



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Laboratory Accession GUI

(BLGU)

User Manual

Version 1.0
April 2014

Office of Information Technology (OIT)
Albuquerque, New Mexico

Table of Contents

Preface	v
1.0 Introduction.....	1
2.0 Getting Started	2
2.1 Log On To the System.....	2
2.2 Adding the Lab Accession Component to RPMS-EHR.....	3
2.2.1 Security	3
2.2.2 Adding the Lab Accession Tab.....	3
2.3 Notifications.....	8
3.0 Orientation	10
3.1 Definitions.....	11
3.2 Basic Window Layout	11
3.3 Ribbon Bar.....	12
3.3.1 Tasks Tab.....	12
3.3.2 Manage Tab	14
3.3.3 LEDI Site Manifest Functionality	16
3.3.4 GIS Site Manifest Functionality	17
3.4 Patients Pane	18
3.4.1 Collection Type	19
3.4.2 Ordered Date.....	20
3.4.3 Accession History.....	21
3.5 Tasks Pane.....	22
3.6 Refreshing the Patient Workspace.....	23
3.7 Pane Size Adjustment	23
4.0 Completing Accession Tasks.....	24
4.1 Accessioning Orders	24
4.2 Using the Patient Workspace (Searching for Patients)	34
4.3 Using the Ordered Date Workspace Functions.....	36
5.0 Manifest Functions (Using the Manage Tab)	37
5.1 LEDI Manifest Functions	37
5.1.1 Building Manifests	37
5.1.2 Starting Manifests.....	39
5.1.3 Adding or Removing Accessions To or From Manifests.....	40
5.1.4 Closing and Shipping Manifests	42
5.1.5 Maintenance.....	43
5.1.6 Using the Order/Test Status Function	45
5.1.7 Using the Delete Function	47
5.2 GIS Manifest Functions	49
5.2.1 Re-printing Manifests	49
5.2.2 Re-Printing Labels.....	50

5.2.3	Using the Order/Test Status Function	51
5.2.4	Using the Delete Function	53
6.0	Contact Information	56

Table of Figures

Figure 1. BLR Master Control File	2
Figure 2. Design Mode Selected	4
Figure 3. Design Mode Menu Bar	4
Figure 4. Design Mode Menu	4
Figure 5. Layout Manager Window	5
Figure 6. Select Tabbed Notebook	5
Figure 7. Properties for Tabbed Notebook Window	5
Figure 8. Add Lab Accession Tab	6
Figure 9. Click Add to Add the Lab Accession Tab	6
Figure 10. List of Objects	7
Figure 11. Adding Lab Accession Object	7
Figure 12. Save as Template Command	8
Figure 13. Exiting Design Mode	8
Figure 14. Laboratory Accession Process Workflow	10
Figure 15. Basic Screen Layout	11
Figure 16. Lab Accession Ribbon Bar	12
Figure 17. Tasks Tab with Selected Patient Order Detail	13
Figure 18. Selected Patient Information	13
Figure 19. Adjust Days to Accession	14
Figure 20. Manage Tab Example	15
Figure 21. Patient Workspace	19
Figure 22. Collection Type Groupings	20
Figure 23. Ordered Date Workspace	21
Figure 24. Accession History Workspace	22
Figure 25. Tasks Pane with Patient Selected	23
Figure 26. Refresh Data Button	23
Figure 27. Accession Printer Defined	24
Figure 28. Order Summary Before Accessioning	25
Figure 29. Accession Button	25
Figure 30. Accession Pane Before Accessioning	25
Figure 31. Selecting a Different User	26
Figure 32. Select New Date and/or Time	27
Figure 33. Insurance Option Buttons	27
Figure 34. Accessioning Patient with Third Party Insurance (Adding Diagnosis)	28
Figure 35. Select Diagnoses	29
Figure 36. Client Insurance Button Accession Screen Example	30
Figure 37. Patient Insurance Button Accession Screen Example	31
Figure 38. Accession Question and Answer Screen	33
Figure 39. Search by Patient Name in Patient Workspace	35
Figure 40. Search by HRN in Patient Workspace	36
Figure 41. Build Manifest Icon	37
Figure 42. Build Manifest Window	38
Figure 43. Start Manifest Icon	39

Figure 44. Start New Manifest Confirmation Pop-Up	39
Figure 45. Start Invoice and Add Tests	40
Figure 46. Select a Manifest to Add/Remove Accessions	40
Figure 47. Add/Remove Manifest Icon	41
Figure 48. Click to Select Tests to Add (or Remove) to/from Manifest	41
Figure 49. Remove Selected Test(s) Confirmation	41
Figure 50. Close/Ship Manifests Icon.....	42
Figure 51. Close/Ship Manifest Tab.....	42
Figure 52. Select a Printer for Manifest Print	43
Figure 53. Maintenance Icon	44
Figure 54. Manifest Maintenance Tab	44
Figure 55. Order/Test Status Icon.....	45
Figure 56. Search by Name, DOB, SSN or HRN	45
Figure 57. View Order/Test Status Report.....	46
Figure 58. Delete Icon	47
Figure 59. Delete Test with Discharge Reason and NP Example	47
Figure 60. Select a Reason.....	48
Figure 61. Delete Selected Test(s) Confirmation Box.....	49
Figure 62. Re-Print Manifest Icon.....	49
Figure 63. Selecting Accession Numbers to Print in Manifest	50
Figure 64. Re-Print Label Icon.....	50
Figure 65. Selecting UIDs to Re-Print Labels	51
Figure 66. Order/Test Status Icon.....	51
Figure 67. Search by Name, DOB, SSN or HRN	52
Figure 68. View Order/Test Status Report.....	53
Figure 69. Delete Icon	54
Figure 70. Delete Test with Discharge Reason and NP Example	54
Figure 71. Select a Reason.....	55
Figure 72. Delete Selected Test(s) Confirmation Box.....	55

Preface

This manual provides information required to understand and use the IHS Laboratory Accession for Windows component. The component is based on an easy-to-use Graphical User Interface (GUI) providing guidance to a broad range of users within IHS medical facilities.

The IHS Laboratory Accession for Windows component uses security keys to limit the user's ability to change system set-up parameters and patient information. Therefore, not all features are available to all users. Contact your Clinical Application Coordinator (CAC) to determine or change your security keys.

Rules of Behavior

All RPMS users are required to observe HHS and IHS Rules of Behavior regarding patient privacy and the security of both patient information and IHS computers and networks. This document provides RPMS Rules of Behavior.

1.0 Introduction

The task of accessioning a laboratory order has been traditionally performed by laboratory professionals using the roll and scroll RPMS laboratory menu options.

Functionality at some small I/T/U sites requires that non-laboratorians (personnel that are unfamiliar with the RPMS LIS) must log on to the RPMS Laboratory Information System (LIS) to accession laboratory orders. The accessioning process is intuitive to laboratory professionals, but is not intuitive to non-laboratorians.

Accessioning is essentially verifying that an acceptable specimen has been received, associating the specimen with a particular patient's demographics, and finally, documenting specific facts about the specimen collection:

- Confirm patient identity
- Confirm tests ordered and collection method (correct tubes or containers)
- Modifying orders if needed (add or delete tests)
- Documenting specimen type (for example: Blood, Urine, Tissue, and so on)
- Date and time of collection
- Identifying person who obtained the specimen

Once the accessioning process is completed by the RPMS LIS, an Accession Number is generated and laboratory labels are printed. The filing and processing of laboratory results are tied to this accession number.

2.0 Getting Started

Prior to accessing the Lab Accession, you must log on to the RPMS-EHR system.

Your site must have a client account number defined within the BLR MASTER CONTROL field, REF LAB CLIENT ACCOUNT NUMBER to utilize Lab Test Accession.

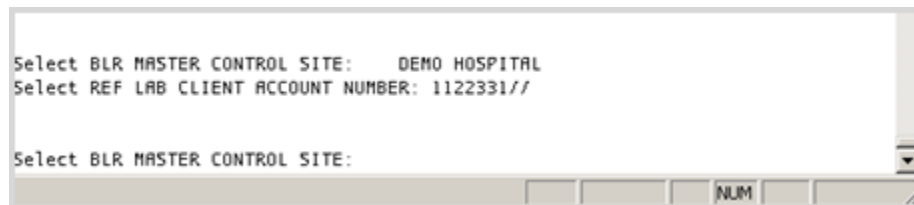


Figure 1. BLR Master Control File

2.1 Log On To the System

RPMS-EHR users shall:

- Have a unique User Identification/Account name and password.
- Have access based on authenticating the account name and password entered.
- Be locked out of an account after five (5) successive failed logon attempts within a specified time period (for example, one hour).

Once you have logged on to RPMS-EHR, the main window appears.

The screenshot displays the RPMS-EHR Main Window interface. At the top, there is a menu bar with options: User, Patient, Refresh Data, Tools, Help, eSig, Clear, Clear and Lock, Community Alerts, and Dosing Calculator. Below the menu bar, a tabbed interface is visible with tabs for PRIVACY, PATIENT CHART, RESOURCES, and LAB ACCESSION (which is currently selected). The LAB ACCESSION tab shows a 'Visit not selected' message for 'USER.DEMO'. Below this, there are several data entry sections: 'Active Problem List', 'Medication List', 'Lab Orders', 'Appointments/Visits', 'Vitals', 'Activity Time' (with fields for Encounter Time, Travel Time, and Total), 'Reminders', 'Adverse Reactions', and 'Alerts'. Each section contains a table with columns for data entry. The 'Activity Time' section is highlighted in grey.

Figure 1. RPMS-EHR Main Window

2.2 Adding the Lab Accession Component to RPMS-EHR

To use the Lab Accession component, the Clinical Application Coordinator (CAC) must first add the object to your RPMS-EHR template using Design Mode. Refer to the *Design Mode Script Guide* for additional information.

2.2.1 Security

Only users with the CIAV Design security key assigned to them by the Clinical Application Coordinator (CAC) can change the settings. Otherwise the Lab Accession tab is disabled for users without this security key.

2.2.2 Adding the Lab Accession Tab

1. Log on to RPMS-EHR.
2. In the RPMS-EHR bar at the top of the window, right-click the mouse and select Design Mode.

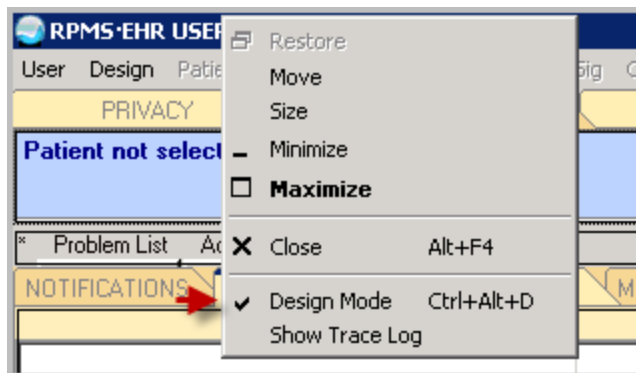


Figure 2. Design Mode Selected

When selected, you will notice that most of the menu options on the Main Menu bar are grayed out and cannot be selected.

3. Click Design in the menu bar. The Design Mode menu appears.



Figure 3. Design Mode Menu Bar

4. Select Layout Manager.

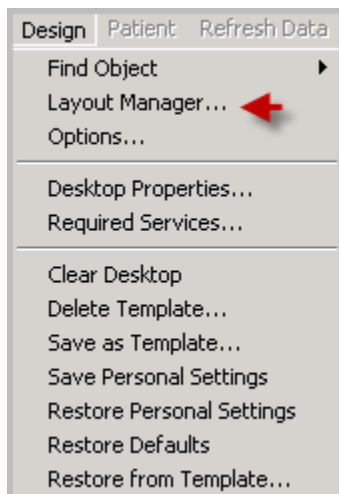


Figure 4. Design Mode Menu

The Layout Manager window appears.



Figure 5. Layout Manager Window

5. Click Tabbed Notebook to highlight it, and then click Properties. The Properties for Tabbed Notebook window opens.

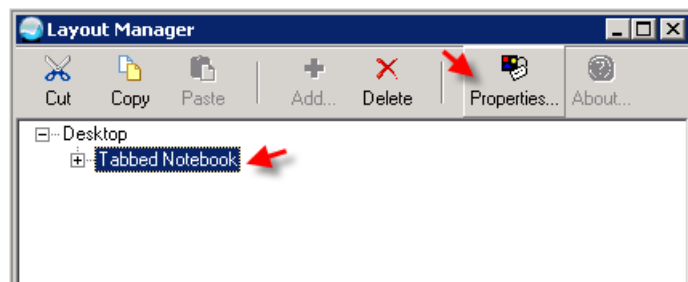


Figure 6. Select Tabbed Notebook

6. On the Properties for Tabbed Notebook window, click Tab Editor. The Tabs section refreshes with the names of the tabs.

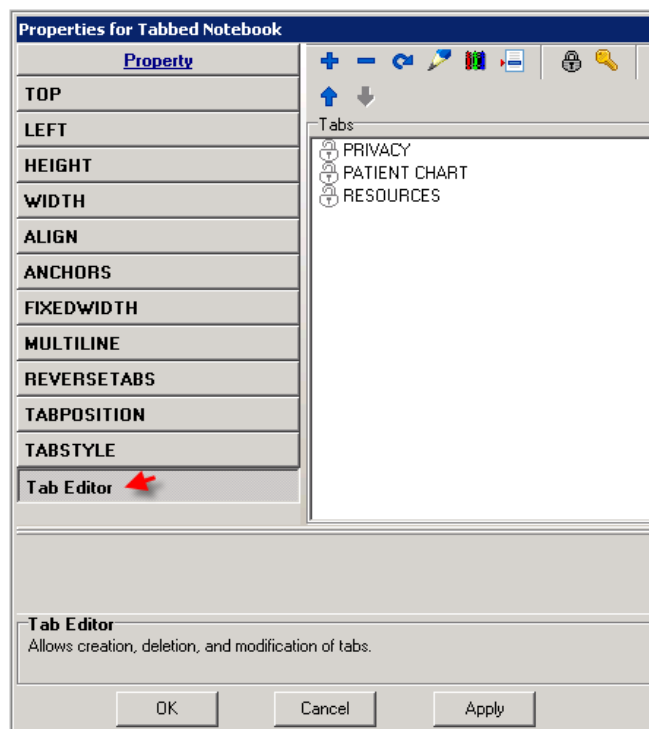


Figure 7. Properties for Tabbed Notebook Window

- Click the plus sign (+) at the top of the window. A New Tab1 appears in the list.

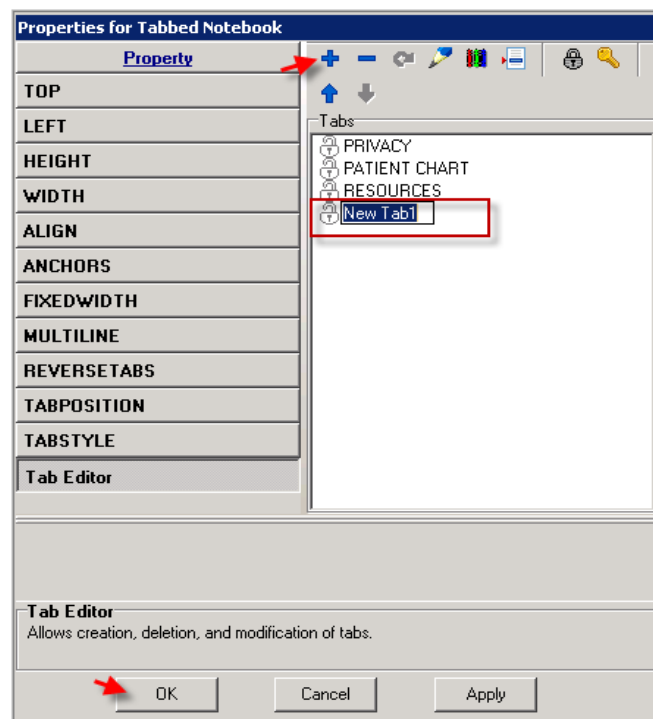


Figure 8. Add Lab Accession Tab

- Select the New Tab1 field, type Lab Accession, and then click OK. The Layout Manager window opens with the Lab Accession tab listed in the Tabbed Notebook heading.
- Select the Lab Accession Tab, and then click Add to add a new tab.

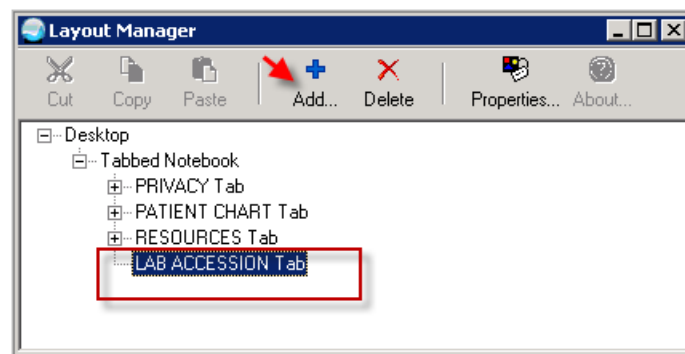


Figure 9. Click Add to Add the Lab Accession Tab

The Add an Object dialog box appears.

- Expand (click) Type > Object and scroll down the list of Objects that appear.

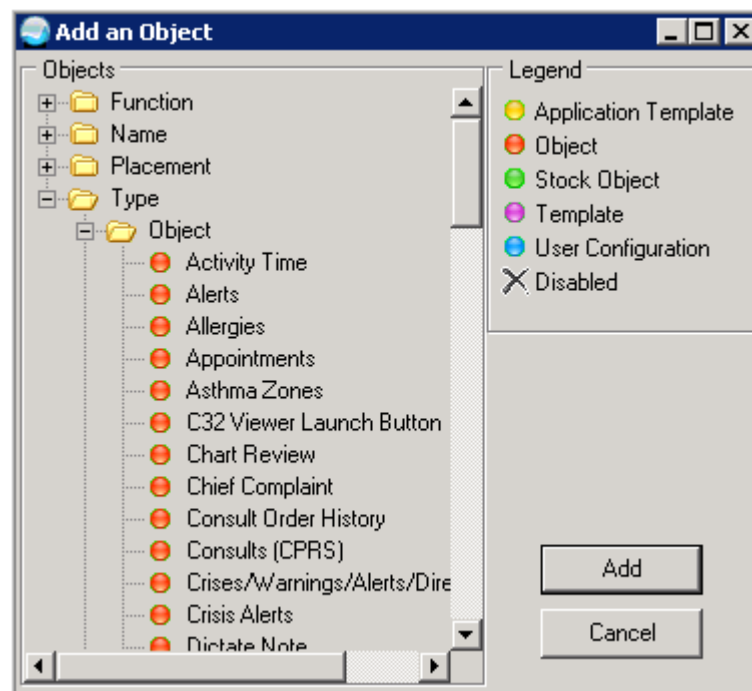


Figure 10. List of Objects

11. Select the Lab Accession object, and then click Add.

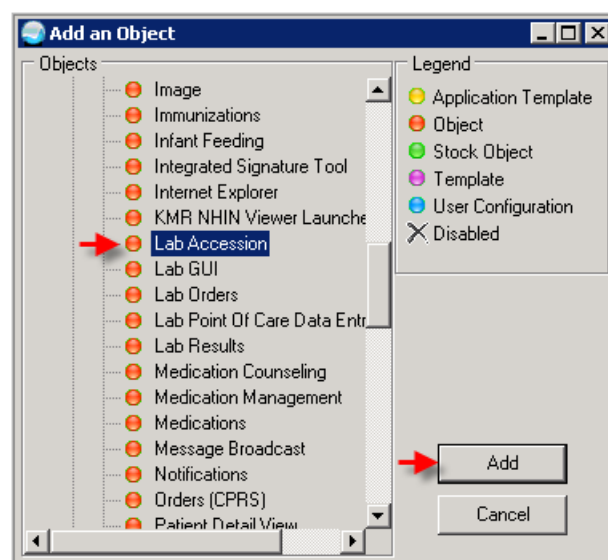


Figure 11. Adding Lab Accession Object

The Lab Accession tab is added to the list of tabs appearing on the RPMS-EHR window.

12. Click the X to close the Layout Manager window.

13. At the top of the RPMS-EHR window, click the Design menu and select Save as Template.

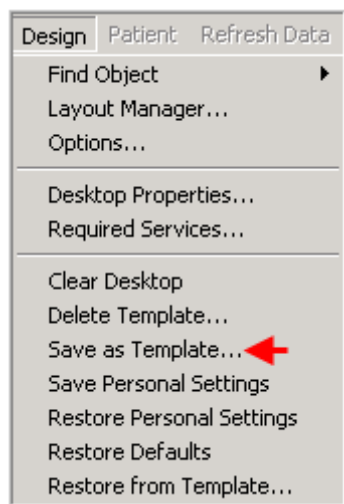


Figure 12. Save as Template Command

14. Right-click the RPMS-EHR bar again.

15. Click Design Mode to cancel and exit.

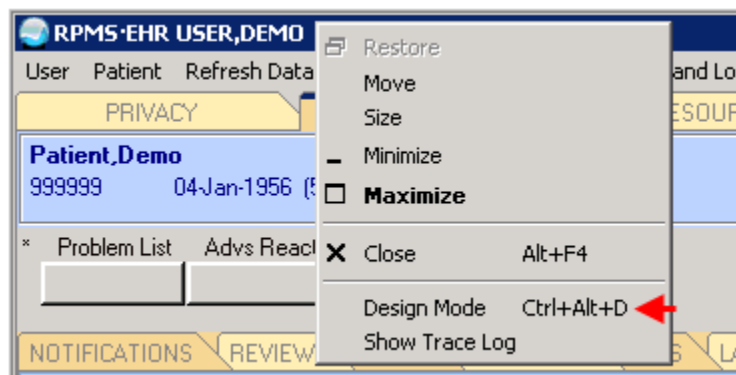


Figure 13. Exiting Design Mode

You are back to the normal RPMS-EHR mode.

2.3 Notifications

Important: To set the default number of Days to Accession, the XPAR parameter BLR DAYS TO ACCESSION must be defined at installation. Refer to [Settings](#) for additional information.

Note: The Confirmed By button is enabled only when a site sets the XPAR parameter BLR PT CONFIRM to Yes. Turning on this parameter is optional.

3.0 Orientation

The Laboratory Accession GUI workflow diagram below details how laboratory orders are processed depending on test outcomes, as well as reference laboratory configuration, LEDI vs. GIS.

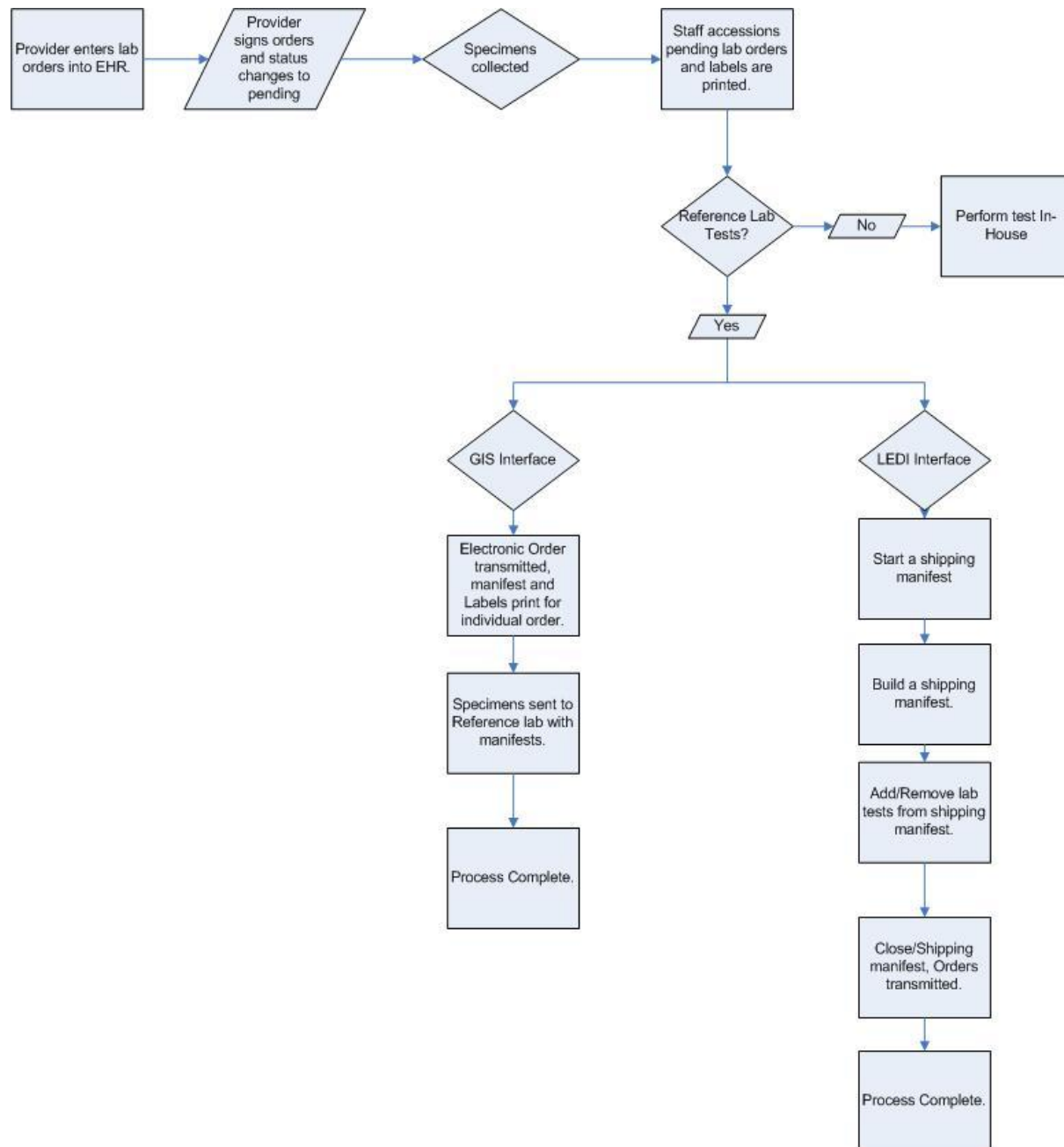


Figure 14. Laboratory Accession Process Workflow

3.1 Definitions

The table below defines terms used in this document for various areas of the user interface.

Window Area Descriptions Table

Term	Description
Ribbon Bar	Organizes the functionality of the application into a single toolbar control. Contains the Tasks and Manage tabs.
Patients Pane	Shows the Patient Workspace, patient list by Collection Type, and the lab pending order patients list by Order Date. These workspaces show the groups of patients with pending lab orders that are currently waiting to be worked on, and enable the user greater flexibility on completing the tasks required for a patient.
Tasks Pane	Displays the orders associated with the patients in the Patient Workspace. Shows detail and an order summary on all pending labs for the patient.

3.2 Basic Window Layout

The main Lab Accession window contains the Ribbon bar at the top of the screen, the Patients pane on the left-side of the screen, and the Tasks pane on the right.

The Lab Accession main window is shown below:

The screenshot displays the Lab Accession window with the following components:

- Ribbon Bar:** Includes tabs for PRIVACY, PATIENT CHART, RESOURCES, and LAB ACCESSION. The LAB ACCESSION tab is active.
- Tasks Pane (Left):**
 - Manage:** Fields for Name (SMITH, AMANDA), Gender (F), HRN (T00002), Street Address, City, and DOB (3/20/1963). A checkbox for "Adjust Days to Accession" is checked, with a value of 120.
 - Actions:** Includes "Accession" and "Selected Patient" buttons.
 - Settings:** A button for configuration.
 - Patients:** A dropdown menu for selecting a patient.
 - Patient Workspace:** A table listing patients with columns for Name, HRN, and DOB. The selected patient is SMITH, AMANDA (HRN: T00002, DOB: 3/20/1963).
 - Order Summary:** A table showing lab orders for the selected patient. The table has columns for Lab Order Number, Test Name, Collection Sample, Collect Date, and Specimen.

Lab Order Number	Test Name	Collection Sample	Collect Date	Specimen
393	POLIO VIRUS CULTURE	VIRAL MEDIA	12/12/2012	ABDUCTOR DIGITI MINIMI MUSCLE OF FOOT
393	DRUG 3 SCREEN (ANMC) MINI	URINE	1/22/2013	URINE
393	BARBITUATES CONFIRMATION	URINE	1/22/2013	URINE
393	MUMPS VIRUS AB, IgG	BLOOD	12/12/2012	SERUM

Figure 15. Basic Screen Layout

3.3 Ribbon Bar

The Ribbon Bar at the top of the main Lab Accession window enables the user to view all functions of the program in an organized series of tabs. The Ribbon Bar is designed to resemble the traditional menu bar and toolbars of Windows applications, thereby creating a similar user experience. By separating the functionality into the following tabs, the primary operations of the application are made easily accessible with a minimum of clutter to the display:

- Tasks
- Manage

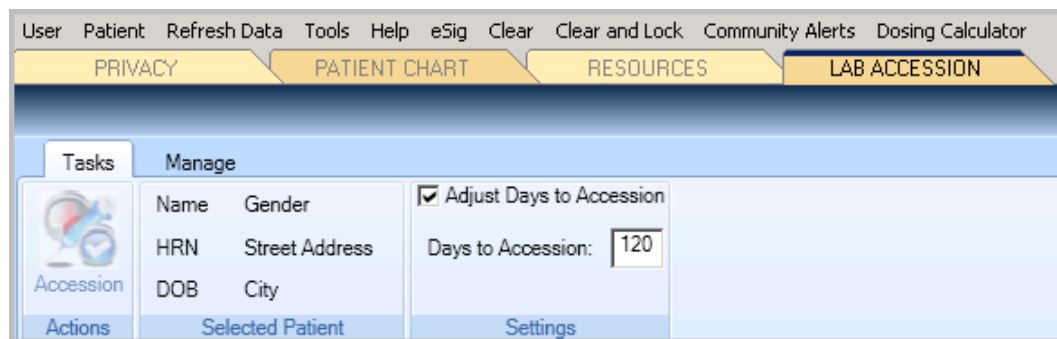


Figure 16. Lab Accession Ribbon Bar

3.3.1 Tasks Tab

The Tasks tab in the Ribbon Bar provides access to the following Actions and features:

- Accession
- Selected Patient
- Settings

Tasks | **Manage**

Name: TEST_ANGELA Gender: F ☒ Adjust Days to Accession
 HRN: 1234 Street Address: 1234 Apple Pie Alameda Days to Accession: 120
 DOB: 9/24/1971 City: Newburgh

Patient Workspace

Name	HRN	DOB
BABY_BOY	123456	11/18/2007
DEMO.TODDLER	36665	6/3/2001
NUNEZ.PAZ	293829	5/25/1933
TEST_ANGELA	1234	9/24/1971
TEST_PATIENT A	36445	10/12/1948

Order Summary [TEST_ANGELA] | Order [343, SODIUM] | Order [342, ANA]

Lab Order Number	Test Name	Collection Sample	Collect Date	Specimen
343	SODIUM	BLOOD	11/29/2012	SERUM
342	ANA	BLOOD	12/4/2012	SERUM

Patient Workspace
 Collection Type
 Ordered Date
 Accession History

Figure 17. Tasks Tab with Selected Patient Order Detail

3.3.1.1 Accession

The Accession icon is used to accession tests. Refer to the [Accessioning Orders](#) section for the steps to accession tests.

3.3.1.2 Selected Patient

The Selected Patient Detail tab in the Ribbon Bar enables the user to view the Name, HRN (health record number), DOB (date of birth), Gender, Street Address, and City details for the patient highlighted (selected) in the Patient Workspace, as shown in the example below.

RPMS-EHR PTFHYBRID USER, DEMO

User Patient Refresh Data Tools Help eSig Clear Clear and Lock Community Alerts Dosing Calculator PCP

LabAccession | **Selected Patient**

Tasks | **Manage**

Name: TEST_ALICE Gender: F ☒ Adjust Days to Accession
 HRN: 123587 Street Address: Days to Accession: 0
 DOB: 8/8/1961 City:

Patient Workspace

Name	HRN	DOB
BABY_BOY	123456	11/18/2007
DEMO.BOY	45444	4/16/1998
DEMO.FEMALE A	21334	8/10/1976
SMITH,AMANDA	T00002	3/20/1963
TEST_ALICE	123587	8/8/1961
ZAVALA,ADULT	8976	1/1/1960

Order Summary [TEST_ALICE] | Order [47, SHIGELLA TITER] | Accession [TEST_ALICE]

Confirmed By: USER.DEMO Confirmation: Collected By: USER.DEMO When Collected: 3/31/2014 3:30 PM

Orders to be Accessioned:

Order	Test Name	Collection Sample	Ordered Date	Specimen	Diagnosis	Lab Processing Instructions	Ordering Provider
<input type="checkbox"/> 47	SHIGELLA TITER	BLOOD	3/31/2014	SERUM			USER.DEMO

Insurance: ☐ Third Party ☐ Client ☐ Patient

Figure 18. Selected Patient Information

This ensures that the user is aware of which patient record is being worked on and helps avoid altering information for the wrong patient.

The Task pane to the right of the Patient Workspace displays the Lab Order Number, Test Name, Collection Sample, Collection Date, Specimen, and Ordering Provider for the selected patient.

3.3.1.3 Settings

The Settings tab in the Ribbon Bar contains the Adjust Days to Accession setting. This enables the user to change the number of Days to Accession to narrow down the list of patients displayed in the Patient Workspace and view the orders to accession.

The number selected indicates how many days in the future, and also in the past, from today's date that the laboratory collection is scheduled.

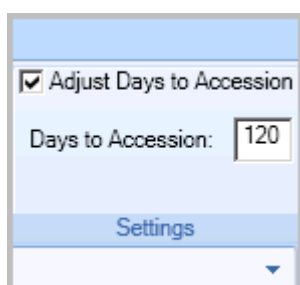


Figure 19. Adjust Days to Accession

When selecting Settings, make sure the Adjust Days to Accession option box is selected (checked). The Days to Accession number that initially displays is the number set by your Clinical Application Coordinator (CAC) at installation.

Important: To set the default number of Days to Accession, the XPAR parameter BLR DAYS TO ACCESSION must be defined at installation.

Change the number of days in the Days to Accession field, depending on how far in the future or how far back in the past that you want to view the patient's pending laboratory orders. Click Refresh Data in the Menu Bar at the top of the page. Patient's with accession orders in this range of days display in the Patient Workspace.

Note: Changing the number in the Days to Accession field is only good for the current session. Once you log off, the number reverts back to the original default set by the CAC at your site.

3.3.2 Manage Tab

The Actions available in the Manage tab enables the user to build, edit, close, print and re-print manifests, re-print accession labels, request a report view of order and test statuses, and delete tests.

The manifest icons are set up to encourage a work flow. For example, at a LEDI site, the user first builds or creates a manifest, then starts to manually add specific accessions using the Add/Remove function when a regular manifest build would add accessions that are not intended. The user would then Close/Ship and Print the manifest.

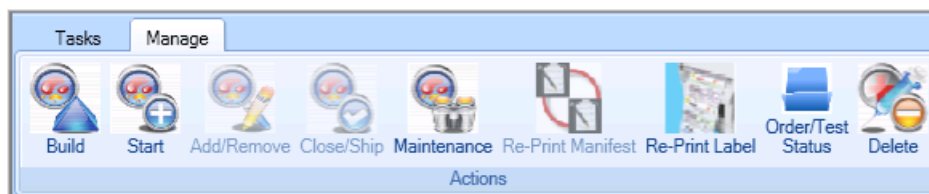


Figure 20. Manage Tab Example

Manage tab manifest functionality is available based on site configuration, as follows:

3.3.2.1 LEDI Sites

- Build
- Start
- Add/Remove
- Close/Ship
- Maintenance
- Re-Print Label
- Order/Test Status
- Delete

3.3.2.2 GIS Sites

- Re-Print Manifest
- Re-Print Label
- Order/Test Status
- Delete

Refer to the appropriate section for details:

- [LEDI Site Manifest Functionality](#)
- [GIS Site Manifest Functionality](#)

3.3.3 LEDI Site Manifest Functionality

3.3.3.1 Build Manifest

This function is used to add specimens onto a shipping manifest.

Refer to the [Building Manifests](#) section for steps to build a manifest.

3.3.3.2 Start Manifest

This option enables a manifest to be started without performing a manifest build. It can be used to start a manifest and manually add specific accessions when a regular manifest build would add accessions that are not intended. An example is when a test on a specific accession or group of accessions usually performed in house needs to be sent to an outside laboratory for analysis. Use this function in conjunction with Add/Remove a Shipping Manifest Test option.

Refer to the [Starting Manifests](#) section for steps to start a manifest.

3.3.3.3 Add/Remove Manifest

The contents of an open manifest may be edited – tests added or deleted depending on what is determined as specimens are matched up with tests on the manifest.

Refer to the [Adding or Removing Manifests](#) section for steps to add or remove tests.

3.3.3.4 Close/Ship Manifest

After specimens to be shipped have been reconciled with the Shipping Manifest, the manifest may be closed and shipped. The final copy of the manifest may be given to the courier and an additional copy may be printed for laboratory reference by using the menu option, PSM Print Shipping Manifest. Selecting Close marks a shipping manifest as closed and/or shipped.

Refer to the [Closing and Shipping Manifests](#) section for steps to close and ship manifests.

3.3.3.5 Manifest Maintenance

Manifest maintenance may be performed from this tab easily. Select from Open, Shipped, or Closed manifests and print or ship from this tab.

Refer to the [Maintenance](#) section for steps to perform manifest maintenance.

3.3.3.6 Order/Test Status

This icon provides the status for all tests given for that day and up to the grace period set by your unit. Each day is prompted in inverse order; future days can be requested. The report outputs for a specified patient, Order number, Urgency, Status, provider, and Accession number.

Refer to the [Using the Order/Test Status Function](#) section for more details.

3.3.3.7 Delete

This icon is used to delete accessioned tests not yet resulted in the lab package. This feature will display a grid format of all accessioned non-resulted lab tests and enables the user to select all tests, or specific tests for deletion. A cancellation reason will be prompted.

Refer to the [Using the Delete Function](#) section for steps to delete tests.

3.3.4 GIS Site Manifest Functionality

3.3.4.1 Re-Print Manifest

The Re-Print Manifest icon enables the user to re-print a shipping manifest list for laboratory specimens sent outside the facility to a reference lab in the event a shipping manifest fails to print or a copy must be made.

Refer to the [Re-printing Manifests](#) section for steps to re-print manifests.

3.3.4.2 Re-Print Label

The Re-Print Label icon enables the user to re-print single or multiple accession labels for that day. This feature can be used when the printer jams, for example.

Refer to the [Re-Printing Labels](#) section for steps to re-print labels.

3.3.4.3 Order/Test Status

This icon provides the status for all tests given for that day and up to the grace period set by your unit. Each day is prompted in inverse order; future days can be requested. The report outputs for a specified patient, Order number, Urgency, Status, provider, and Accession number.

Refer to the [Using the Order/Test Status Function](#) section for more details.

3.3.4.4 Delete

This icon is used to delete accessioned tests not yet resulted in the lab package. This feature will display a grid format of all accessioned non-resulted lab tests and enables the user to select all tests, or specific tests for deletion. A cancellation reason will be prompted.

Refer to the [Using the Delete Function](#) section for steps to delete tests.

3.4 Patients Pane

On the left side of the main screen is the Patients pane showing the Patient Workspace, Collection Type Workspace, Ordered Date Workspace, and Accession History Workspace. The Patient Workspace shows the list of patients that are currently being worked on and enables the user greater flexibility on completing the tasks needed for a patient.

Click the Collection Type Workspace, the Ordered Date Workspace, or the Refresh Data menu option to refresh the Patient Workspace and view those sections.

To search, begin typing the first few letters of the patient's name, HRN, or DOB in the Search field. The Patient Workspace refreshes with the patient for which you are searching at the top of the list.

Patient Workspace			
Search: <input type="text"/>			
Name	HRN	DOB	
BABY,BOY	123456	11/18/2007	
DEMO,BOY	45444	4/16/1998	
DEMO,FATHER	5465	3/5/1955	
DEMO,FEMALE A	21334	8/10/1976	
DEMO,INFANT	12	2/14/2007	
DEMO,INPATIENT F	25422	5/20/1938	
DEMO,MOTHER R	3423	9/2/1957	
DEMO,TODDLER	36665	6/3/2001	
NUNEZ,BABY	888	8/20/2008	
NUNEZ,BRANDON	6666	11/10/1990	
NUNEZ,FEMALE	999	5/5/1951	
NUNEZ,PAZ	293829	5/25/1933	
PATCH,SEVEN	345	8/13/2000	

Patient Workspace
Collection Type
Ordered Date
Accession History

Figure 21. Patient Workspace

3.4.1 Collection Type

Multiple labs by different order date are displayed in a single row, grouped by collection type.

Multiple lab collection types are grouped by the following collection type codes:

Code	Description
LC	Lab collects from patient.
SP	Send patient to lab.
WC	Ward collect by a nurse.
IC	Immediate collect by any available medical personnel.

Patients				
Collection Type				
	Name	HRN	DOB	
^ SP				
	PATIENT, DEMO	999999	1/4/1956	
	DEMO, FEMALE A	21334	8/10/1976	
	DEMO, FATHER	5465	3/5/1955	
	DEMO, BOY	45444	4/16/1998	
	DEMO, TODDLER	36665	6/3/2001	
	DEMO, INFANT	12	2/14/2007	
	NUNEZ, BRANDON	6666	11/10/1990	
	NUNEZ, FEMALE	999	5/5/1951	
	TEST, ANGELA	1234	9/24/1971	
	BABY, BOY	123456	11/18/2007	
	NUNEZ, PAZ	293829	5/25/1933	
	PATCH, SEVEN	345	8/13/2000	
^ WC				
Patient Workspace				
Collection Type				
Ordered Date				
Accession History				

Figure 22. Collection Type Groupings

3.4.2 Ordered Date

Users can sort and limit the display of the list by setting a start and end date for the Order Date.

Multiple labs with different order dates are displayed on one row, based on the earliest order date and the display can be restricted by a start and end date for Order Date.

Patients				
Ordered Date				
	Name	HRN	DOB	
^ 3/28/2012				
	BABY,BOY	123456	11/18/2007	
^ 4/24/2012				
	DEMO,FEMALE A	21334	8/10/1976	
	DEMO,FEMALE A	21334	8/10/1976	
	DEMO,FEMALE A	21334	8/10/1976	
	NUNEZ,BRANDON	6666	11/10/1990	
	NUNEZ,BABY	888	8/20/2008	
	BABY,BOY	123456	11/18/2007	
^ 5/7/2012				
	PATIENT,DEMO	999999	1/4/1956	
	DEMO,FATHER	5465	3/5/1955	
	DEMO,MOTHER R	3423	9/2/1957	
	DEMO,BOY	45444	4/16/1998	
Patient Workspace				
Collection Type				
Ordered Date				
Accession History				

Figure 23. Ordered Date Workspace

3.4.3 Accession History

The Accession History workspace provides a history of accessioned tests for the current logged-on session.

Users can sort the display of the list by clicking the Accession Number, Test UID, or Test Name header.

Figure 25. Tasks Pane with Patient Selected

3.6 Refreshing the Patient Workspace

The Patient Workspace is set to auto-refresh to update with new orders every 10 minutes, or whenever the user clicks from tab to tab.

The user can also click the Refresh Data button at the top of the RPMS EHR bar.



Figure 26. Refresh Data Button

3.7 Pane Size Adjustment

The size of the panes can be adjusted as with other Windows-type applications.

1. Roll your cursor over the edge of the window to enable the double-pointed arrow cursor.
2. Click, and while holding down your mouse button, drag the window to the desired size.

For example, the Tasks pane can be pulled down and lengthened to show all of the available fields without having to scroll down.

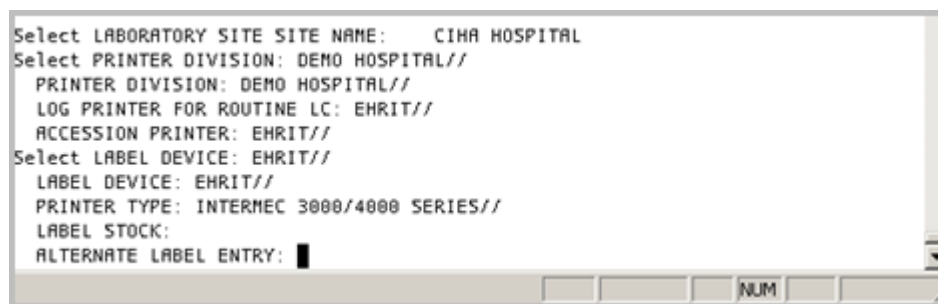
4.0 Completing Accession Tasks

4.1 Accessioning Orders

Complete the steps below to generate an accession number and print laboratory labels.

If multiple lab tests have the same collection sample, and only one test is selected for accessioning, the system will accession all tests that are associated and remove them from the list of patient tests yet to be accessioned (will also show in accession history pane). For example, if the patient has a UA and HCG test to be accessioned, and the user only selects the UA, the HCG will also be accessioned because the collection sample is the same.

Important: When printing labels during the accessioning process, the printer device must be defined from the ACCESSION PRINTER field of the PRINTER DIVISION multiple in the LABORATORY SITE file. This printer must be also defined in the LABEL DEVICE multiple, also located in the LABORATORY SITE file.



The screenshot shows a text-based dialog box with the following content:

```
Select LABORATORY SITE SITE NAME:  CIHA HOSPITAL
Select PRINTER DIVISION: DEMO HOSPITAL//
PRINTER DIVISION: DEMO HOSPITAL//
LOG PRINTER FOR ROUTINE LC: EHRIT//
ACCESSION PRINTER: EHRIT//
Select LABEL DEVICE: EHRIT//
LABEL DEVICE: EHRIT//
PRINTER TYPE: INTERMEC 3000/4000 SERIES//
LABEL STOCK:
ALTERNATE LABEL ENTRY: █
```

At the bottom right, there is a button labeled "NUM".

Figure 27. Accession Printer Defined

To accession orders:

1. In the Patient Workspace, click to select the patient's name. The patient's orders appear in the Order Summary tab of the Tasks pane.

Note: If any of the patient's sendout tests have an Ask at Order Question (AOE) defined in the BLR Reference Lab file, you will see [AOE] next to the Test Name. See step 4 for details.

Lab Order Number	Test Name	Collection Sample	Collect Date	Specimen
449	LIPID PROFILE DEMO	BLOOD	5/29/2013	SERUM
449	xPAP LB,RFX HPV ASCU [AOE]	THIN PREP	5/29/2013	ENDOCERVIX
451	xLEAD(PED)) [AOE]	BLOOD	5/30/2013	BLOOD
450	POTASSIUM	BLOOD	6/10/2013	SERUM

Figure 28. Order Summary Before Accessioning

2. From the Ribbon Bar in the Tasks tab, click the Accession button.

Tasks Manage

Accession

Name: SMITH, JENNIFER Gender: F ☒ Adjust Days to Accession

HRN: T00002 Street Address: Days to Accession: 120

DOB: 3/20/1963 City:

Actions Selected Patient Settings

Figure 29. Accession Button

The Accession [patient name] tab opens in the Tasks pane.

Tasks

Confirmed By: USER, DEMO Confirmation: Collected By: USER, DEMO When Collected: 2/12/2013 4:17 PM

Orders to be Accessioned: Insurance: ☒ Third Party ☐ Client ☐ Patient

Order	Test Name	Collection Sample	Collect Date	Specimen	Diagnosis	Lab Process
<input type="checkbox"/> 393	POLIO VIRUS CULTURE	VIRAL MEDIA	12/12/2012	ABDUCTOR DIGITI MINIMI MUSCLE OF FOOT		
<input type="checkbox"/> 393	DRUG 3 SCREEN, (ANMC) MINI	URINE	1/22/2013	URINE		
<input type="checkbox"/> 393	BARBITUATES CONFIRMATION	URINE	1/22/2013	URINE		
<input type="checkbox"/> 393	MUMPS VIRUS AB, IgG	BLOOD	12/12/2012	SERUM		

Client Accounts:

Account Number
<input type="radio"/> 91901619
<input type="radio"/> ABC

OK Cancel

Figure 30. Accession Pane Before Accessioning

3. In the Accession pane:
 - a. The Confirmed By button defaults to the logged-on user. If you want to select a different user:

Note: The Confirmed By button is enabled only when a site sets the XPAR parameter BLR PT CONFIRM to Yes. Turning on this parameter is optional.

- i. Click the Confirmed By button. The Select a User window opens.

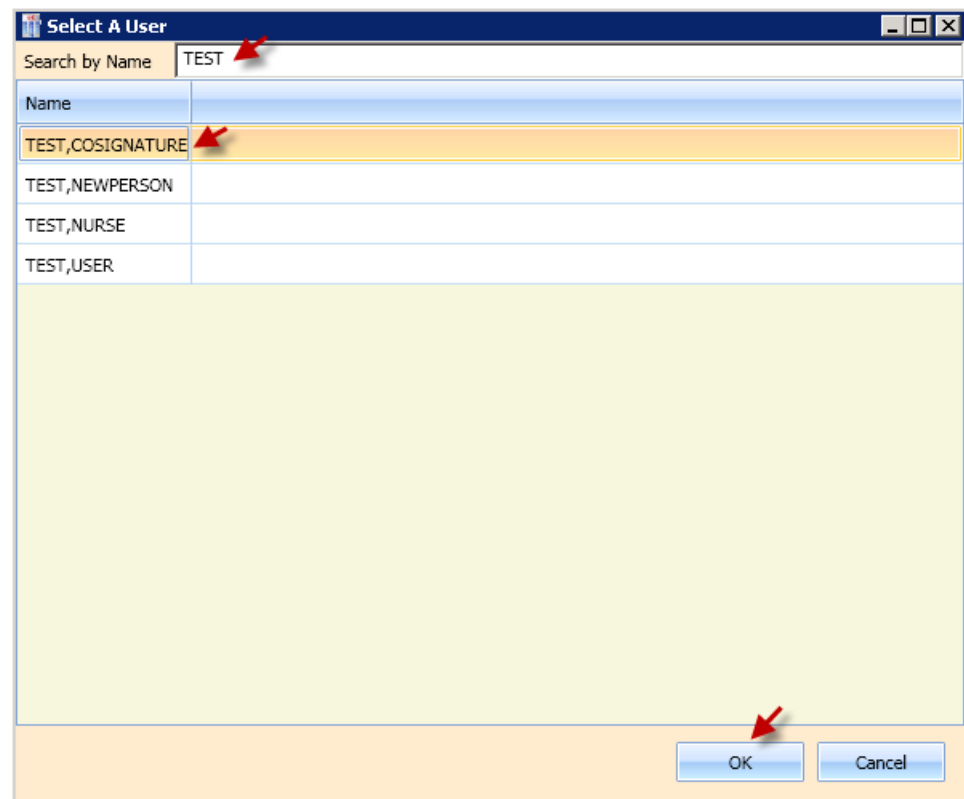


Figure 31. Selecting a Different User

- ii. In Search by Name, begin typing the first few letters of the patient's name. The list refreshes with the names matching showing at the top.
 - iii. Click to select the name, and then click OK. The Confirmed By button shows the user's name which you selected.
- b. In the Confirmation field, type in the information from the patient for identification, usually the patient's HRN, name, or date-of-birth (DOB).
 - c. The Collected By button defaults to the logged in user. If you want to select a different user:
 - i. Click the Collected By button. The Select a User window opens.

- ii. In Search by Name, begin typing the first few letters of the patient's name. The list refreshes with the name(s) matching the letters you typed showing at the top.
- iii. Click to select the name, and then click OK. The Collected by button shows the user's name which you selected.

Note: The Confirmed By and Collected By can be different users, as applicable.

- d. The When Collected field defaults to the current date and time. If you need to select a different date and/or time:
 - i. Type the new date and/or time, or click the calendar icon (📅). The Calendar and Clock window opens.

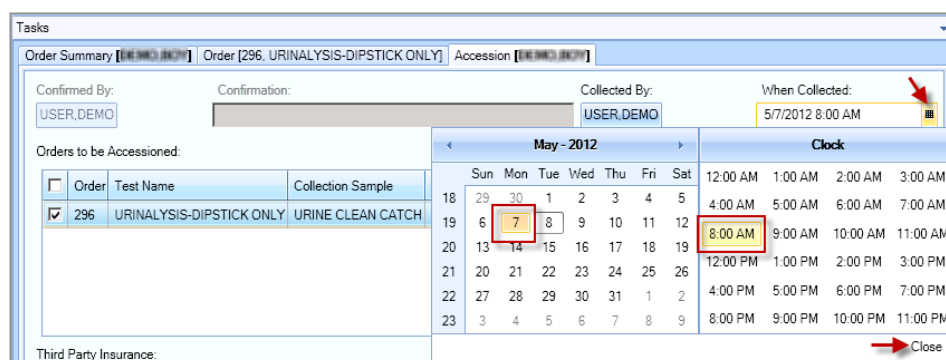


Figure 32. Select New Date and/or Time

- ii. Click to select the applicable date and/or time, and then click Close. The When Collected: field updates with your changes.

Note: You cannot utilize N for Now or T for Time.

- e. In the Orders to be Accessioned section, click the box next to Order to select all, or click the boxes next to the order(s) you want to accession.
- f. Insurance Selection: The insurance choice defaults to the setting in the BLR Master Control file, Ref lab Billing Type field.
- g. The insurance setting can be changed from the default if the patient has Third Party insurance.

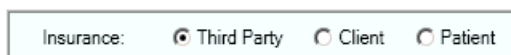


Figure 33. Insurance Option Buttons

- If the patient has insurance, the Accession tab lists all insurance entries for the patient in the Third Party Insurance section.

Tasks

Order [393. DRUG 3 SCREEN.(ANMC) MINI] | Order [393. BARBITUATES CONFIRMATION] | Order [393. MUMPS VIRUS AB, IgG] | Accession [393. DRUG 3 SCREEN.(ANMC) MINI]

Confirmed By: USER.DEMO Confirmation: Collected By: TEST.NURSE When Collected: 2/14/2013 11:00 AM

Orders to be Accessioned: Insurance: ☒ Third Party ☐ Client ☐ Patient

Order	Test Name	Collection Sample	Collect Date	Specimen	Diagnosis	Lab Process
<input type="checkbox"/> 393	POLIO VIRUS CULTURE	VIRAL MEDIA	12/12/2012	ABDUCTOR DIGITI MINIMI MUSCLE OF FOOT		
<input type="checkbox"/> 393	DRUG 3 SCREEN.(ANMC) MINI	URINE	1/22/2013	URINE		
<input type="checkbox"/> 393	BARBITUATES CONFIRMATION	URINE	1/22/2013	URINE		
<input type="checkbox"/> 393	MUMPS VIRUS AB, IgG	BLOOD	12/12/2012	SERUM		

Client Accounts:

Account Number
<input checked="" type="radio"/> 91901619
<input type="radio"/> ABC

OK Cancel

Figure 34. Accessioning Patient with Third Party Insurance (Adding Diagnosis)

- If the patient has Third Party Insurance, click the Diagnosis button in the line item(s) you are accessioning. The Select Diagnoses window opens.

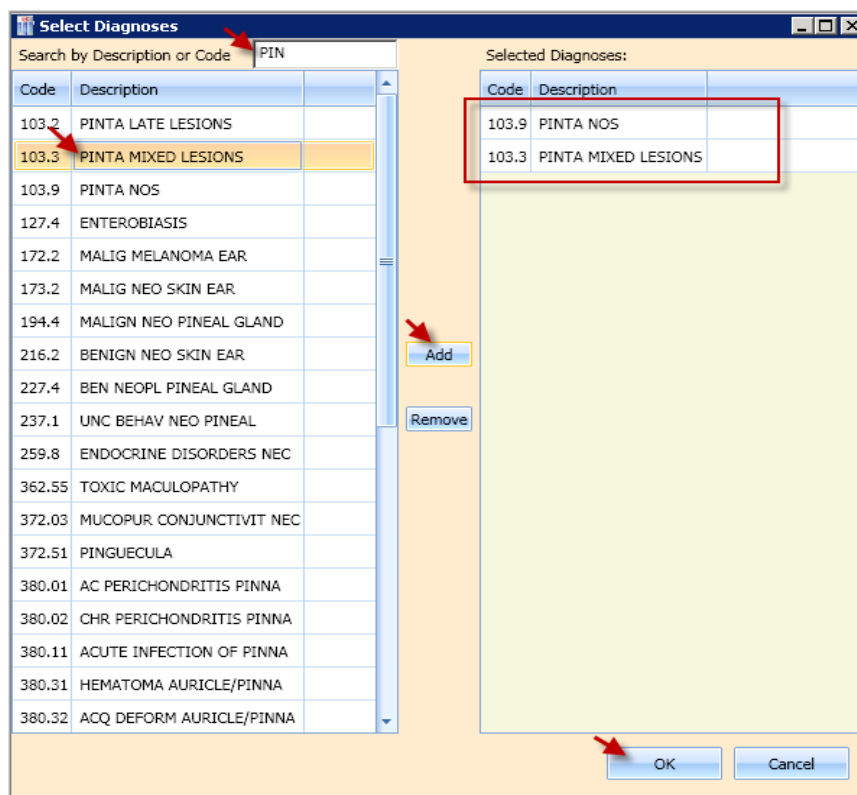


Figure 35. Select Diagnoses

- ii. In the Search by Description or Code field, begin typing the first few letters of the diagnosis, or the ICD code. The list refreshes with the applicable diagnoses.

Note: If the Lab Accessioned Date is on or after the implementation date, ICD-10 codes are displayed. If the Lab Accessioned date is before the implementation date, ICD-9 codes are displayed.

Note: You can sort the list of diagnoses by clicking the Code or Description header.

- iii. Click to select the applicable diagnosis, and then click the Add button. The diagnosis shows in the Selected Diagnoses column. Do this as many times as needed to apply the necessary diagnoses.
- iv. Click Ok. The diagnosis code appears in the Diagnosis column in the line item(s) to be accessioned.

Note: Multiple Diagnoses entries are allowed and permeate to all orders selected for accession.

- v. In Third Party Insurance, click the checkbox to select the Insurance Name for the company to be billed.
- vi. In Client Accounts, click the Account Number option button next to the Account Number to be billed.
- If the BLR Master Control file is set to Client, the Client option button is auto-selected.
 - The Diagnosis field(s) are disabled.

Tasks

Order [393, DRUG 3 SCREEN (ANMC) MINI] | Order [393, BARBITUATES CONFIRMATION] | Order [393, MUMPS VIRUS AB, IgG] | Accession [393, DRUG 3 SCREEN (ANMC) MINI]

Confirmed By: USER.DEMO | Confirmation: | Collected By: TEST.NURSE | When Collected: 2/14/2013 11:00 AM

Orders to be Accessioned: Insurance: ☐ Third Party ☒ Client ☐ Patient

Order	Test Name	Collection Sample	Collect Date	Specimen	Diagnosis	Lab Process
<input type="checkbox"/> 393	POLIO VIRUS CULTURE	VIRAL MEDIA	12/12/2012	ABDUCTOR DIGITI MINIMI MUSCLE OF FOOT		
<input type="checkbox"/> 393	DRUG 3 SCREEN (ANMC) MINI	URINE	1/22/2013	URINE		
<input type="checkbox"/> 393	BARBITUATES CONFIRMATION	URINE	1/22/2013	URINE		
<input type="checkbox"/> 393	MUMPS VIRUS AB, IgG	BLOOD	12/12/2012	SERUM		

Client Accounts:

Account Number	
<input checked="" type="radio"/> 91901619	
<input type="radio"/> ABC	

OK Cancel

Figure 36. Client Insurance Button Accession Screen Example

- The system displays all Client Accounts defined in the BLR Master Control file; select one or multiple account numbers, as needed.
 - If the BLR Master Control field REF LAB CLIENT ACCOUNT NUMBER has more than one entry, the Accession pane displays the Client Accounts pane.
 - If the BLR Master Control field REF LAB CLIENT ACCOUNT NUMBER has one entry, the Accession pane DOES NOT display client account number pane.
- If the patient has no insurance, the Patient button is auto-selected.
 - The Diagnosis field(s) are disabled.

Tasks

Order [393, DRUG 3 SCREEN.(ANMC) MINI] | Order [393, BARBITUATES CONFIRMATION] | Order [393, MUMPS VIRUS AB, IgG] | Accession [393, DRUG 3 SCREEN.(ANMC) MINI]

Confirmed By: USER, DEMO Confirmation: Collected By: TEST, NURSE When Collected: 2/14/2013 11:00 AM

Orders to be Accessioned: Insurance: ☒ Third Party ☐ Client ☒ Patient

Order	Test Name	Collection Sample	Collect Date	Specimen	Diagnosis	Lab Processing Instructions
<input type="checkbox"/> 393	POLIO VIRUS CULTURE	VIRAL MEDIA	12/12/2012	ABDUCTOR DIGITI MINIMI MUSC		
<input type="checkbox"/> 393	DRUG 3 SCREEN.(ANMC) MINI	URINE	1/22/2013	URINE		
<input type="checkbox"/> 393	BARBITUATES CONFIRMATION	URINE	1/22/2013	URINE		
<input type="checkbox"/> 393	MUMPS VIRUS AB, IgG	BLOOD	12/12/2012	SERUM		

Client Accounts:

Account Number	
<input type="radio"/> 91901619	
<input type="radio"/> ABC	

OK Cancel

Figure 37. Patient Insurance Button Accession Screen Example

- The system displays all Client Accounts defined in the BLR Master Control file; select one or multiple account numbers, as needed.
 - If the BLR Master Control field REF LAB CLIENT ACCOUNT NUMBER has more than one entry, the Accession pane displays the Client Accounts pane.
 - If the BLR Master Control field REF LAB CLIENT ACCOUNT NUMBER has one entry, the Accession pane DOES NOT display client account number pane.
 - If you need to change the auto-selected option, click the applicable option button to indicate which party is responsible for billing.
4. Click OK on the Accession pane. If any of the patient's sendout tests have an Ask at Order Question (AOE) defined in the BLR Reference Lab file, you will see [AOE] next to the Test Name, and the Accession [Patient Name] AOE dialog box opens.

Tasks

Order Summary [ZAVALA, TINA] | Order [386, xPAP LB, RFX HPV ASCU [AOE] | Order [386, xLEAD(PEDI) [AOE] | Accession [ZAVALA, TINA]

Question 1 of 34: xPAP LB, RFX HPV ASCU

Question:

Specimen collected with broom alone? (Y/N)

Answer:

Bypass Next

Accession [Patient Name] AOE Dialog Box Example

5. In the Accession [Patient Name] AOE dialog box:
 - a. In Question 1 of X, in the Answer field, type an answer to the question or leave the field blank, and then click Next. You are taken to the next question (if applicable).

Note: The Question field in the AOE Questions dialog box is read-only. The Answer field is free-text and has an 80 character limit. No validation or range checking of the Answer field occurs by the system.

- If there are no additional questions associated with the order, you are taken to the Accession screen with a table showing your questions and answers.

Label	Question	Answer	
Question 1 of 5: xLEAD(PED)	Race? (1=White, 2=Black, 3=Indian, 4=Asian, 5=Other)	1	
Question 2 of 5: xLEAD(PED)	Hispanic (1=Yes, 2=No, 9=Unknown)	2	
Question 3 of 5: xLEAD(PED)	Type? (U=Urine, V=Venous, F=Fingerstick)	U	
Question 4 of 5: xLEAD(PED)	Purpose? (I=Initial, R=Repeat, F=Follow-up)	I	
Question 5 of 5: xLEAD(PED)	County Code? (2 Digit County Code)	10	

Figure 38. Accession Question and Answer Screen

- If you leave the Answer field blank and click Bypass, all other (if any) questions are voided and you are taken to the Accession screen which shows the bypassed questions with blanks in the Answer column.

Note: You may change your answers on questions that were bypassed or questions that were previously answered by clicking within the line item in the Answer column and typing the new answer.

- On the final question, type an answer or leave it blank, and then click OK. The Accession screen opens. If you click the Bypass button on the last question, the question becomes voided and you are returned to the Accession screen.

Tasks

Order Summary [DRUGS, PATH] | Order [372, xPAP LB, RFX HPV ASCU [AOE] | Order [372, AMINO ACIDS, QUAL.] | Accession [DRUGS, PATH]

Question 34 of 34: xLEAD(PED)

Question:

Specimen collected with spatula alone? (Y/N)

Answer:

OK Bypass

AOE Final Question Example

6. On the Accession question and answer screen, review your answers in the Answer column, and then click OK.

The patient's name is removed from the Patient Workspace. Lab labels and manifest will print.

4.2 Using the Patient Workspace (Searching for Patients)

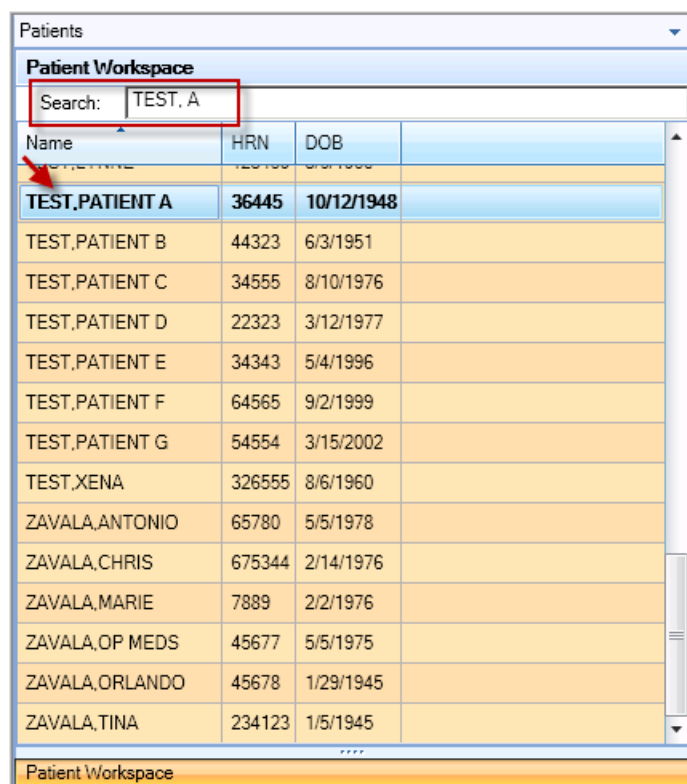
Regardless of how many collection types or pending orders, the system displays only one row per patient in the Patient Workspace.

Click to select the patient in the Patient Workspace to view all pending Orders and an Order Summary.

You can search for patients from the main list by Name, HRN, or DOB.

To search from the main list:

1. In the Search field at the top of the Patient Workspace, begin typing the first few letters of the patient's name. The list refreshes with the name(s) matching the letters you typed showing at the top.



Patients

Patient Workspace

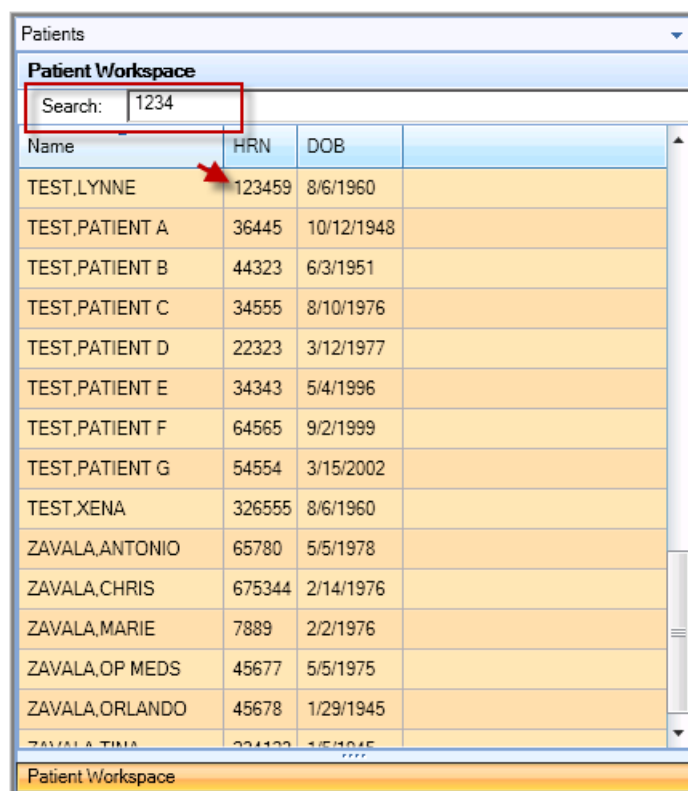
Search: TEST, A

Name	HRN	DOB
TEST,PATIENT A	36445	10/12/1948
TEST,PATIENT B	44323	6/3/1951
TEST,PATIENT C	34555	8/10/1976
TEST,PATIENT D	22323	3/12/1977
TEST,PATIENT E	34343	5/4/1996
TEST,PATIENT F	64565	9/2/1999
TEST,PATIENT G	54554	3/15/2002
TEST,XENA	326555	8/6/1960
ZAVALA,ANTONIO	65780	5/5/1978
ZAVALA,CHRIS	675344	2/14/1976
ZAVALA,MARIE	7889	2/2/1976
ZAVALA,OP MEDS	45677	5/5/1975
ZAVALA,ORLANDO	45678	1/29/1945
ZAVALA,TINA	234123	1/5/1945

Patient Workspace

Figure 39. Search by Patient Name in Patient Workspace

2. To search by HRN or DOB, begin typing the first few digits of the patient's HRN or DOB. The list refreshes with the name(s) of the patients matching the HRN or DOB at the top.



Name	HRN	DOB
TEST,LYNNE	123459	8/6/1960
TEST,PATIENT A	36445	10/12/1948
TEST,PATIENT B	44323	6/3/1951
TEST,PATIENT C	34555	8/10/1976
TEST,PATIENT D	22323	3/12/1977
TEST,PATIENT E	34343	5/4/1996
TEST,PATIENT F	64565	9/2/1999
TEST,PATIENT G	54554	3/15/2002
TEST,XENA	326555	8/6/1960
ZAVALA,ANTONIO	65780	5/5/1978
ZAVALA,CHRIS	675344	2/14/1976
ZAVALA,MARIE	7889	2/2/1976
ZAVALA,OP MEDS	45677	5/5/1975
ZAVALA,ORLANDO	45678	1/29/1945
ZAVALA,TINA	334123	1/5/1945

Figure 40. Search by HRN in Patient Workspace

4.3 Using the Ordered Date Workspace Functions

In the Ordered Date workspace, pending lab order requests are grouped by the date they were ordered by default when the Ordered Date workspace is opened.

To sort and view pending lab order requests by patient Name, HRN, or DOB, refer to the steps in the [Using the Collection Type Workspace Functions](#) section.

5.0 Manifest Functions (Using the Manage Tab)

The following sections provide Manage tab manifest functionality based on site configuration (LEDI and GIS).

5.1 LEDI Manifest Functions

The following manifest functionality (from the Manage tab) is only available at LEDI configured sites.

5.1.1 Building Manifests

Use this function to add specimens onto a shipping manifest. Refer to [Build Manifest](#) in the Orientation section for details.

Note: If you create a manifest using the Build manifest function, the [Start Manifest](#) function will be disabled.

To build a manifest:

1. In the Ribbon Bar, click the Manage tab. The Actions section opens.
2. Click the Build icon.



Figure 41. Build Manifest Icon

- If a manifest is already open, click to select it.
- If no manifest is open yet, you will be prompted to open one. Click Yes.

The Build Manifest tab opens in the Tasks pane.

Tasks

Build Manifest [SONORA]

Shipping Configuration:
SONORA

☒ Don't Print ☐ Print To Printer ☐ Print To Screen

Accession Date:
3/30/2012

☒ Exclude previously removed tests

OK Cancel Next

Figure 42. Build Manifest Window

3. In the Shipping Configuration section, select the applicable option button:
 - Don't Print (default)
 - Print to Printer
 - Print to Screen
4. In Accession Date, the date defaults to the current date. If needed, type a different date of accession, or click the calendar icon (📅) to select a date.

Note: If you opt to select a specific accession date (not the default date), you will be prompted to provide a specific accession date and starting and ending accession numbers for each accession area.

5. Click to select the Exclude previously removed tests (those that were previously added to a manifest and then removed using the Add/Remove function) checkbox if you need to exclude previously removed tests.

Note: You can add the excluded tests to the next manifest by not checking the Exclude previously removed tests checkbox.

6. Click one of the following on the Build Manifest tab, as applicable:
 - Click OK to build a manifest with all tests. The Build Manifest tab closes.
 - Click Next to select individual tests to add or remove from the manifest. The Add/Remove Tests tab opens.
 - Click to select the tests to be added or removed from the manifest, and then click OK.
7. If you selected the Print to Printer, or Print to Screen options, an example of the manifest will open and you will be prompted to print. Click Yes.

5.1.2 Starting Manifests

Use this function to start a manifest at the beginning of the day and keep it open all day until it is reviewed, closed, and shipped when the courier picks up specimens.

Refer to [Start Manifest](#) in the Orientation section for details.

Note: If you have created a manifest using the Build manifest function, the Start manifest function is disabled.

To start a manifest:

1. In the Ribbon Bar, click the Manage tab. The Actions section opens.
2. Click the Start icon.



Figure 43. Start Manifest Icon

3. A Start new Manifest pop-up asks if you want to start a new manifest. Click Yes.

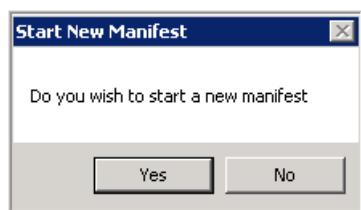


Figure 44. Start New Manifest Confirmation Pop-Up

A shipping manifest is opened and a Manifest Invoice number appears in the Manifest Workspace.

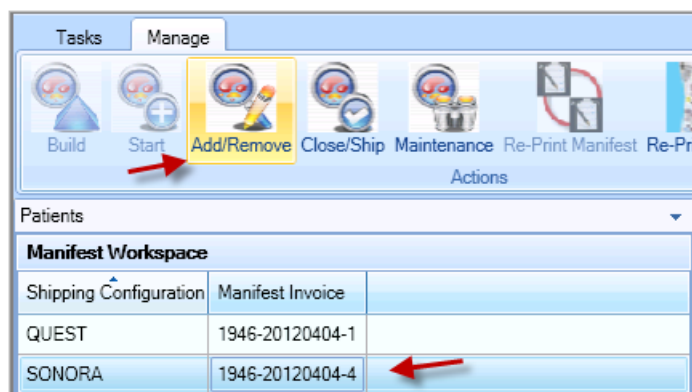


Figure 45. Start Invoice and Add Tests

4. In the Manifest Workspace, click to select the invoice, and then click the Add/Remove button to add (or remove) tests from the invoice following the steps in the next section, below.

5.1.3 Adding or Removing Accessions To or From Manifests

Use this function to add or remove tests from an open shipping manifest.

Refer to [Add/Remove Manifest](#) in the Orientation section for details.

Note: Only tests that are built in the shipping configuration file can be added to a manifest. Therefore, only accessions with those tests are displayed and can be selected.

Important: Each test that will be sent to the interfaced reference laboratory must have an entry under the profile SENDOUTS.

To add or remove manifests:

1. In the Ribbon Bar, click the Manage tab. The Actions section opens.
2. In the Manifest Workspace, click to select a manifest.

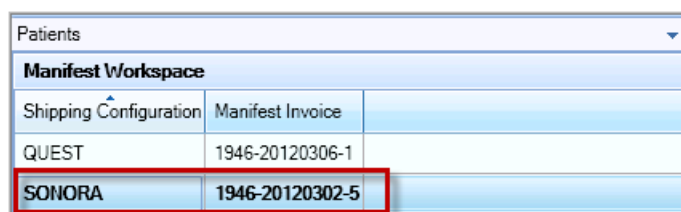


Figure 46. Select a Manifest to Add/Remove Accessions

3. Click the Add/Remove icon. The Add/Remove Tests tab opens in the Tasks pane.



Figure 47. Add/Remove Manifest Icon

- Click the checkbox next to Test UID to select all tests.
- Click the individual test to select it.
- Click the checkbox next to the patient's name to select all of that patient's tests.

Figure 48. Click to Select Tests to Add (or Remove) to/from Manifest

4. Click OK.
5. If removing tests, you will see a Remove Selected Test(s) confirmation. Click OK to remove the tests.

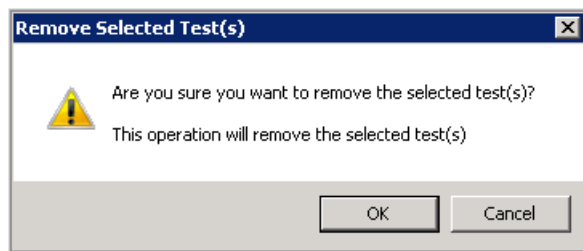


Figure 49. Remove Selected Test(s) Confirmation

5.1.4 Closing and Shipping Manifests

Use this function to close and ship manifests after reconciling.

Refer to [Close/Ship Manifest](#) in the Orientation section for details.

To close and ship manifests:

1. In the Ribbon Bar, click the Manage tab. The Actions section opens.
2. In the Manifest Workspace, click to select a Manifest Invoice to close and ship.
3. Click the Close/Ship icon.



Figure 50. Close/Ship Manifests Icon

The Close/Ship Manifest [manifest name] tab opens with the shipping manifest and list of tests.

Tasks

Close/Ship Manifest [SONORA]

Shipping Configuration: SONORA Shipping Manifest Number: 1946-20120404-4

Shipping Manifest: 1946-20120404-4
 *** DO NOT USE FOR SHIPPING DOCUMENT - WORK COPY ONLY ***
 to Site: DEMO HOSPITAL Printed: Apr 04, 2012@17:24
 from Site: DEMO HOSPITAL
 Status: OPEN
 Shipping Condition: REFRIGERATED Container: Ship via: COURIER

Patient Name	Patient ID	Lab Reference #	Requested By
Date of Birth	Sex	Specimen UID	Collect Date/Time
Item: 1 DEMO, MOTHER R	3423	275	USER, DEMO
SEP 2, 1957	Female	6020940107	Apr 03, 2012@13:33
Requestor's Phone: 909867-5555			
SODIUM SERUM			
DEMO HOSPITAL Order Code [Name]: 112 [SODIUM]			
Item: 2 DEMO, MOTHER R	3423	276	USER, DEMO
SEP 2, 1957	Female	6020940108	Apr 03, 2012@22:00
Requestor's Phone: 909867-5555			
SODIUM SERUM			

Print ☒ Print Final Manifest Close Ship Cancel Back

Figure 51. Close/Ship Manifest Tab

4. Click the following, as applicable:
 - Click Print to print the manifest (without closing or shipping).

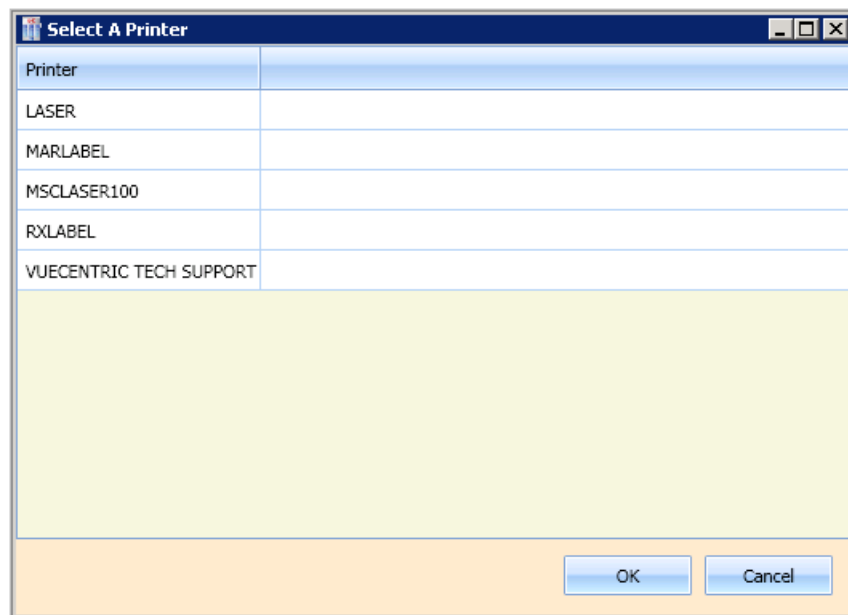


Figure 52. Select a Printer for Manifest Print

- a. Click to select a printer.
 - b. Click OK. The manifest prints at your selected printer.
- Click the Print Final Manifest check-box to print the manifest at Close/Ship. You will be prompted to select a printer.
 - Click Close to close the final manifest. The Close/Ship Manifest tab closes and the Manifest is closed in the Manifest Workspace.
 - Click Ship to ship the final manifest.
 - Click Cancel to cancel the Close/Ship.
 - Click Back to return to the Add/Remove Tests tab. Add or remove tests as needed, and then:
 - Click Next to return to the Close/Ship Manifest tab.
 - Click Ok to save the added or removed tests on the manifest.

5.1.5 Maintenance

Refer to [Manifest Maintenance](#) in the Orientation section for details.

For maintenance of manifests:

1. In the Ribbon Bar, click the Manage tab. The Actions section opens.
2. Click the Maintenance icon.



Figure 53. Maintenance Icon

The Manifest Maintenance tab opens in the Tasks pane, containing a list of the following manifest statuses and the applicable manifests:

- Open
- Shipped
- Closed

	Invoice	Status Date
OPEN		
<input type="radio"/>	1946-20120404-9	4/4/12@17:41:32
SHIPPED		
<input type="radio"/>	1946-20120326-5	3/26/12@16:14:40
<input type="radio"/>	1946-20120330-26	4/2/12@08:45:24
<input type="radio"/>	1946-20120402-29	4/2/12@15:53:43
<input type="radio"/>	1946-20120402-32	4/2/12@16:26:44
<input type="radio"/>	1946-20120404-2	4/4/12@12:37:17
<input type="radio"/>	1946-20120404-5	4/4/12@17:36:36
<input type="radio"/>	1946-20120404-6	4/4/12@17:38:17
<input type="radio"/>	1946-20120404-7	4/4/12@17:39:26
<input type="radio"/>	1946-20120404-8	4/4/12@17:41:20
CLOSED		
<input checked="" type="radio"/>	1946-20120302-5	3/14/12@16:52:43
<input type="radio"/>	1946-20120314-2	3/14/12@17:28:36
<input type="radio"/>	1946-20120314-4	3/14/12@17:42:34
<input type="radio"/>	1946-20120314-6	3/14/12@17:43:23

Print Ship Cancel

Figure 54. Manifest Maintenance Tab

3. Click the option button next to each invoice, as applicable, and then click the applicable button at the bottom of the Manifest Maintenance tab:
 - If you select an Open invoice, you can click the Print button.
 - If you select a Shipped invoice, you can click the Print button.

- If you select a Closed invoice, you can click the Print or Ship button.
4. Click Cancel to cancel the manifest maintenance.

5.1.6 Using the Order/Test Status Function

Refer to [Order/Test Status](#) in the Orientation section for details.

To request a report view of the order or test statuses for a patient:

1. In the Ribbon Bar, click the Manage tab. The Actions section opens.
2. Click the Order/Test Status icon. The Select a Patient window opens.



Figure 55. Order/Test Status Icon

3. In the Search by Name, DOB, SSN, or HRN field, begin typing the desired criteria. The window refreshes with a list of patients matching your criteria.

Search by Name, DOB or HRN: DEMO

Drag a column header and drop it here to group by that column

Name	HRN	DOB	Status
DEMO,BOY	45444	APR 16,1998	INACTIVE INPATIENT
DEMO,FATHER	5465	MAR 5,1955	INACTIVE INPATIENT
DEMO,FATHER	T00003	JAN 27,1957	INACTIVE INPATIENT
DEMO,FEMALE A	21334	AUG 10,1976	INACTIVE INPATIENT
DEMO,INFANT	12	FEB 14,2007	INACTIVE INPATIENT
DEMO,INPATIENT F	25422	MAY 20,1938	ACTIVE INPATIENT
DEMO,MOTHER R	3423	SEP 2,1957	ACTIVE INPATIENT
DEMO,TEEN	32434	OCT 12,1991	INACTIVE INPATIENT
DEMO,TODDLER	36665	JUN 3,2001	INACTIVE INPATIENT

OK Cancel

Figure 56. Search by Name, DOB, SSN or HRN

4. Click to select the desired patient, and then click OK. The Tasks pane refreshes with a new Order/Test Status [patient name] tab, containing the following columns:
 - Test (order number and name of test)
 - Urgency (status, such as STAT)
 - Status (date and time or Collected)
 - Accession number (shows Accession # is accessioned)
 - Sign or Symptom
 - Provider

Tasks

Order Test/Status [DEMO,INPATIENT F]

Start Date 2/22/2012 Refresh

Test	Urgency	Status	Accession	Sign Or Symptom	Provider
------	---------	--------	-----------	-----------------	----------

227

URINALYSIS-DIPSTICK ONLY	STAT	Collected	UA 0104 1	Adjustment Disorder With Anxiety	USER.DEMO
--------------------------	------	-----------	-----------	----------------------------------	-----------

228

PROTIME	STAT	for: 01/05/2012@06:00			USER.DEMO
---------	------	-----------------------	--	--	-----------

POTASSIUM	STAT	for: 01/05/2012@06:00			USER.DEMO
-----------	------	-----------------------	--	--	-----------

229

PROTIME	STAT	for: 01/06/2012@06:00			USER.DEMO
---------	------	-----------------------	--	--	-----------

POTASSIUM	STAT	for: 01/06/2012@06:00			USER.DEMO
-----------	------	-----------------------	--	--	-----------

230

PROTIME	STAT	for: 01/07/2012@06:00			USER.DEMO
---------	------	-----------------------	--	--	-----------

231

PROTIME	STAT	for: 01/05/2012@06:00			USER.DEMO
---------	------	-----------------------	--	--	-----------


232

PROTIME	STAT	for: 01/06/2012@06:00			USER.DEMO
---------	------	-----------------------	--	--	-----------

OK

Figure 57. View Order/Test Status Report

Note: The system displays the report in ascending order date, starting with the current (today's) date.

5. If you need to review orders for a future start date:
 - a. Click the calendar icon (). A calendar opens.

- b. On the calendar, click to select the start date, and then click the Refresh button. The Order/Test Status tab refreshes with any future orders within your selected date range.
6. Click OK to close the Order/Test Status window.

5.1.7 Using the Delete Function

Delete accessioned tests not yet resulted in the lab package using these steps.

Refer to [Delete](#) in the Orientation section for details.

To delete tests:

1. In the Ribbon Bar, click the Manage tab. The Actions section opens.
2. Click the Delete icon.



Figure 58. Delete Icon

The Delete Test tab opens.

Lab Test Name	Collection Date	Provider	Status	Reason	NP
<input type="checkbox"/> SO 0326 2					
<input checked="" type="checkbox"/> ALDOLASE	3/26/2012@10:14	USER.DEMO	C	Discharge	hematology
<input type="checkbox"/> SO 0326 3					
<input type="checkbox"/> POTASSIUM	3/26/2012@10:15	USER.DEMO	C		
<input type="checkbox"/> SO 0326 4					
<input type="checkbox"/> ALDOLASE	3/26/2012@10:15	USER.DEMO	C		
<input type="checkbox"/> SO 0326 5					
<input type="checkbox"/> POTASSIUM	3/26/2012@10:15	USER.DEMO	C		
<input type="checkbox"/> SO 0326 6					
<input type="checkbox"/> ALDOLASE	3/26/2012@10:17	USER.DEMO	C		
<input type="checkbox"/> SO 0326 7					
<input type="checkbox"/> CHOLESTEROL	3/26/2012@10:17	USER.DEMO	C		
<input type="checkbox"/> SO 0326 8					
<input type="checkbox"/> LIVER FUNCTION (PANEL A)	3/26/2012@13:30	RUDD,MILES	C		
<input type="checkbox"/> SO 0326 9					
<input type="checkbox"/> CHOLESTEROL	3/26/2012@13:46	BYRON,ROBERT	C		

Figure 59. Delete Test with Discharge Reason and NP Example

3. In the first column, click to select one of the checkboxes to select Lab Tests for deletion:
 - Click the box in the header to select all tests.
 - Click the box in the section to select all tests in that section.
 - Click the box next to an individual test to select it.
4. In Accession Date, the current date defaults. Click the calendar icon (📅) to select a different date, if needed.
5. In Accession Area, click the applicable area from the drop-down menu. Sendouts is used in this example.

Note: You can select a different area from the drop-down menu, or select a different date, and then click the Refresh button. Only the tests relevant to the area or day you selected will show in the list.

6. Click the Reason button next to your selected test(s). The Select a Reason window opens.

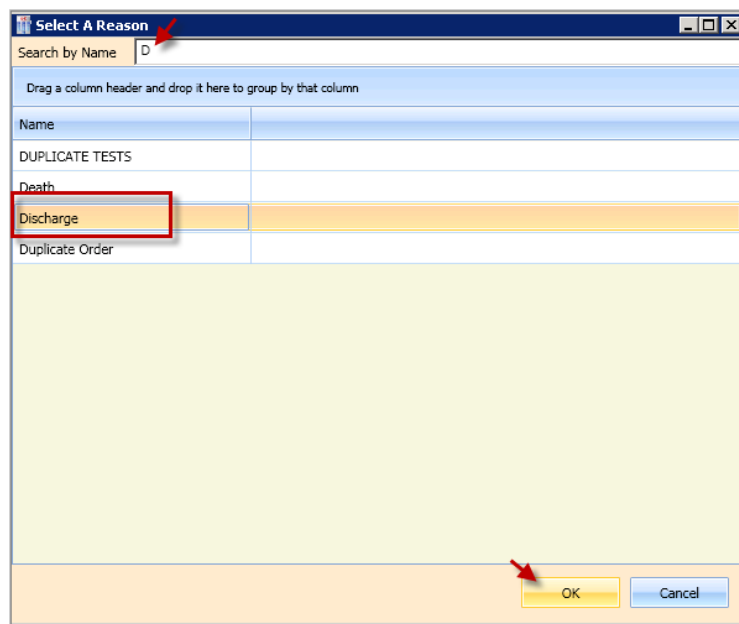


Figure 60. Select a Reason

- a. In the Search by Name field, begin typing the first few letters of the reason. The list refreshes with test reasons matching your selection.
- b. Click to select a reason, and then click OK. The reason appears in the Reason column of the Delete Test tab.

7. In NP:, type a comment for the lab description screen. This describes the type of screen this lab description is associated with (such as, gram stain, hematology, microbiology, accession comments, or smear/prep).
8. Click OK. A pop-up window opens, asking you to confirm the deletion of the selected tests.

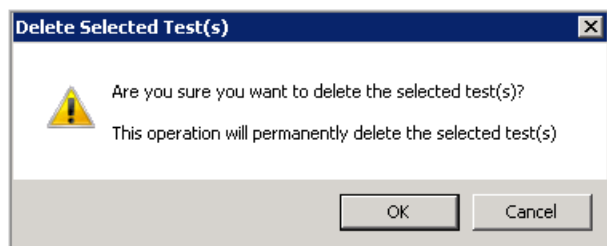


Figure 61. Delete Selected Test(s) Confirmation Box

9. Click OK again. The selected tests are deleted.

5.2 GIS Manifest Functions

The following manifest functionality (from the Manage tab) is only available at GIS configured sites.

5.2.1 Re-printing Manifests

In the event a shipping manifest fails to print or a copy must be made, you can re-print a shipping manifest list for laboratory specimens sent outside the facility to a reference lab.

Refer to [Re-Print Manifest](#) in the Orientation section for details.

To re-print manifests:

1. In the Ribbon Bar, click the Manage tab. The Actions section opens.
2. Click the Re-Print Manifest icon. The Re-Print Manifest tab opens in the Tasks pane showing all accessioned labs for today.

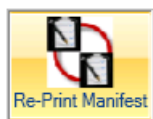


Figure 62. Re-Print Manifest Icon

3. Select the check box of the Accession Number(s) that you want to re-print the manifest(s) for, or select the check box in the header to select all of the Accession Numbers.
4. Click OK. The manifest is sent to the printer.

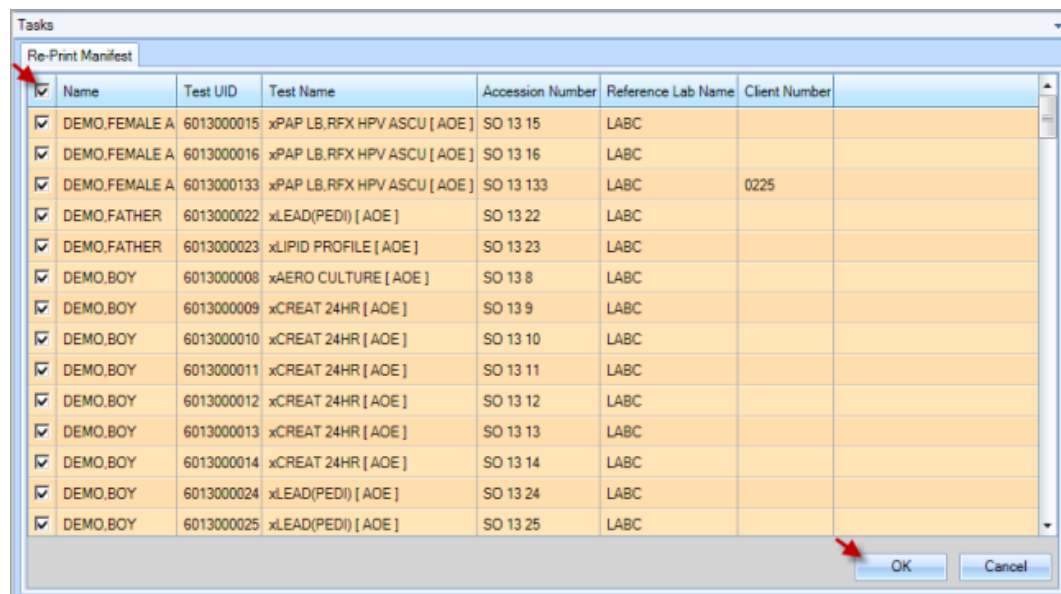


Figure 63. Selecting Accession Numbers to Print in Manifest

5.2.2 Re-Printing Labels

Refer to [Re-Print Label](#) in the Orientation section for details.

To re-print labels:

1. In the Ribbon Bar, click the Manage tab. The Actions section opens.
2. Click the Re-Print Label icon.

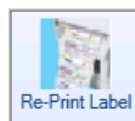


Figure 64. Re-Print Label Icon

The Re-Print Labels tab opens in the Tasks pane.

3. Click to select the check box of the UID(s) for which you want to re-print the label(s), or click the check box in the header to select all of the UIDs.
4. Click OK. The labels are sent to the printer.

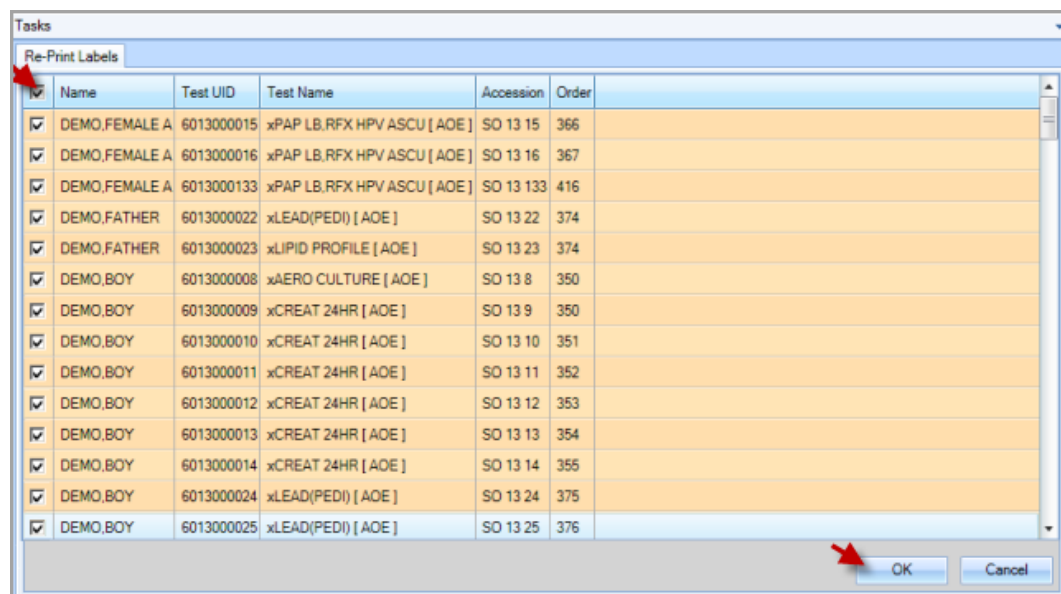


Figure 65. Selecting UIDs to Re-Print Labels

5.2.3 Using the Order/Test Status Function

Refer to [Order/Test Status](#) in the Orientation section for details.

To request a report view of the order or test statuses for a patient:

1. In the Ribbon Bar, click the Manage tab. The Actions section opens.
2. Click the Order/Test Status icon. The Select a Patient window opens.



Figure 66. Order/Test Status Icon

3. In the Search by Name, DOB, SSN, or HRN field, begin typing the desired criteria. The window refreshes with a list of patients matching your criteria.

Select A Patient

Search by Name, DOB or HRN

Drag a column header and drop it here to group by that column

Name	HRN	DOB	Status
DEMO,BOY	45444	APR 16,1998	INACTIVE INPATIENT
DEMO,FATHER	5465	MAR 5,1955	INACTIVE INPATIENT
DEMO,FATHER	T00003	JAN 27,1957	INACTIVE INPATIENT
DEMO,FEMALE A	21334	AUG 10,1976	INACTIVE INPATIENT
DEMO,INFANT	12	FEB 14,2007	INACTIVE INPATIENT
DEMO,INPATIENT F	25422	MAY 20,1938	ACTIVE INPATIENT
DEMO,MOTHER R	3423	SEP 2,1957	ACTIVE INPATIENT
DEMO,TEEN	32434	OCT 12,1991	INACTIVE INPATIENT
DEMO,TODDLER	36665	JUN 3,2001	INACTIVE INPATIENT

OK Cancel


Figure 67. Search by Name, DOB, SSN or HRN

4. Click to select the desired patient, and then click OK. The Tasks pane refreshes with a new Order/Test Status [patient name] tab, containing the following columns:
 - Test (order number and name of test)
 - Urgency (status, such as STAT)
 - Status (date and time or Collected)
 - Accession status (shows Accession # is accessioned)
 - Sign or Symptom
 - Provider

Test	Urgency	Status	Accession	Sign Or Symptom	Provider	
^ 227						
URINALYSIS-DIPSTICK ONLY	STAT	Collected	UA 0104 1	Adjustment Disorder With Anxiety	USER.DEMO	
^ 228						
PROTIME	STAT	for: 01/05/2012@06:00			USER.DEMO	
POTASSIUM	STAT	for: 01/05/2012@06:00			USER.DEMO	
^ 229						
PROTIME	STAT	for: 01/06/2012@06:00			USER.DEMO	
POTASSIUM	STAT	for: 01/06/2012@06:00			USER.DEMO	
^ 230						
PROTIME	STAT	for: 01/07/2012@06:00			USER.DEMO	
^ 231						
PROTIME	STAT	for: 01/05/2012@06:00			USER.DEMO	
^ 232						
PROTIME	STAT	for: 01/06/2012@06:00			USER.DEMO	

Figure 68. View Order/Test Status Report

Note: The system displays the report in ascending order date, starting with the current (today's) date.

5. If you need to review orders for a future start date:
 - a. Click the calendar icon (). A calendar opens.
 - b. On the calendar, click to select the start date, and then click the Refresh button. The Order/Test Status tab refreshes with any future orders within your selected date range.
6. Click OK to close the Order/Test Status window.

5.2.4 Using the Delete Function

Delete accessioned tests not yet resulted in the lab package using these steps.

Refer to [Delete](#) in the Orientation section for details

To delete tests:

1. In the Ribbon Bar, click the Manage tab. The Actions section opens.
2. Click the Delete icon.



Figure 69. Delete Icon

The Delete Test tab opens.

Lab Test Name	Collection Date	Provider	Status	Reason	NP
SO 0326 2					
<input checked="" type="checkbox"/> ALDOLASE	3/26/2012@10:14	USER.DEMO	C	Discharge	hematology
SO 0326 3					
<input type="checkbox"/> POTASSIUM	3/26/2012@10:15	USER.DEMO	C		
SO 0326 4					
<input type="checkbox"/> ALDOLASE	3/26/2012@10:15	USER.DEMO	C		
SO 0326 5					
<input type="checkbox"/> POTASSIUM	3/26/2012@10:15	USER.DEMO	C		
SO 0326 6					
<input type="checkbox"/> ALDOLASE	3/26/2012@10:17	USER.DEMO	C		
SO 0326 7					
<input type="checkbox"/> CHOLESTEROL	3/26/2012@10:17	USER.DEMO	C		
SO 0326 8					
<input type="checkbox"/> LIVER FUNCTION (PANEL A)	3/26/2012@13:30	RUDD,MILES	C		
SO 0326 9					
<input type="checkbox"/> CHOLESTEROL	3/26/2012@13:46	BYRON,ROBERT	C		

Figure 70. Delete Test with Discharge Reason and NP Example

- In the first column, click to select one of the checkboxes to select Lab Tests for deletion:
 - Click the box in the header to select all tests.
 - Click the box in the section to select all tests in that section.
 - Click the box next to an individual test to select it.
- In Accession Date, the current date defaults. Click the calendar icon (📅) to select a different date, if needed.
- In Accession Area, click the applicable area from the drop-down menu. Sendouts is used in this example.

Note: You can select a different area from the drop-down menu, or select a different date, and then click the Refresh button. Only the tests relevant to the area or day you selected will show in the list.

6. Click the Reason button next to your selected test(s). The Select a Reason window opens.

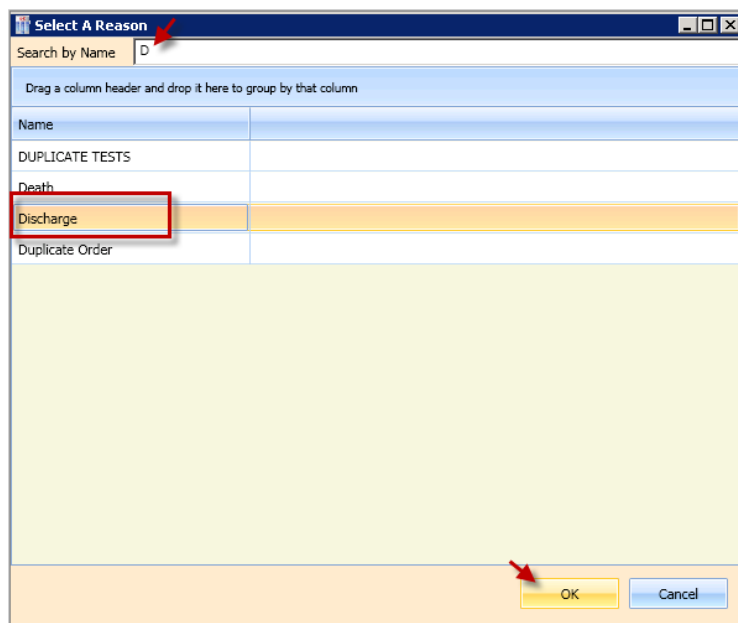


Figure 71. Select a Reason

- a. In the Search by Name field, begin typing the first few letters of the reason. The list refreshes with test reasons matching your selection.
 - b. Click to select a reason, and then click OK. The reason appears in the Reason column of the Delete Test tab.
7. In NP:, type a comment for the lab description screen. This describes the type of screen this lab description is associated with (such as, gram stain, hematology, microbiology, accession comments, or smear/prep).
 8. Click OK. A pop-up window opens, asking you to confirm the deletion of the selected tests.

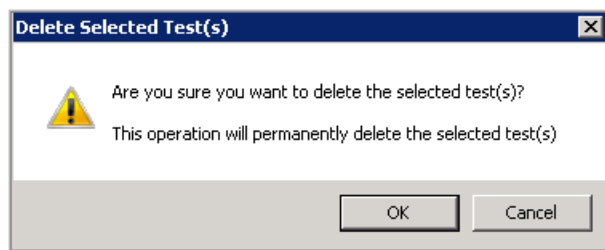


Figure 72. Delete Selected Test(s) Confirmation Box

9. Click OK again. The selected tests are deleted.

6.0 Contact Information

If you have any questions or comments regarding this distribution, contact the OIT User Support (IHS) by:

Phone: (888) 830-7280

Web: <http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm>

Email: <mailto:support@ihs.gov>