulting provider has been notified, no further action is required by the ordering user or clinical staff.
				Stat Consults
Consult to Hospitalis	st			Stat Consults If a stat direction is selected for
Stat	st	* New	10/30/23 09:22	Stat Consults If a stat direction is selected for consult order, the ordering user
Consult to Hospitalis Stat Consulting Provider	st Provider 🕶	* New	10/30/23 09:22	Stat Consults If a stat direction is selected for consult order, the ordering user must answer 3 required fields:
Consult to Hospitalis Stat Consulting Provider Note	st Provider ▼ Stat consults sho	* New	10/30/23 09:22 an to physician.	Stat Consults If a stat direction is selected for consult order, the ordering user must answer 3 required fields: 1. Consulting Provider 2. Reason for consult
Consult to Hospitalis Stat Consulting Provider Note Reason for consultation	st Provider ▼ Stat consults sho	* New	10/30/23 09:22 an to physician.	Stat Consults If a stat direction is selected for consult order, the ordering user must answer 3 required fields: 1. Consulting Provider 2. Reason for consult 3. Consulting provider notified
 > Consult to Hospitalis Stat * Consulting Provider Note * Reason for consultation * Consulting provider notified 	st Provider Stat consults sho Yes No	* New	10/30/23 09:22 an to physician.	Stat Consults If a stat direction is selected for consult order, the ordering user must answer 3 required fields: 1. Consulting Provider 2. Reason for consult 3. Consulting provider notified It's expected that stat consults a

The following scenarios will require additional follow-up by clinical staff. Please follow your local guidelines for determining who is on-call and how to notify the providers.

- If a Consulting Provider is defined, but they have NOT been notified Clinical staff are to notify the consulting provider and update the order accordingly.
- 1. If the ordering user only specified a provider group Clinical staff are to determine who is on call for that group, notify the consulting provider, and update the order accordingly.
- 2. If the ordering user only specified to use the on-call provider Clinical staff are to determine who is on call based on the specialty defined in the Order name, notify the consulting provider, and update the order accordingly.

Updating the Consult Order



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Orders			_	
CURRENT	ENTER			RECONCIL
ORDERS BY CATEGORY		PROVIDE	R	
Consults O				
Consult to Anesthesiology Routine 2		Hospital	ist01, Provide	r
Consult to Neurology Routine		Hospital	ist01, Provide	r
> Blood Bank				
> Care				

* Provider			
Hospitalist	1,Provider		
Q Other			
* Source			
Care Plan	Cutover - Expanse	Intra-Procedure	Approved

* Provider	Hospitalist01,Provider					
* Source	Department Process					
Consulting Provider	Provider 🕶 Adams,Carolyn					
Consulting Provider Group						
Consult on-call provider	Yes No					
* Reason for consultation	Testing 5					
* Consulting provider notified	Yes No					
Notified date	10/23/23					
Notified time	20:58 6					
Who was notified	Carolyn Adams					

If a nurse, unit clerk, or other clinical staff are responsible for notifying the provider, they are also responsible for updating the order to indicate the provider was notified.

To update the order, follow these steps:

- 1. Navigate to current orders
- 2. Select the Consult Order
- 3. Select an order source of "Department Process." This ensures the order does not requeue to the provider for signature.
- 4. Specify the Provider that was notified in the "Consulting Provider" field.
- 5. Select "Yes" in the "Consulting provider notified" field.
- Add details about who was notified and when it occurred as needed.
- 7. Save the changes

Adding the provider name to the "Consulting Provider" field will add the patient to the designated providers Rounding & Consultations Lists.

Surveillance

A surveillance profile called "Consult not called" has been created that will alert nurses and unit clerks of any consult orders in which the consulting provider has not been



🗖 Test,Kayla	a			
	1487965	Test,Kayla	respirator. Consult not called	11:38
			Provider	11:38
	09/15/23	35 F	Provider	
> 	ADM IN		Resus Sta	

notified. This surveillance flag will appear on the Patient Care Status board.

This surveillance is driven by the "Consulting provider notified" query on the order screens. Once a provider has been notified, staff should ensure the order is updated appropriately. Once the order is updated, and the "Consulting provider notified" field equals Yes, the surveillance alert will no longer appear.

Close

			For Sur provide	veillance Use Onl er notified	ly - Cons	sulting	No					
E Return To			Chart				Ľ⊐' ∑			e ?	SN	Close
	encer N	lash	Chart	Document +	Mul	tiple Fac	ilities 🗸	C	Find Pat	ient	USCI	Close
My List 1		• Any Lo	ocati	• More L	ists	1 (1	Ор	en]	Open Pa	tien		ve fro
Name w	vith Accou	nt Flag										
l ×	₹Room	. Preferre	. Reason	. Alert		Next Int	New Re	Orders	Unc	Next M	ed Trans	fer TAR
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			Provider.									
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Consult to Neurology

Verified

 $(\mathbf{\hat{+}})$ More Lists Op unt Flag Preferre Pre-Pregnancy Wt Missing Change List Criteria Pronour Hemodialysis Age/Sex Confide. Potential HD Select All SLED/SCUF CATH LAB / COCYKO 01 TEST,TA CRRT EMERGENCY DEPART TRAUMA / COCYKO 2 Peritoneal Dialysis 23 24 M ENCY DEPARTMENT / COCYKO Consult not called - By Location 3 Ovvaen Order COCYVO

Clinical staff can search for patients that qualify for this surveillance profile by navigating to the "Consult not called – By Location" list.

This list can be used to view all patients within a facility or specific locations in which a consulting provider has not been notified. To navigate to this list from the Patient Care Status Board:

- 1. Click "More Lists"
- Locate and select the "Consult not called – By Location" option
- 3. Select locations as needed
- 4. Click Save

Cance

Save

4

If a user would like to edit the location selections, they must:



Consulting provider notified = No 10/23/23 14:23 6 Patient has at least one consult order that has not been called. In order to resolve, call the remaining consults and update the consult order to reflect that the provider was notified. Associated Data Associated Data Consult order to reflect that the provider was notified. Consult order

Qualifying Criteria

Order Order Status

Instance

Surveillance Profile Criteria

Profile Oualified

E Chart Spencer Nash Spencer Nash Spencer Nash Spencer Nash Admit D Age/Sex A Admit S Confide C Test,Kayla 148796 Test,Kay rd	Document Orders Multip ati Consult no eason Alert N dmit P Fall Risk ttend Special Ind ode St Discharge aspirat Pref Pharm, Consu) nge List Criteria elect All ATH LAB / COCYKO MERGENCY DEPART TRAUI	Return To Home Spencer Nash Scan Patient Wris Add To My List Open Hand Off Open Hand Off Open Patient Sum Assignments: My Assignments: Tea Assignments: Car Change List Criter Home Screen Def Manage Orders (4) MA / COCYKO / COCYKO	Chart Docur tband imary List vider List m List e Provider by ria aults	Patient	 Select the hamburger icon Select "Change List Criteria" Select locations as needed Click Save
					If the Consulted Provider is moving off service, and care is being transitioned to another provider, the order should be edited, and th
CURRENT -	ENTER	RECONCILE			"Consulting Provider" field should be updated to the new provider
			E	dit Multiple	following the patient. This will
ORDERS BY CATEGORY	PROVID	ER DATE	STATUS	* *	ensure the patient appears on the
✓ Consults Consult to Hospitalist Routine Q	me	10/24/23 10:15	Ordered	C	new provider's Rounding & Consultations Lists.
Routine	Ordered	10/24/23 10:15			The order can be undeted by
Consulting Provider Pro Consulting Provider Group Consult on-call provider Y * Reason for consultation Tes	ovider Abou-ass es No ting	sali,Aida	• •		 completing the following steps: 1. Navigate to Current Orders 2. Select the appropriate consuorder 3. Update the "Consulting Provider" field with the new
* Consulting provider	as No				provider 4. Submit the changes.

