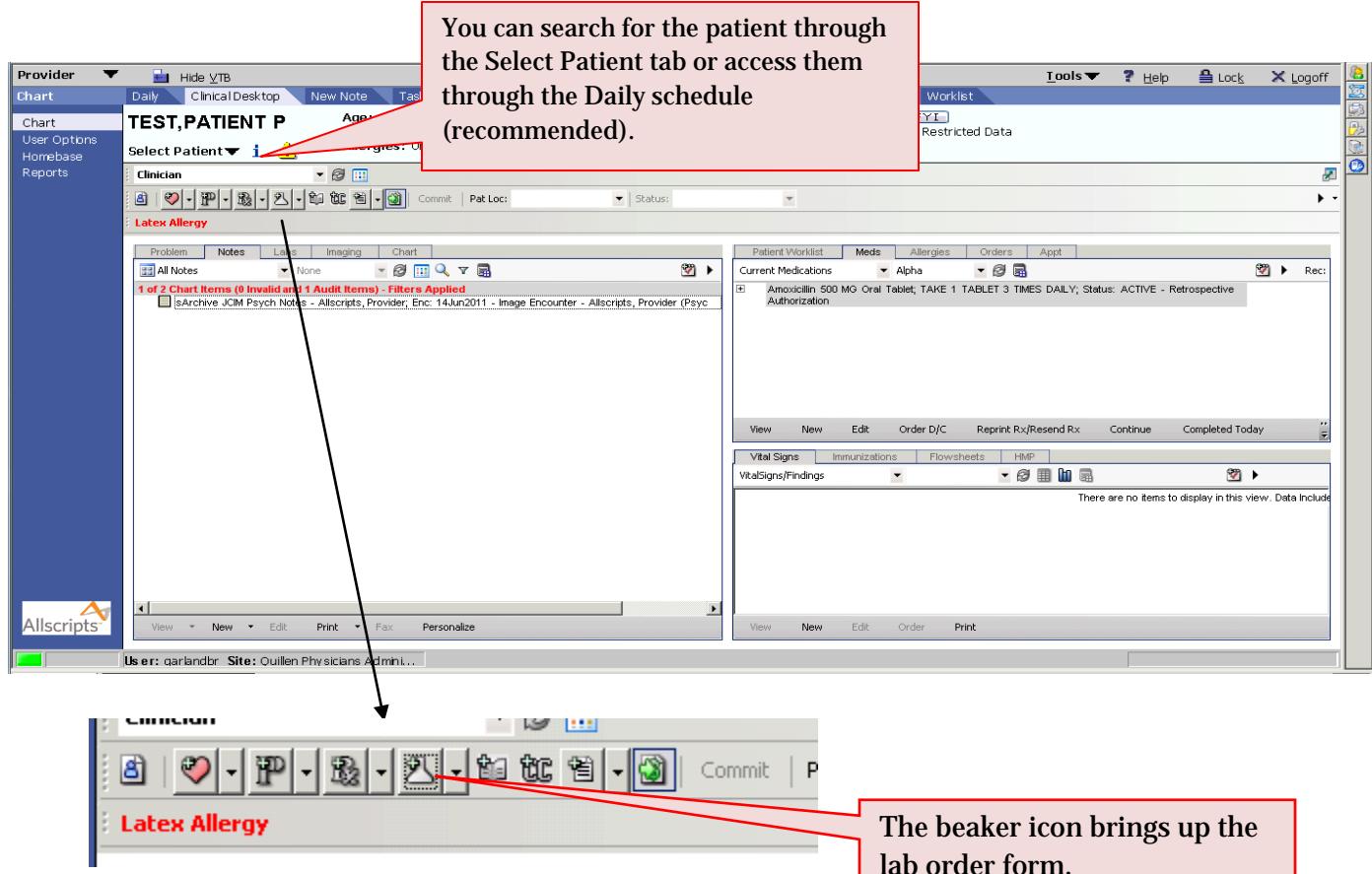


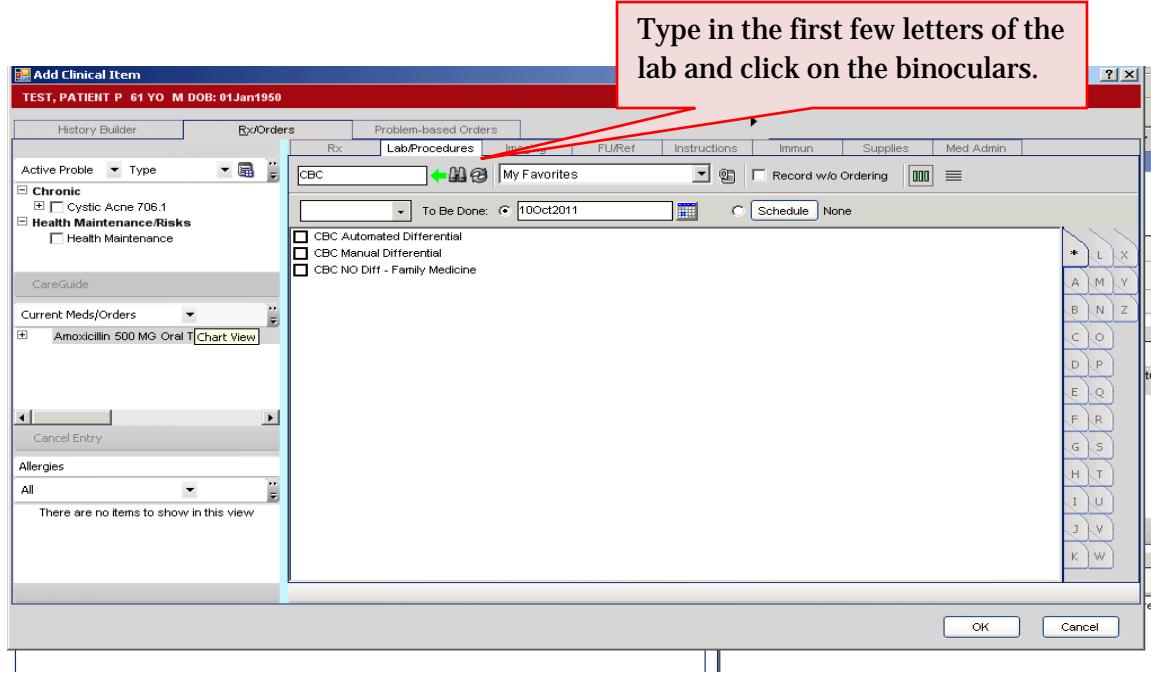
## Ordering Labs

Quillen Physicians Residents and Providers can send a lab order through the Allscripts Enterprise EHR system by following the steps provided below:

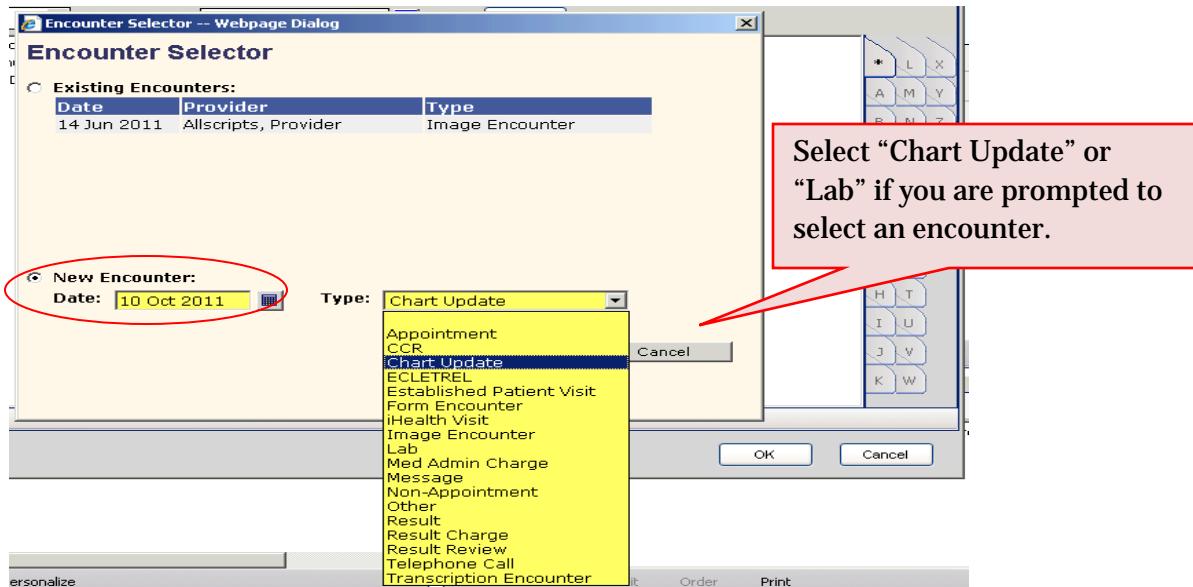
1. Bring up the patient's Clinical Desktop (chart) either by going through the Daily schedule (recommended) or by searching for the patient through the Select Patient button.
2. Once the patient's chart has been located, click on the beaker icon to search for the lab.



3. The "Add Clinical Item" box appears, where you can search for the lab you would like to order. Type in the first few letters of the lab's name and click on the binoculars. In the example below, the user is ordering a CBC.
4. Check the box next to the lab you would like to order, and a details screen will pop up for the required information to be added for the order.

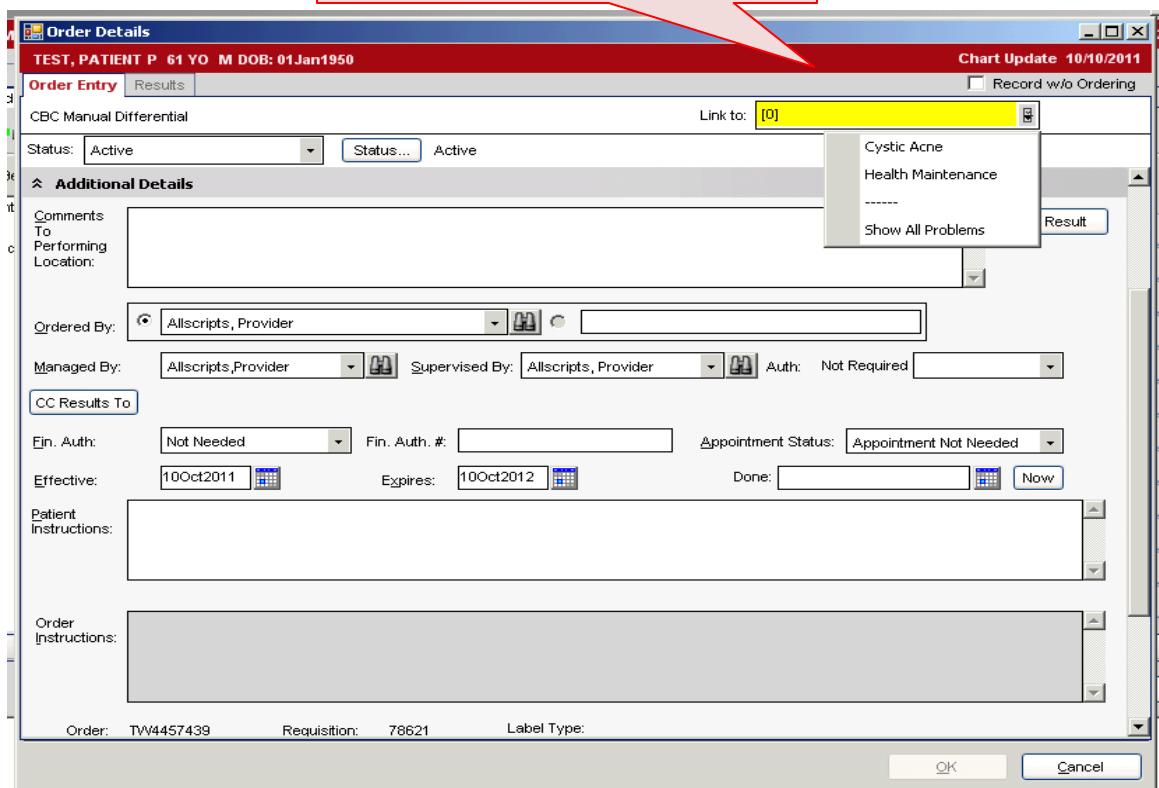


5. If you accessed the patient's chart by searching for the patient, an Encounter Selector will appear first. (If the patient was accessed through the Daily Schedule, you will not be required to choose an encounter.) Select "New Encounter" and either "Lab" or "Chart Update."



6. In the "Order Details" screen, enter all the required information for processing the lab (highlighted in yellow), plus any additional information you want to send to the lab. Pay particular attention to the "Link to" field. An **accurate** Active Problem must be selected. \*\*\*Do not choose simply choose "Health Maintenance," as this could result in the patient or the office being charged for the lab. \*\*\*

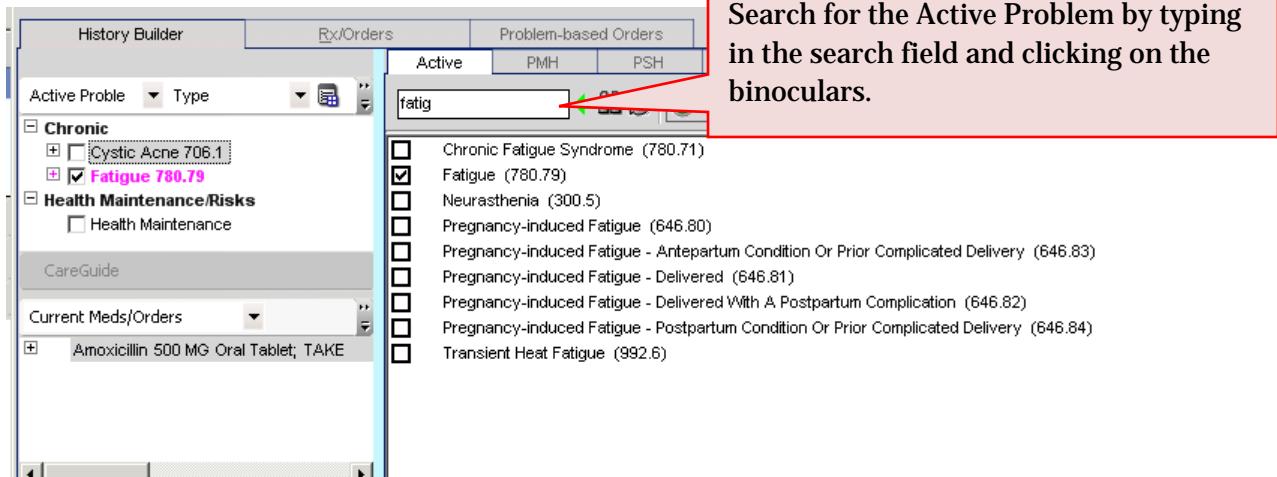
Make sure to choose an acute Active Problem. Do not simply choose Health Maintenance.



7. If an accurate Active Problem is not available, you will need to add it by closing the Order Details screen and clicking on the “P” icon (next to the beaker icon on the Clinical Toolbar).



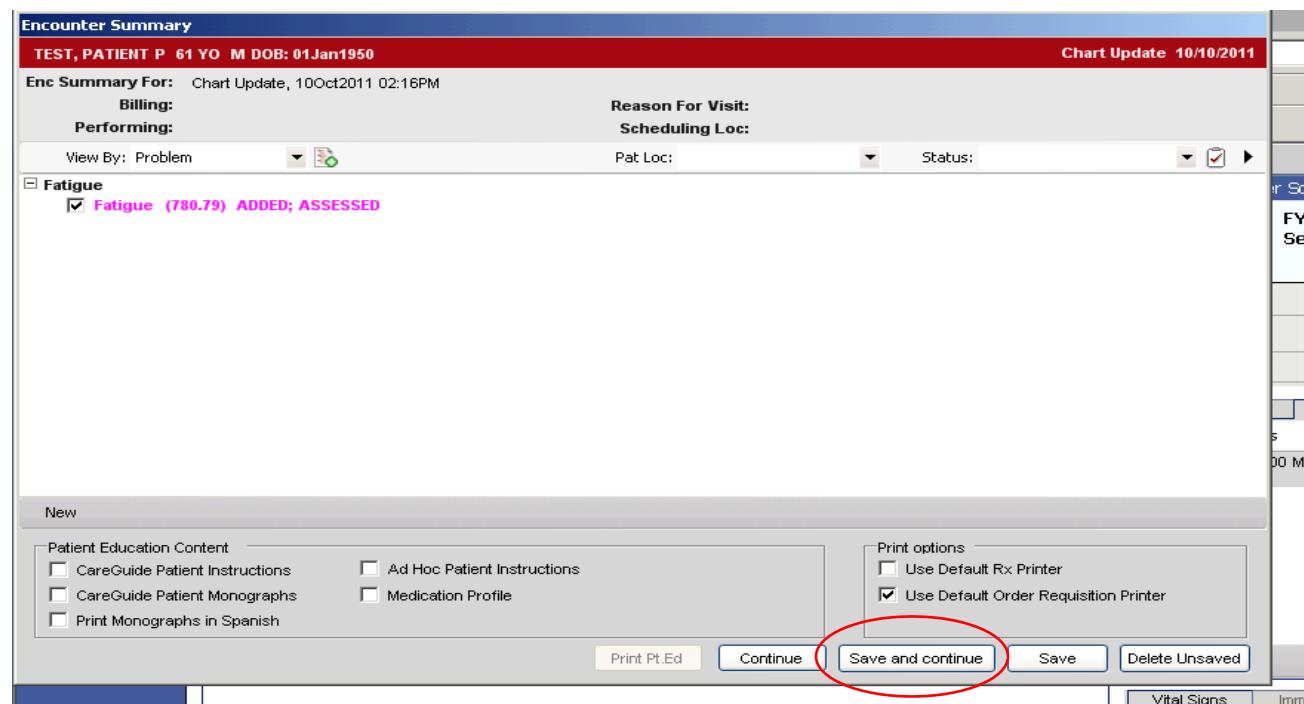
8. Search for the Active Problem by typing in the first few letters and clicking the binoculars. In the example below, the user was searching for Fatigue (780.79) as an active problem for ordering a CBC.



9. Check the box next to the Active Problem, and it will be added to the Active Problems list on the left side of the screen. Note that the font will be magenta until it has been “committed” by clicking on the yellow “Commit” button.



10. An Encounter Summary will pop up listing the Active Problem. Make sure it is correct and click “Save and Continue.”



11. Once an Active Problem has been added, return to the lab order screen and select the correct Active Problem in the “Link to” drop-down menu. In addition, the following fields should be double checked for accuracy:

- Location (should read “Orchard Lab”)
- Communicated by (should read “Send to Performing Location”)
- To be Done date (should be the date the person needs to have the lab performed, unless your particular office has a different workflow))
- Ordered by, Managed by, and Supervised by fields (**for Residents, the Supervised field should be the Attending physician or Preceptor’s name**)

Choose the correct Active problem.

Make sure the performing location and communication method are accurate.

Double check that the providers have been entered correctly.

The screenshot shows the 'Order Details' window for a patient named TEST, PATIENT P, 61 YO, M, DOB: 01Jan1950. The chart update is 10/10/2011. The order is for a 'CBC Manual Differential'. The 'Status' is set to 'Active'. The 'To Be Performed' field is set to 'Orchard Lab'. The 'Communicated By' field is set to 'Send to Performing Location'. The 'Overdue In' field shows '14 Days' until 24Oct2. The 'Order Details' section includes fields for 'Ordered By' (Allscripts, Provider), 'Managed By' (Allscripts, Provider), 'Supervised By' (Allscripts, Provider), and 'Auth' (Not Required). The 'Effective' date is 10Oct2011, and it expires on 10Oct2012. The 'Appointment Status' is 'Appointment Not Needed'. The 'Cite Result' button is visible at the top right. The bottom right of the window has buttons for 'Save and Return to ACI', 'Save and Close ACI', and 'Cancel'.

12. Once all the required fields have been filled in, you can “Save and Return” if more labs need to be entered or “Save and Close” if you are finished ordering. Click on the yellow Commit button, and an Encounter Summary will appear. If it is accurate, you can “Save and Continue.” Your lab order will be sent immediately.

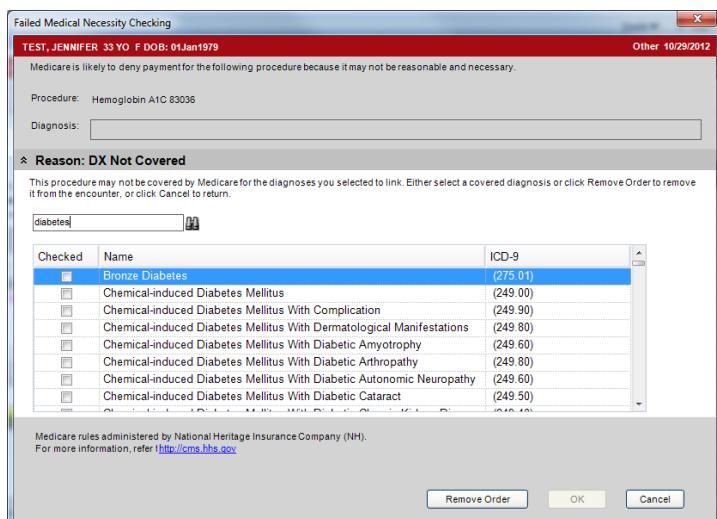
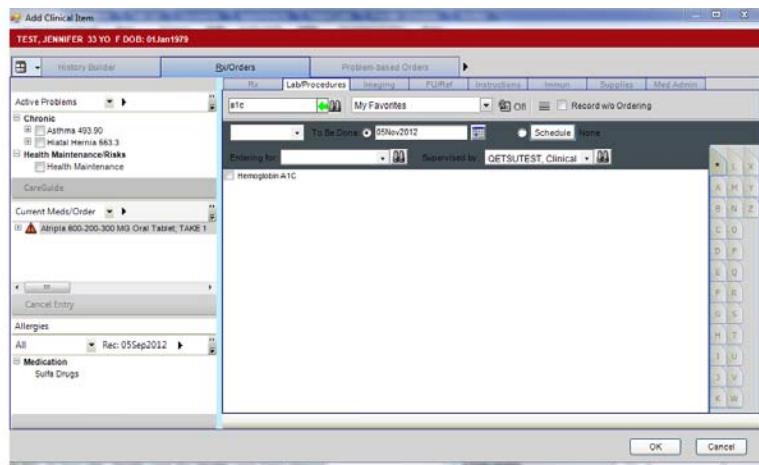
The screenshot shows the 'Encounter Summary' window for the same patient. The chart update is 10/10/2011. The 'Enc Summary For' field shows 'Chart Update, 10Oct2011 02:16PM'. The 'Billing' and 'Performing' fields are listed. The 'Reason For Visit' section shows 'Fatigue' checked. The 'Scheduling Loc:' field is empty. The 'View By' dropdown is set to 'Problem'. The 'Pat Loc:' and 'Status:' dropdowns are also present. Below this, a list of problems is shown: Fatigue (780.79) ADDED, ASSESSED; ASSESSED and CBC Manual Differential Status: Active Requested for: 10Oct2011 (Fatigue) Send to Performing Location; Orchard Lab; ADDED. The bottom section is titled 'New' and contains 'Patient Education Content' with checkboxes for CareGuide Patient Instructions, CareGuide Patient Monographs, and Print Monographs in Spanish. It also contains 'Print options' with checkboxes for Use Default Rx Printer and Use Default Order Requisition Printer. At the bottom are buttons for Print Pt Ed, Continue, Save and continue, Save, and Delete Unsaved.

## **Scheduling Recurring Labs**

Sometimes it may be convenient to set up a recurring schedule for lab orders, especially for patients that come in frequently to have labs drawn.

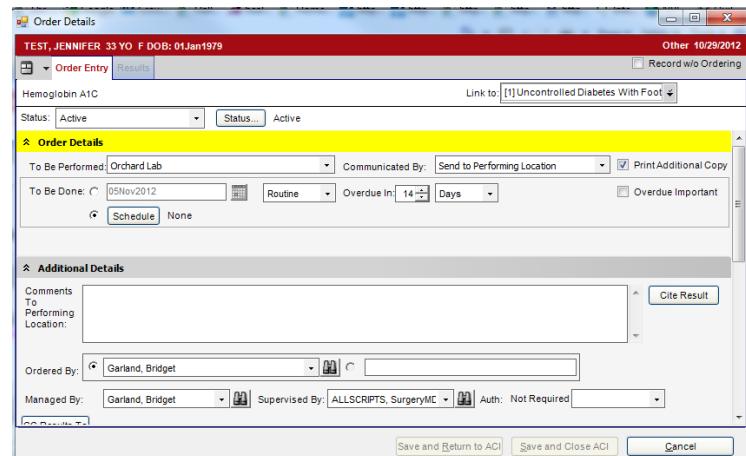
### **Step One**

To do so, search for the lab you want to order and/or schedule under the Labs/Procedure tab. Check the box to order it.



### **Step Two**

If you are prompted with the Medical Necessity Checking box, search for an acceptable diagnosis, click the box, and then hit "Ok."



### **Step Three**

When the Order Details box appears, click on the Schedule button.

## **Step Five**

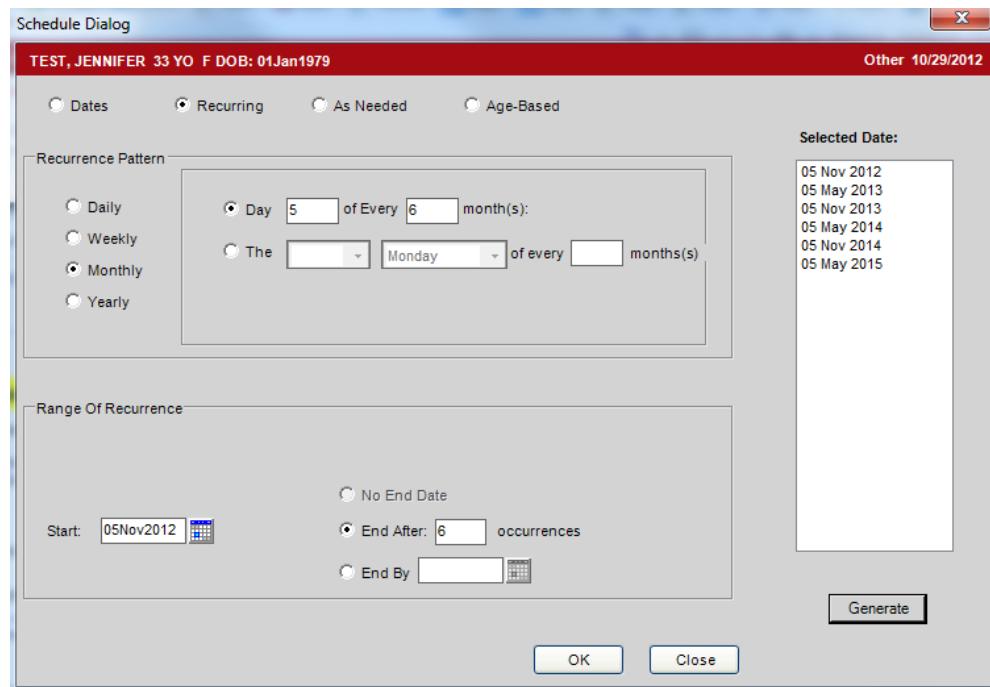
A Schedule Dialog box will pop up, in which you can set up the recurring schedule, either Daily, Weekly, Monthly, or Yearly.

Click on the appropriate choice, and then enter how often the lab order needs to generate.

Note that the Start date under "range of Recurrence" needs to be the day the first order needs to generate.

Choose how long you want the occurrence to be set up, then click on **Generate** to generate the dates.

Click Ok.



## **Step Six**

After you click the Commit button, the order generates, and the scheduled future orders also appear under the Orders tab.

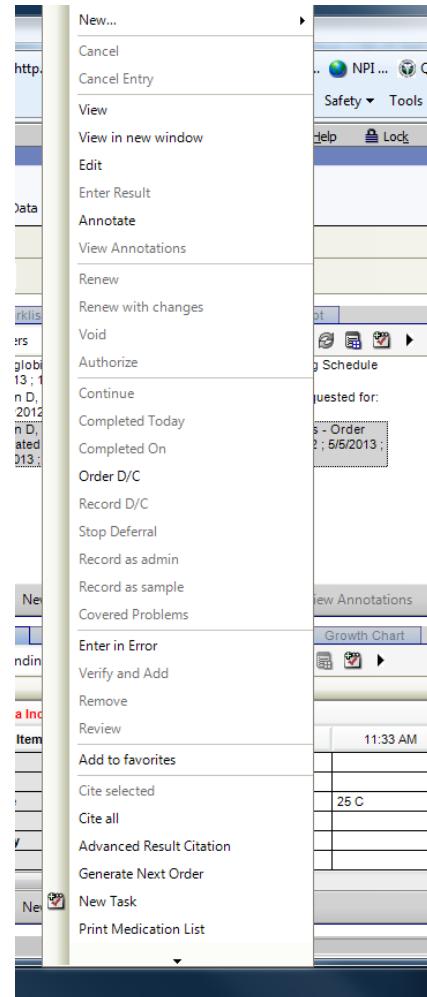
The screenshot shows the 'Patient Worklist' interface. The top navigation bar includes tabs for 'Patient Worklist', 'Meds', 'Allergies', 'Orders', and 'Appt'. The 'Orders' tab is active. Below the tabs, there are dropdown menus for 'Current Orders' (set to 'None') and 'Sort By' (set to 'Alpha'). The main area displays three generated orders, each preceded by a smiley face icon:

- Hemoglobin A1C Status: Active Requested for: Recurring Schedule 5/1/2013 ; 11/1/2013 ; 5/1/2014 ; 11/1/2014
- Vitamin D, 25 Hydroxy, Total , D2 , D3 Status: Active Requested for: 05Nov2012
- Vitamin D, 25 Hydroxy, Total , D2 , D3 Status: In Progress - Order Generated Requested for: Recurring Schedule 11/5/2012 ; 5/5/2013 ; 11/5/2013 ; 5/5/2014 ; 11/5/2014 ; 5/5/2015

At the bottom of the screen, there are buttons for 'View', 'New', 'Enter in Error', 'Annotate', and 'View Annotations'.

## **Step Seven**

If a scheduled lab order needs to be generated before the date on the lab schedule (for example, the patient has an appointment a couple of days earlier than the lab date, right click on the order and then select Generate Order.



## **Step Eight**

The next order will generate and once committed, the order will be sent to the lab.

A screenshot of a Patient Worklist interface showing a list of current orders. The orders are:

- Hemoglobin A1C Status: Active Requested for: Recurring Schedule 5/1/2013 ; 11/1/2013 ; 5/1/2014 ; 11/1/2014
- Vitamin D, 25 Hydroxy, Total , D2 , D3 Status: Active Requested for: 05Nov2012
- Vitamin D, 25 Hydroxy, Total , D2 , D3 Status: In Progress - Order Generated Requested for: Recurring Schedule 11/5/2012 ; 5/5/2013 ; 11/5/2013 ; 5/5/2014 ; 11/5/2014 ; 5/5/2015
- Vitamin D, 25 Hydroxy, Total , D2 , D3 Status: Active Requested for: 05May2013

The interface includes tabs for Patient Worklist, Meds, Allergies, Orders (selected), and Appt. Below the orders is a toolbar with icons for New, Enter in Error, Annotate, and View Annotations.