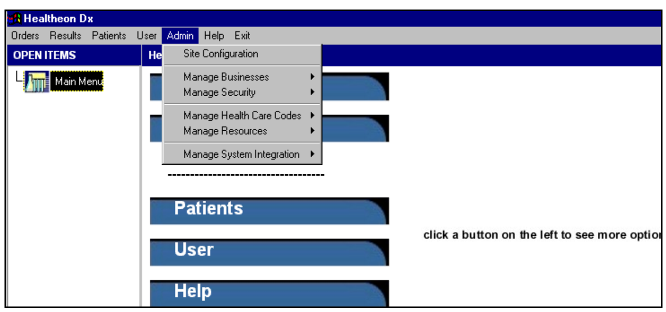
Chapter 2

Site Configuration

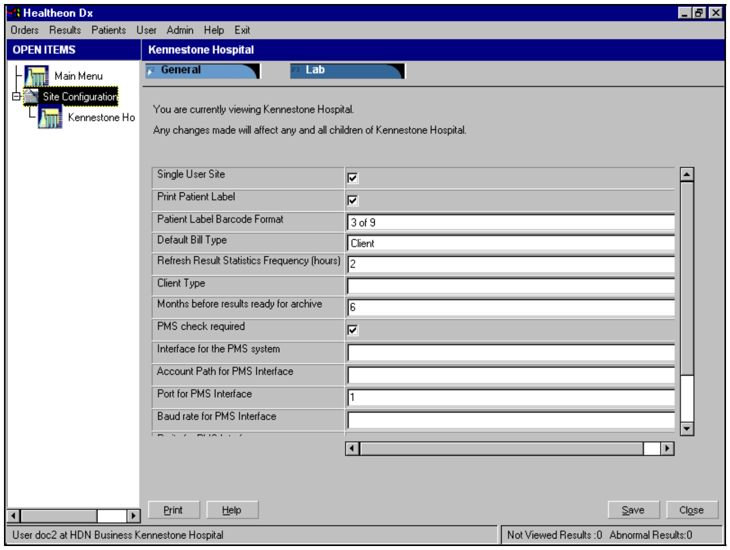
Site Configuration Overview

Before using the **Admin** menu options to configure your site, it is important to have an understanding of Health Data Network (HDN) Businesses, and how they relate to other system components. You must also understand the concept of parent-child relationships in order to successfully maintain your site.

Healtheon Dx is a laboratory order entry and results reporting system that can interface to multiple labs simultaneously and seamlessly. The **Site Configuration** option in the **Admin** menu enables you to support and manage this important feature of Dx and provides you the flexibility needed to define relationships between your site and several laboratories.

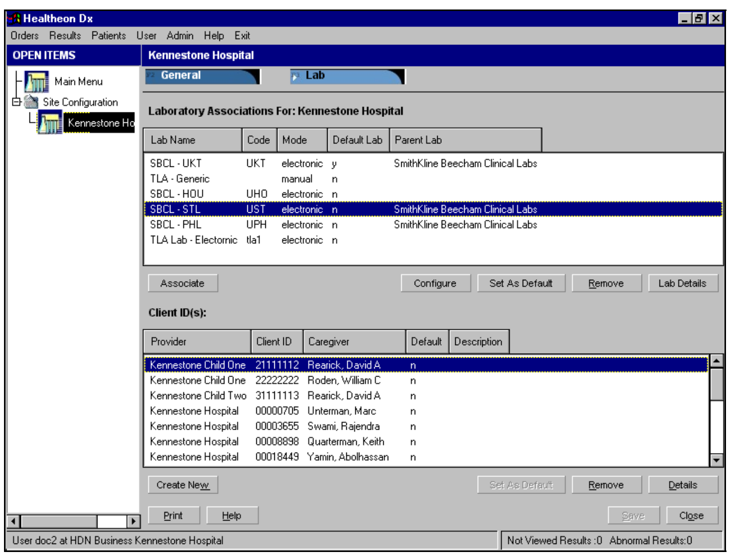


When selected, the **Site Configuration** window appears with the **General** page active.



This **General** page is used to specify HDN Business level interface settings that affect how the system works.

The **Lab** page is used to define and maintain information on provider-lab associations. Before an order can be sent from a Provider HDN Business to a performing lab, that business must have at least one lab association and one client ID for that association.



From this page, you carry out the following functions:

- Create, configure and maintain associations between a provider and multiple labs
- View and/or modify detailed lab information
- Create Client IDs for each provider-lab association
- View and/or modify information on existing Client IDs

- Print configuration data, lab association information and Client IDs for a provider

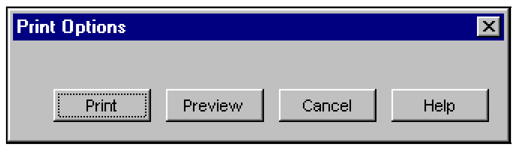
For more information, see the following:

- "Administrative Security Consideration in Healtheon Dx" in Chapter 1, "Introduction"
- "Site Configuration - General Page" on page 2-4
- "Site Configuration - Lab Page" on page 2-7

To Print Site Configuration Details

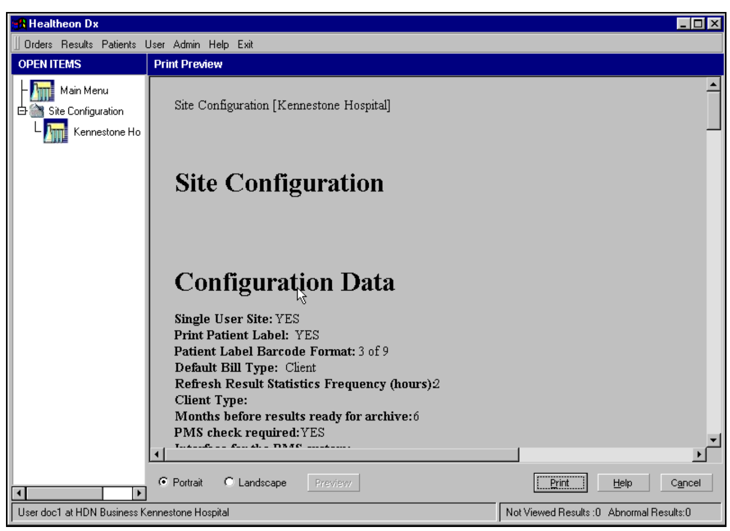
Use the following procedure to print site configuration details.

1. With the **Site Configuration Details** window open, click **Print**. The **Print Options** dialog box appears.



2. Proceed as follows:

- To print the details to a printer or file, click **Print**. The Microsoft Windows **Print** dialog box appears.
  - Change the print settings as needed, and click **OK**.
  - To terminate printing, click **Cancel**.
- To preview the details before printing, click **Preview**. The **Print Preview** window appears.



  - To change the orientation of the details from portrait to landscape, click **Landscape** and then **Preview**.

– To change the orientation of the details from landscape to portrait, click **Portrait** and then **Preview**.

– To print the details to a printer or file, click **Print**. The Microsoft Windows **Print** dialog box appears. Change the print settings as needed, and click **OK**.

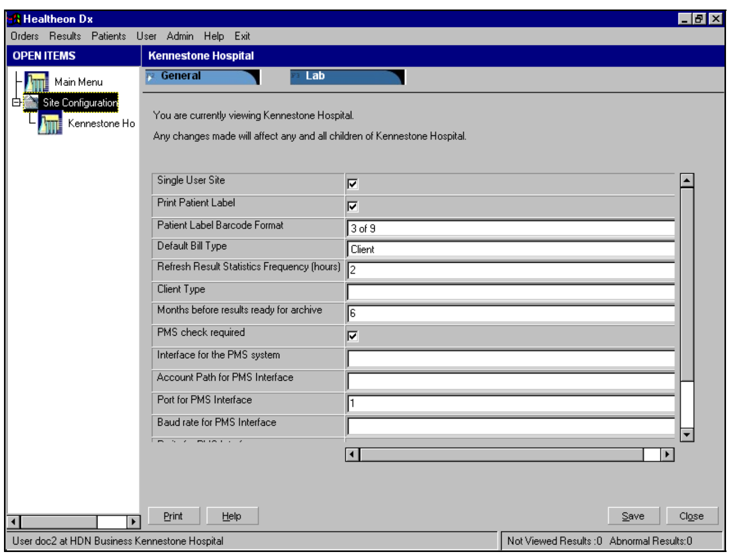
– To terminate printing, click **Cancel**.

For more information, see the following:

- ♦ "Site Configuration Details" on page 2-6
- ♦ "Site Configuration Client ID List Headings" on page 2-17

Site Configuration - General Page

When you select **Site Configuration** from the **Admin** menu, the **General** page appears with the configuration settings for the HDN Business where you are currently logged in.



To modify the configuration data on this table you must be working on the parent HDN Business. When you view a child HDN Business, the configuration data that appears on the screen is that of the parent HDN Business. Any configuration data that is defined at the parent level appears grayed out on the configuration table and cannot be modified.

Although every site has its own policy regarding what permissions a user can have, in general, only Healtheon field service and help desk representatives are allowed to define or modify configuration information.

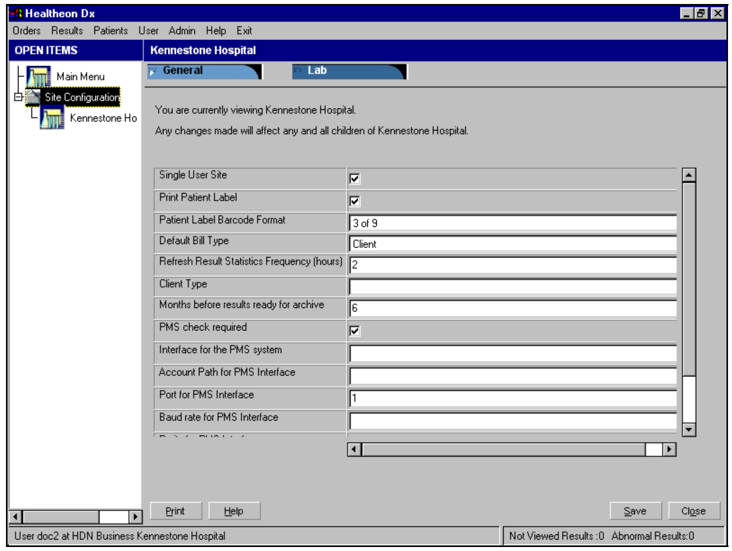
For more information, see the following:

- "Administrative Security Consideration in Healtheon Dx" in Chapter 1, "Introduction"

To Modify General Site Configuration Details

Use the following procedure to configure a site.

1. Choose **Site Configuration** from the **Admin** menu. The **Site Configuration Details** window appears with the **General** page active.



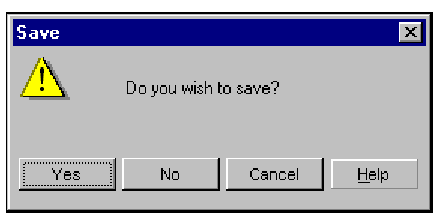
2. Proceed as follows:

   - Modify the fields on the **Site Configuration Details** window as needed.

   - To save the information, click **Save**. Click **Save** often while working with the **Site Configuration Details** window to prevent losses in the event of a system or workstation failure.

   - To print the configuration data you just entered, click **Print**.

3. When finished, click **Close**. If you entered or changed information in any of the data fields and have not clicked the **Save** button, the **Save** dialog box appears.



   - Click **Yes** to save the changes and close the **Site Configuration Details** window.

- Click **No** to lose the changes and close the **Site Configuration Details** window.
- Click **Cancel** to return to the **Site Configuration Details** window without saving the changes.

For more information, see the following:

- ♦ "Site Configuration Details" on page 2-6
- ♦ "To Modify General Site Configuration Details" on page 2-5
- ♦ "To Print Site Configuration Details" on page 2-3

Site Configuration Details

The following table contains definitions for the fields on the **General** page of the **Site Configuration Details** window.

A message appears at the top of this page indicating the name of the HDN Business you are currently viewing, which in most cases is also the active HDN Business where you are logged in.

Field Name	Definition
Account Path for PMS Interface	This is the account path for the PMS interface.
Baud rate for PMS Interface	This is the baud rate for the PMS interface.
Client Type	This is the client type. Select a value from the drop-down list.
Databits for PMS Interface	This is the number of databits for the PMS interface.
Default Bill Type	This is the default bill type. Select a value from the drop-down list: Client, Patient or Third Party. The value selected appears as the default Bill Type when creating a requisition.
Interface for the PMS system	This is the interface for the PMS system.
Months before results are ready to archive	This is the number of months before results are ready to be archived.
Parity for PMS Interface	This is the parity for the PMS interface.
Patient Label Barcode Format	This indicates the method used for encoding information in the patient label bar code. Select a value from the drop-down list.
PMS check required	This box tells the system to search for patient records in the Practice Management System.
Port for PMS Interface	This is the port for the PMS interface.

Field Name	Definition
Print Patient Label	This indicates if patient labels are printed. If this box is selected, a label is printed when a requisition is created, as long as a label printer is attached to the workstation where the requisition is created. Labels are placed on specimens for identification purposes.
Refresh Results Statistics Frequency (hours)	This is the frequency at which the results statistics in the main screen status bar are updated. (Not Viewed Results, Abnormal Results)
Single User Site	This indicates if the site is a single user site.
Stopbits for PMS Interface	This is the number of stopbits for the PMS interface.

For more information, see the following:

- "To Modify General Site Configuration Details" on page 2-5
- "To Print Site Configuration Details" on page 2-3

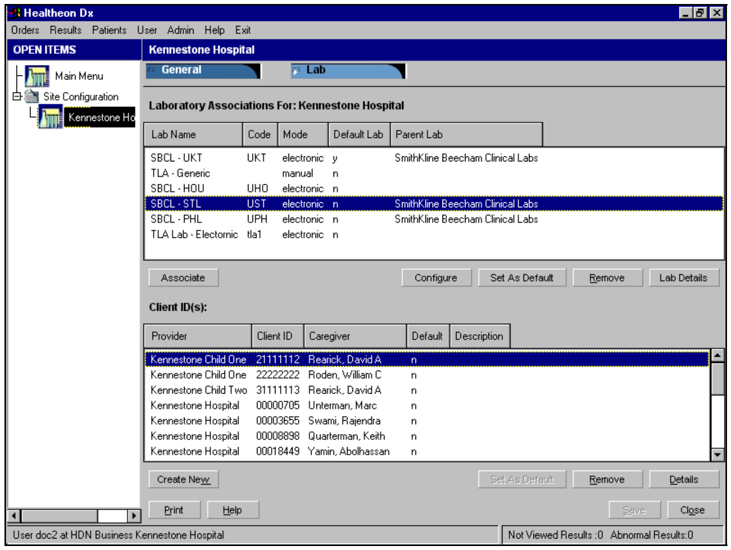
Site Configuration - Lab Page

Providers can send orders through either parent or child labs, as long as they are orderable labs. Orderable labs are those that a client can directly send orders to. For every set of labs associated with a provider, one of the labs must be setup as the default lab.

The relationship between a Provider HDN Business and a Lab is defined by two important pieces of information:

1. The set of Labs associated with the Provider
2. The set of Client IDs linked to the Provider

The **Lab** page contains all the functions you need to manage this information.



Site Configuration Details Lab Page

The following table shows the different functions available for maintaining lab associations:

Button Name	Function
Associate	Performs a search of existing orderable labs. This function allows you to add, delete and print information on orderable labs.
Configure	Displays the property or configuration window for a lab association.
Lab Details	Displays detailed information on the selected lab.
Remove	Removes the selected provider-lab association. This does not remove the lab, just the association with the lab.
Set As Default	Sets the lab in the selected lab association as the default lab.

The following table shows the different functions available for maintaining a set of client IDs.

Button Name	Function
Create New	Creates a new Client ID for the active Provider HDN Business and the selected Lab or a Caregiver. This button is disabled until a Lab Association is selected.
Details	Displays details of the selected Client ID.
Remove	Removes the selected Client ID.
Set As Default	Sets the selected Client ID as the default.

The following table contains definitions of the list column headings on the **Laboratory Associations** window.

Column Heading	Definition
Code	This is a 3 character code for the lab.
Default Lab	This indicates if the lab is a default lab. There can only be one default lab for every Provider HDN Business - Lab association.
Lab Name	This is the name of the lab.
Mode	This is the lab transmission mode.
Parent Lab	This is the name of the parent lab. For parent labs, this column is empty.

The following table contains definitions of the list column headings on the **Site Configuration Client IDs** window.

Column Heading	Definition
Caregiver	This is the name of the physician to whom the provider client ID is assigned.
Client ID	This is the lab assigned identifier for the provider.
Default	This indicates if the client ID is the default ID for the provider.
Description	This is a description of the associated provider caregiver.
Provider	This is the name of the provider to whom the client ID is assigned.

For more information, see the following:

- "To Configure a Lab Association" on page 2-11
- "To Create a New Lab Association" on page 2-10
- "To Remove a Lab Association" on page 2-16
- "To Set up a Default Lab Association" on page 2-15
- "To Get Details of an Existing Lab", Chapter 3, "Manage Businesses"

Working with Provider Lab Associations

The **Laboratory Associations** portion of the **Site Configuration Details** window allows you to define and maintain associations between your site and various labs. These lab associations must be defined before a Provider HDN Business can send orders to one or more labs.

The associations between a Provider HDN Business and a set of orderable labs can only be defined at the parent level. Child HDN Businesses inherit the lab associations of their parent HDN Businesses.

Management and creation of lab detail information is done primarily through the **Labs** subsystem of the **Manage Businesses** menu option; however, you can also view and modify lab detail information on any lab that is accessed through the **Site Configuration Details** window.

In the **Laboratory Associations** section of the **Lab** page you carry out the following functions:

- Create and configure associations between a site and one or more labs
- View and/or modify detailed information on existing labs
- Print lab association information

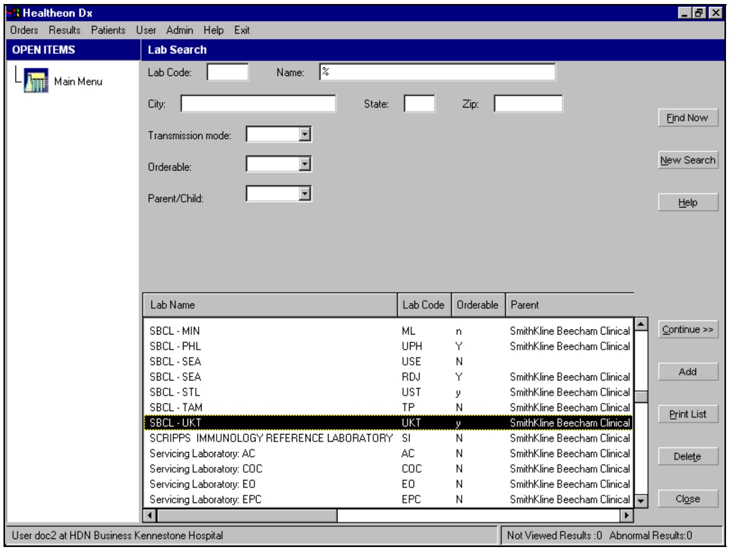
For more information, see the following:

- "Labs", Chapter 3, "Manage Businesses"
- "To Create a New Lab Association" on page 2-10

To Create a New Lab Association

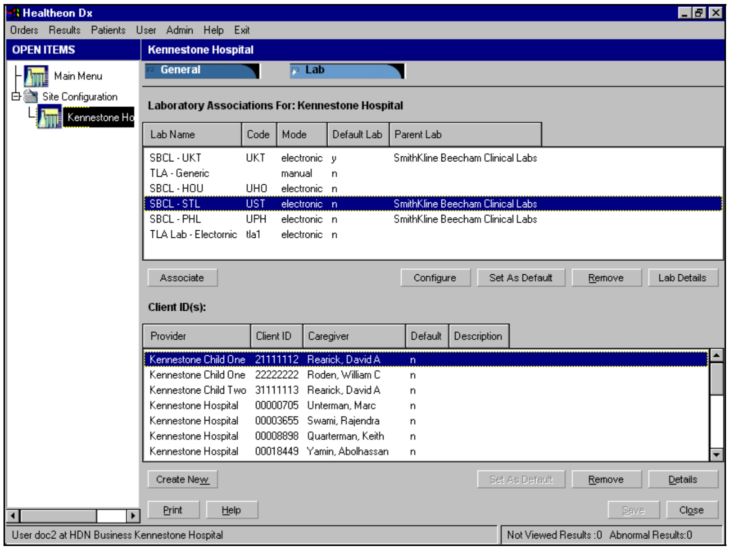
Use the following procedure to create a new provider-lab association.

1. With the **Lab** page of the **Site Configuration Details** window active, click **Associate**. A blank **Find Lab** window appears.



2. Enter search criteria to find the lab you want to associate with the provider. Remember, only orderable labs will appear in the search results.

3. Select a lab from the results list and click **Continue**. The lab is added to the list in the **Lab Association** list.



4. When finished, click **Close**.

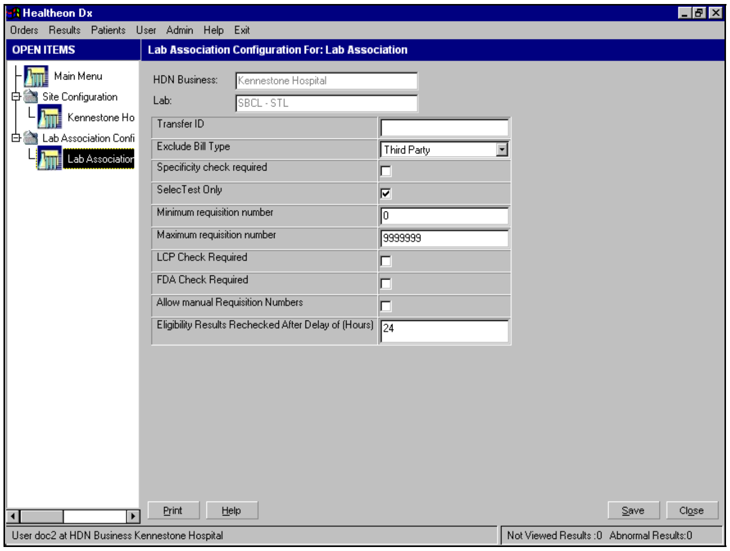
For more information, see the following:

- "Find Lab List Headings", "To Create a New Lab" and "To Find an Existing Lab" in Chapter 3, "Manage Businesses"

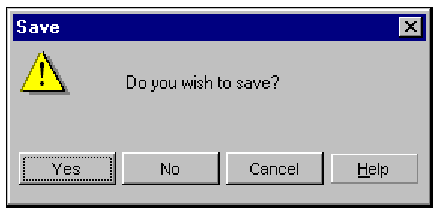
To Configure a Lab Association

Use the following procedure to configure a provider-lab association.

1. With the **Lab** page of the **Site Configuration Details** window active, highlight the provider-lab association you want to configure and click **Configure**. The **Lab Association Configuration** window appears.



2. Proceed as follows:
   - Modify the fields on the page as needed.
   - To save the information, click **Save**. Click **Save** often while working with the **Lab Association Configuration** window to prevent losses in the event of a system or workstation failure.
   - To print the lab association configuration data, click **Print**.
3. When finished, click **Close**.
   - If you have not entered or changed information in any of the data fields since the last time you saved the record, the **Lab Association Configuration** window closes and the **Site Configuration Details** window appears.



     – Click **Yes** to save the changes and close the **Lab Association Configuration** window. The **Site Configuration Details** window appears with the **Lab** page active.

     – Click **No** to lose the changes and close the **Lab Association Configuration** window. The **Site Configuration Details** window appears with the **Lab** page active.

     – Click **Cancel** to return to the **Lab Association Configuration** window without saving the changes.

For more information, see the following:

- "Lab Association Configuration" on page 2-13
- "To Create a New Lab Association" on page 2-10
- "To Print Lab Association Configuration Details" on page 2-14

Lab Association Configuration

The following table contains definitions for the fields found on the **Lab Association Configuration** window:

Field Name	Definition
Allow manual Requisition Numbers	If this box is selected, manual requisition numbers can be entered when creating a requisition. Otherwise, each new requisition uses a number generated by the system. Healtheon Dx automatically generates requisition numbers every time a new requisition is created, regardless of this setting. When this box is selected, the system still generates a requisition number but the user has the option of changing the requisition number.
Eligibility Results Rechecked After Delay of (Hours)	This field applies primarily to Future requisitions. If eligibility has been verified for a requisition, patient or insurance within the specified number of hours, it will not be re-checked. Otherwise, it will have to be verified again.
Exclude Bill Type	Contains a drop-down list with three possible values: Client, Patient or Third Party. If a value is selected then that Bill Type cannot be used when creating a requisition.
FDA check required	When this box is selected, if Bill Type = Third Party and the patient has a limited coverage policy, such as Medicare, and a non FDA-compliant test code is used in a requisition, the ABN Dialog box appears. An Advanced Beneficiary Notice (ABN) is a printed statement that contains a list of tests not covered by the payer.
HDN Business	The Provider HDN Business being linked to a lab. Also, the currently active HDN Business. This is a read only field and can not be modified.
Lab	The Lab associated with the Provider. This is a read only field and can not be modified.
LCP check required	When this box is selected, if Bill Type = Third Party and the patient has a limited coverage policy, such as Medicare, and a non LCP-compliant test code is used in a requisition, the ABN Dialog box appears. An Advanced Beneficiary Notice (ABN) is a printed statement that contains a list of tests not covered by the payer.

Field Name	Definition
Maximum requisition number	This field is used to designate the maximum requisition number that can be entered, regardless of whether manual or automatic requisition numbers are used.
Minimum requisition number	This field is used to designate the minimum requisition number that can be entered, regardless of whether manual or automatic requisition numbers are used.
Selec Test Only	Accepts one of two possible values. YES or NO. Only those clients who use test codes created by SBCL have this setting turned on.
Specificity check required	When this box is selected, if a user enters an ICD-9 code in a requisition that has more specific designations or codes, the user is required to select a more specific ICD-9 code instead of the non-specific one.
Transfer ID	A unique identifier assigned to each site. This field is used during the process of uploading and downloading results. Multiple client IDs may map to the same transfer ID.

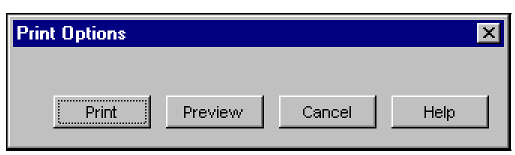
For more information, see the following:

- "To Configure a Lab Association" on page 2-11
- "To Create a New Lab Association" on page 2-10
- "To Print Lab Association Configuration Details" on page 2-14

To Print Lab Association Configuration Details

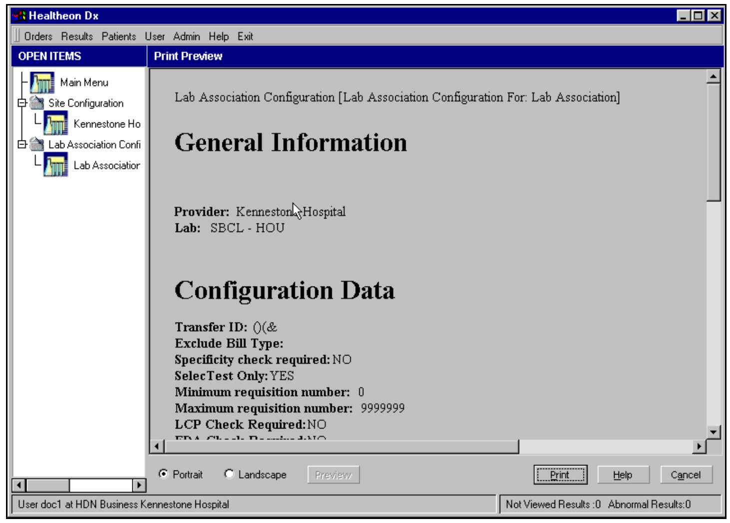
Use the following procedure to print lab association configuration details.

1. On the **Lab Association Configuration** window, click **Print**. The **Print Options** dialog box appears.



2. Proceed as follows:
   - To print the details to a printer or file, click **Print**. The Microsoft Windows **Print** dialog box appears.
     - Change the print settings as needed, and click **OK**.
     - To terminate printing, click **Cancel**.

- To preview the details before printing, click **Preview**. The **Print Preview** window appears.



  – To change the orientation of the details from portrait to landscape, click **Landscape** and then **Preview**.

  – To change the orientation of the details from landscape to portrait, click **Portrait** and then **Preview**.

  – To print the details to a printer or file, click **Print**. The Microsoft Windows **Print** dialog box appears. Change the print settings as needed, and click **OK**.

  – To terminate printing, click **Cancel**.

  When finished printing, the **Lab Association Configuration** window appears.

For more information, see the following:

- "To Configure a Lab Association" on page 2-11
- "Lab Association Configuration" on page 2-13

To Set up a Default Lab Association

For every set of labs associated with a provider, one lab must be selected as the default lab. The default laboratory is the one assigned to a provider for requisitions that have patient or client billing. However, when creating a requisition, a user can send the order to any lab associated with the provider HDN Business, even if another lab has been defined as the default lab.

There can only be one default lab for every site, so when you designate a lab as the default, this overrides any previous default settings.

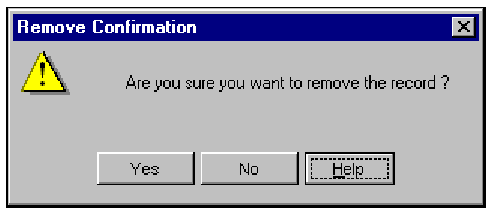
Use the following procedure to designate a provider-lab association as the default.

1. With the **Lab** page of the **Site Configuration Details** window active, highlight the lab you want to designate as the default lab.
2. Click **Set As Default**.
3. The selected lab becomes the default lab and a "Y" appears in the **Default Lab** column heading.

To Remove a Lab Association

Use the following procedure to remove a provider-lab association.

1. With the **Lab** page of the **Site Configuration Details** window active, highlight the lab whose association with the provider you want to remove and click **Remove**. The **Remove Confirmation** window appears.

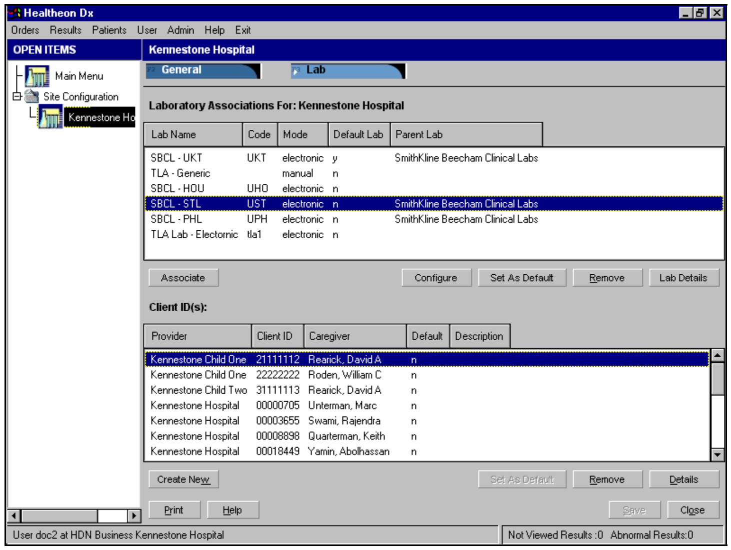


2. Proceed as follows:
   - To remove the provider-lab association, click **Yes**. The **Lab Association** window appears with the provider-lab removed from the list. Removing the provider-lab association does not remove the lab from the system, only the association between the provider and the lab. You can easily re-establish the association by adding the lab to the provider.
   - To keep the provider-lab association, click **No**. The **Lab Association** window appears with the payer still on the list.

Working with Provider-Lab Client IDs

The **Client IDs** portion of the **Site Configuration Details** window allows you to create and maintain client ID information for your site. Client IDs are used for billing and for distributing lab results. Providers must have Client IDs in order for them to be able to send orders to a lab. In addition to the default client ID for your site, you can also have numerous client IDs associated to different caregivers and to your site.

For businesses that have a parent-child relationship, the workstation client IDs are linked to the child HDN Businesses so that the results ordered can be returned to the HDN Businesses that originated the orders.



To support the proper distribution of results based on client ID, client IDs can be stored at the parent or at the child HDN Business level. The only restriction is that they must always be stored with an orderable lab.

In the **Client IDs** section of the **Lab** page you carry out the following functions:

- Create Client IDs for each provider-lab association
- View and/or modify information on existing Client IDs
- Print information on Client IDs

Site Configuration Client ID List Headings

For more information, see the following:

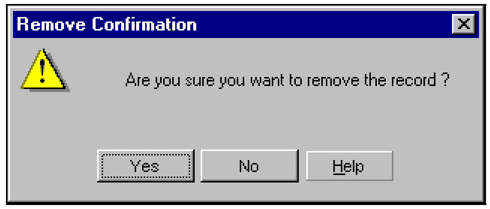
- "To Create a New Provider-Lab Client ID" on page 2-18
- "To Get Details of an Existing Provider-Lab Client ID" on page 2-19
- "To Print Provider-Lab Client ID Details" on page 2-22
- "To Remove a Provider-Lab Client ID" on page 2-17
- "To Set up a Default Provider-Lab Client ID" on page 2-23

To Remove a Provider-Lab Client ID

Use the following procedure to remove a client ID from a provider-lab association. Removing a provider-client ID from the **Provider-Lab Client ID** page is the same as deleting the client ID from the **Site Configuration Client ID** list. A default client ID can not be removed.

1. With the **Lab** page of the **Site Configuration Details** window active, highlight the client ID you want to remove from the active

provider-lab association and click **Remove**. The **Remove Confirmation** window appears.



2. Proceed as follows:

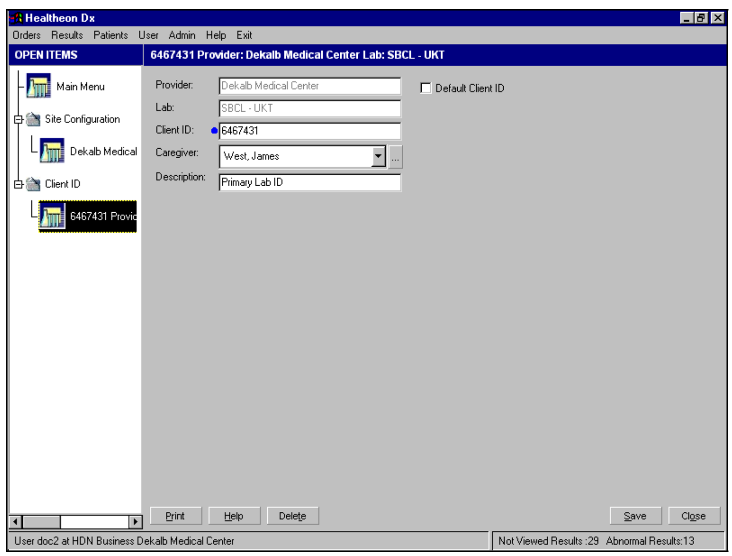
   - To remove the provider-lab client ID, click **Yes**. The **Site Configuration Client ID** list appears with the client ID removed from the list.

   - To keep the provider-lab client ID, click **No**. The **Site Configuration Client ID** list appears with the client ID still on the list.

To Create a New Provider-Lab Client ID

Use the following procedure to create a new client ID for a provider-lab association.

1. With the **Lab** page of the **Site Configuration Details** window active, click the **Create New** button under **Client IDs**. A blank **Provider-Lab Client ID Details** window appears.



2. Complete the fields on the page.

3. Proceed as follows:

   - Click **Save**. Click **Save** often while working with the **Provider-Lab Client ID Details** window to prevent losses in the event of a system or workstation failure.

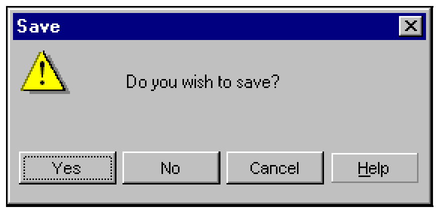
- To print the provider-lab client ID record you just created, click **Print**.

- To delete the provider-lab client ID record you just created, click **Delete**.

4. When finished, click **Close**.

   - If you have not entered or changed information in any of the data fields since the last time you saved the record, the **Provider-Lab Client ID Details** window closes and the **Site Configuration Details** window appears.

   - If you entered or changed information in any of the data fields since the last time you saved the record, the **Save** dialog box appears.



   – Click **Yes** to save the changes and close the **Provider-Lab Client ID Details** window. The **Site Configuration Details** window appears.

   – Click **No** to lose the changes and close the **Provider-Lab Client ID Details** window. The **Site Configuration Details** window appears.

   – Click **Cancel** to return to the **Provider-Lab Client ID Details** window without saving the changes.

For more information, see the following:

♦ "Provider-Lab Client ID Details" on page 2-21

♦ "To Delete a Provider-Lab Client ID" on page 2-23

♦ "To Get Details of an Existing Provider-Lab Client ID" on page 2-19

♦ "To Print Provider-Lab Client ID Details" on page 2-22

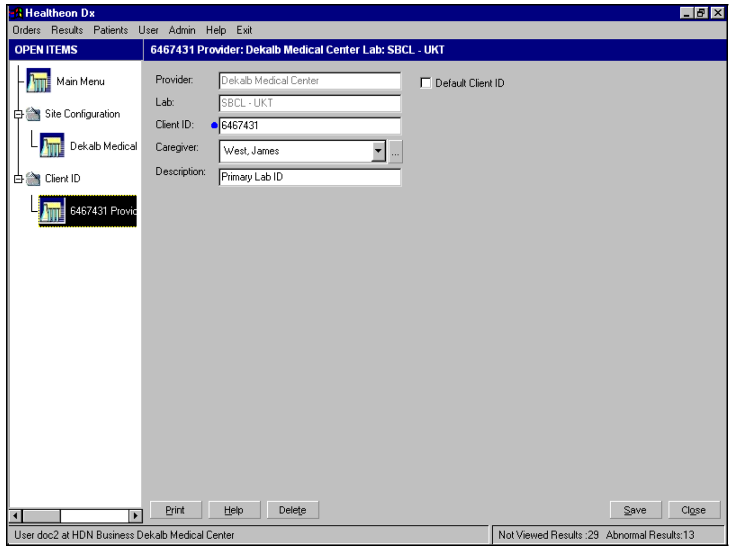
♦ "To Remove a Provider-Lab Client ID" on page 2-17

To Get Details of an Existing Provider-Lab Client ID

Use the following procedure to get details of an existing provider-lab client ID.

1. With the **Lab** page of the **Site Configuration Details** window active, highlight a provider-lab client ID and click **Details**. The

Provider-Lab Client ID Details window appears for the selected provider-lab client ID.



2. Proceed as follows:

   - Modify the fields on the page as needed and click **Save**. Click **Save** often while working with the **Provider-Lab Client ID Details** window to prevent losses in the event of a system or workstation failure.

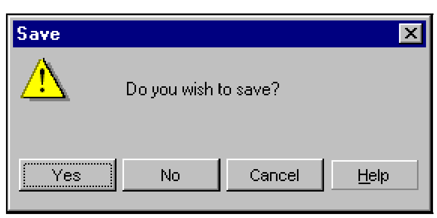
   - To print the provider-lab client ID record, click **Print**.

   - To delete the provider-lab client ID record, click **Delete**.

3. When finished, click **Close**.

   - If you have not entered or changed information in any of the data fields since the last time you saved the record, the **Provider-Lab Client ID Details** window closes and the **Site Configuration Details** window appears.

   - If you entered or changed information in any of the data fields since the last time you saved the record, the **Save** dialog box appears.



     – Click **Yes** to save the changes and close the **Provider-Lab Client ID Details** window. The **Site Configuration Details** window appears.

– Click **No** to lose the changes and close the **Provider-Lab Client ID Details** window. The **Site Configuration Details** window appears.

– Click **Cancel** to return to the **Provider-Lab Client ID Details** window without saving the changes.

For more information, see the following:

- "Provider-Lab Client ID Details" on page 2-21
- "To Create a New Provider-Lab Client ID" on page 2-18
- "To Delete a Provider-Lab Client ID" on page 2-23
- "To Print Provider-Lab Client ID Details" on page 2-22
- "To Remove a Provider-Lab Client ID" on page 2-17

Provider-Lab Client ID Details

The following table contains definitions for the fields found on the **Provider-Lab Client ID Details** window.

Field Name	Definition
Caregiver	Optional. This is the name of the physician to whom the provider client ID is assigned. If no physician is selected, the client ID is defined for the provider.
Client ID	Required. This is the lab assigned identifier for the provider.
Default Client ID	This check box indicates if the client ID is the default ID for the provider. A provider can only have one default Client ID.
Description	Optional. This is a description of the associated provider caregiver.
Lab	This is the lab associated with the provider. This field can not be modified.
Provider	This is the name of the provider to whom the client ID is assigned. This field can not be modified.

For more information, see the following:

- "Caregiver Field" in Appendix B, "Common Procedures"
- "To Create a New Provider-Lab Client ID" on page 2-18
- "To Delete a Provider-Lab Client ID" on page 2-23
- "To Get Details of an Existing Provider-Lab Client ID" on page 2-19

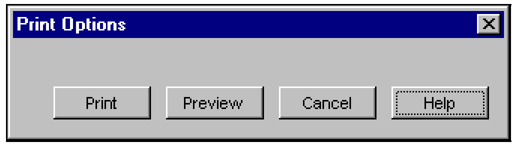
♦ "To Print Provider-Lab Client ID Details" on page 2-22

♦ "To Remove a Provider-Lab Client ID" on page 2-17

To Print Provider-Lab Client ID Details

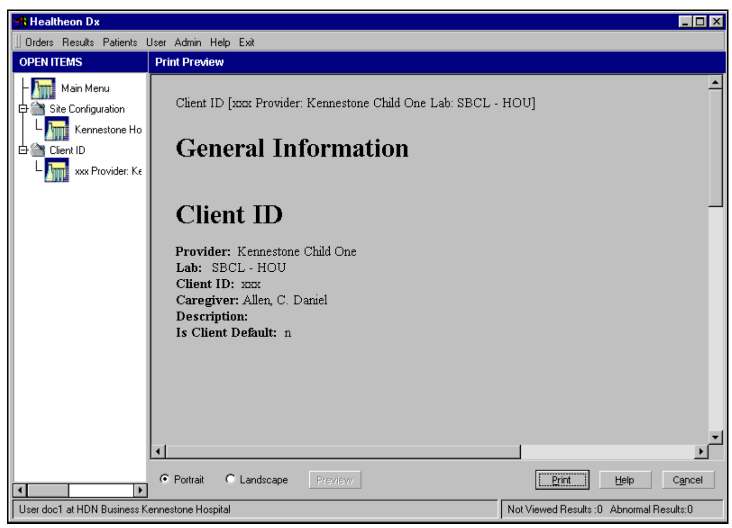
Use the following procedure to print the provider-lab client ID details.

1. With the **Provider-Lab Client ID Details** window open, click **Print**. The **Print Options** dialog box appears.



2. Proceed as follows:

   - To print the details to a printer or file, click **Print**. The Microsoft Windows **Print** dialog box appears.
     - – Change the print settings as needed, and click **OK**.
     - – To terminate printing, click **Cancel**.
   - To preview the details before printing, click **Preview**. The **Print Preview** window appears.



     - – To change the orientation of the details from portrait to landscape, click **Landscape** and then **Preview**.
     - – To change the orientation of the details from landscape to portrait, click **Portrait** and then **Preview**.
     - – To print the details to a printer or file, click **Print**. The Microsoft Windows **Print** dialog box appears. Change the print settings as needed, and click **OK**.

– To terminate printing, click **Cancel**.

When finished printing, the **Provider-Lab Client ID Details** window appears.

For more information, see the following:

- "Provider-Lab Client ID Details" on page 2-21
- "To Create a New Provider-Lab Client ID" on page 2-18
- "To Get Details of an Existing Provider-Lab Client ID" on page 2-19

To Set up a Default Provider-Lab Client ID

For every set of client IDs associated with a provider, one ID must be selected as the default client ID.

Use the following procedure to designate a provider-lab Client ID as the default.

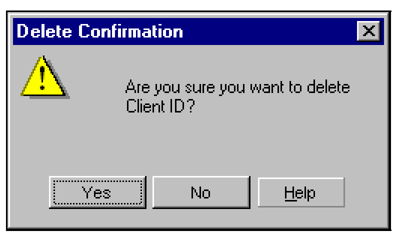
1. With the **Lab** page of the **Site Configuration Details** window active, highlight the client ID you want to designate as the default client ID and click **Set As Default**.
2. The selected client ID becomes the default client ID for the selected provider and a "Y" appears in the **Default** column heading.

   The **Set As Default** button is only enabled when you select a Provider-Lab Client ID that is **not** associated with a Caregiver.

To Delete a Provider-Lab Client ID

Use the following procedure to delete the active provider-lab client ID.

1. With the **Provider-Lab Client-ID Details** window open, click **Delete**. The **Delete Confirmation** dialog box appears.



2. Proceed as follows:
   - Click **Yes** to permanently delete the provider-lab client ID record.
   - Click **No** to keep the provider-lab client ID record and return to the **Lab** page of the **Site Configuration Details** window.

For more information, see the following:

- "To Create a New Provider-Lab Client ID" on page 2-18

- "To Get Details of an Existing Provider-Lab Client ID" on page 2-19