Med Software LLC
Created: 7/5/2011
Version: 3

By:BB

Lab Orders
&
Lab Log
User Instruction

RESource

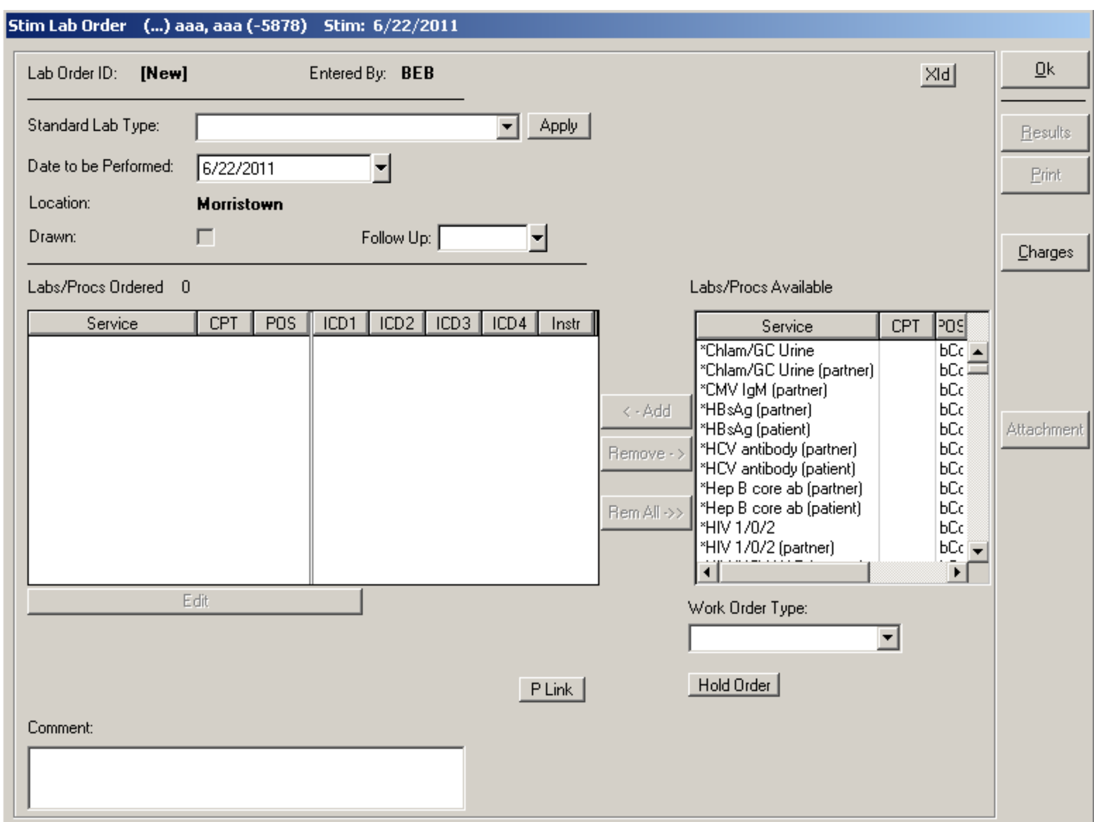
Lab Orders

The Lab column in the stim sheet is where lab orders are entered. Lab orders can also be entered via the Patient menu, if the option is enabled there. Lab orders do not have to be limited to blood work orders only – any service can be set up as a "lab" and available in a lab order (i.e. baseline uss, pap).

To create a new lab order:

1 – select the patient and cycle in the patient explorer

2 – on the desired stim date (create a new stim row if needed), double click on the Lab field or right click and select Modify Lab Order. The Stim Lab Order form will appear.



3 – the Lab Order ID, Entered By, Date to be Performed and Location will automatically be entered. To change the Date to be Performed, select a date from the calendar dropdown.

Note: The Date to be Performed should always match the given stim date.

- **Standard Lab Type** – a dropdown list containing pre-determined groups of lab orders (a shortcut to selecting each individual lab from the available labs list)

- **Location** – reflects the stim row location (where the order is to be completed). Each stim row will reflect the location of the prior stim row unless manually changed. By default, the first stim row of a cycle will be assigned the location where the cycle was created.

  To change a stim row location:
  1 – select the stim row, right click and select Stim Location

  2 – select the desired location from the dropdown and click OK

- **Drawn** – to be checked off when the phlebotomist has drawn the blood

- **Follow Up** – the date the lab order is to be followed up on (optional). If a date is selected, the primary nurse and primary physician will receive a reminder when logging on to RESource that day.

4 – select a lab order group from the Standard Lab Type dropdown list and click Apply

AND/OR

Select a lab from the Labs/Procs Available list and click Add. You may apply multiple lab groups from the Standard Lab Type list and you may also add individual labs from the Labs/Procs Available list in combination with any lab groups. Any labs orders will appear in the Labs/Procs Ordered list.

Labs/Procs Ordered - lists each lab/procedure/service that has been ordered

- **Work Order Type** – select a work order type from the dropdown to filter the Labs/Procs Available list

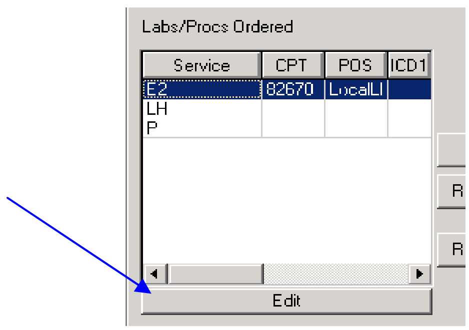
Labs/Procs Available - lists each lab/procedure/service that is available for ordering. You will notice POS and CPT fields for each lab – default values may appear, but you cannot edit them until the lab is ordered.

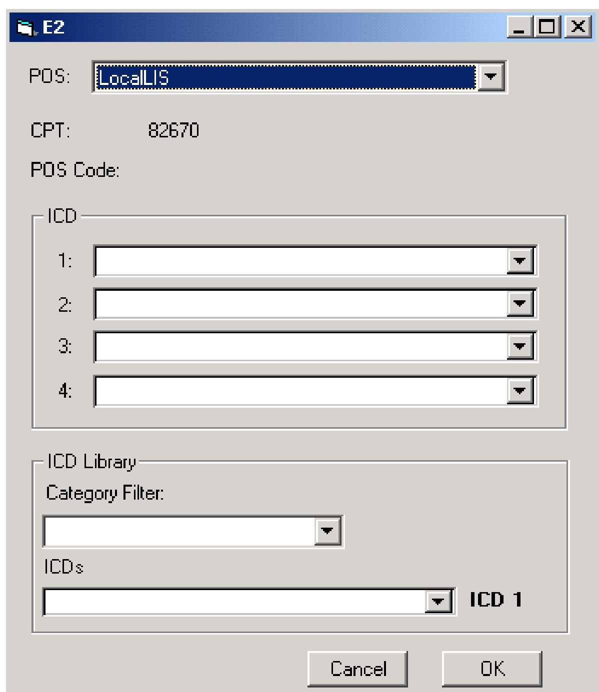
- **CPT** – CPT (procedure) code for the lab

- **POS** – Point of Service for the lab. A default POS may appear – to edit the POS, double click on the POS field for that lab or click the Edit button

- **ICD** – ICD 9 (diagnosis) code for the lab. A default ICD may appear – to change the ICD, double click on the POS field for that lab or click the Edit button

- **Instr** – a comment field allowing the entry of any specific instructions/comments for the given lab item. Clicking this field will bring up a Zoom window where text can be entered.





To change the POS for the lab, select an option from the POS dropdown.

To assign one or multiple (up to 4) ICD codes for the lab:

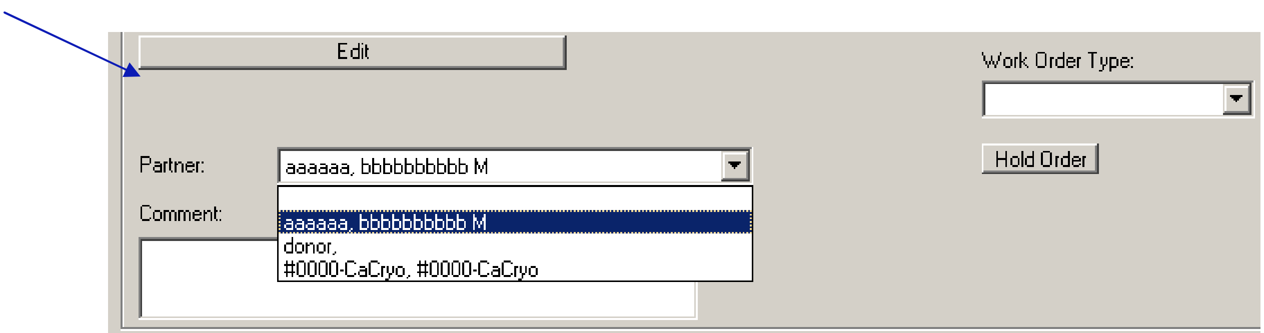
1 – in the ICD Library section, select the appropriate Category Filter – if you don't know what filter to use simply select All

2 – select the desired ICD from the ICDs dropdown (ICD 1 will appear next to it) – this will assign ICD number 1

3 – repeat steps 1 and 2 for each ICD you wish to assign to the lab. Click OK when done. All changes will now appear associated with the lab in the lab order.

TIP
To remove an ordered lab, select the lab in the Labs/Procs Ordered list and click Remove. To remove all ordered labs click the Rem All (Remove All) button.

5 – if the lab order contains labs for a partner, click the **P Link** button – a dropdown will appear displaying all partner records not marked as Not Active (either Active has been checked off, or neither Active nor Not Active have been checked)



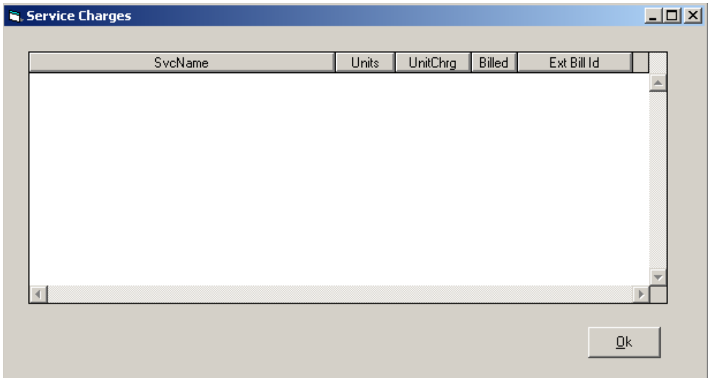
6 – enter any comments in the comment area at the bottom of the form

7 – click OK

Hold Order - *Currently only the Quest interface supports this feature.*

This button allows indicating that labs bound for a particular POS in the order (only applies to Quest at this time) are to be flagged for Holding. This means the POS will hold the electronic order for processing at their center until the patient arrives at a POS draw station with the paper requisition for draw. If any POS's are checked for Hold on an order, the button will display in yellow.

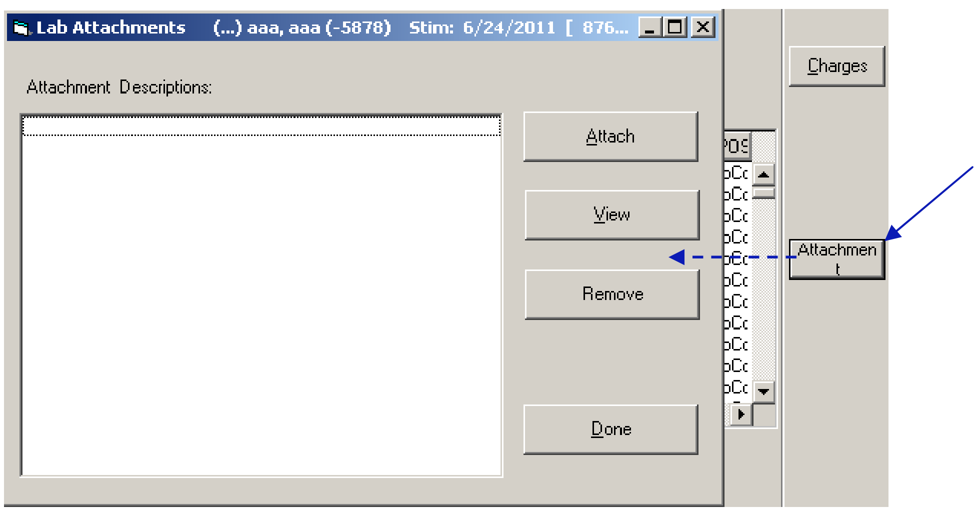
Charges – clicking this button displays the Service Charges window.



Attachments – clicking this button displays the Lab Attachments window

To Attach a document:

1 – From the desired lab order, click Attachments. The Lab Attachments window will appear



2 – Click Attach

3 – From the Attach File browse window that appears, locate the attachment and click Open. The file will now be listed in the Lab Attachments window.

4 – Click Done

To View an attachment:

1 – From the desired progress note click Attachments. The Progress Note Attachments window will appear.

2 – Select the attachment you want to view and click View

3 – Click Done

To Remove an attachment:

1 – From the desired progress note click Attachments. The Progress Note Attachments window will appear.

2 – Select the attachment you want to remove and click Remove

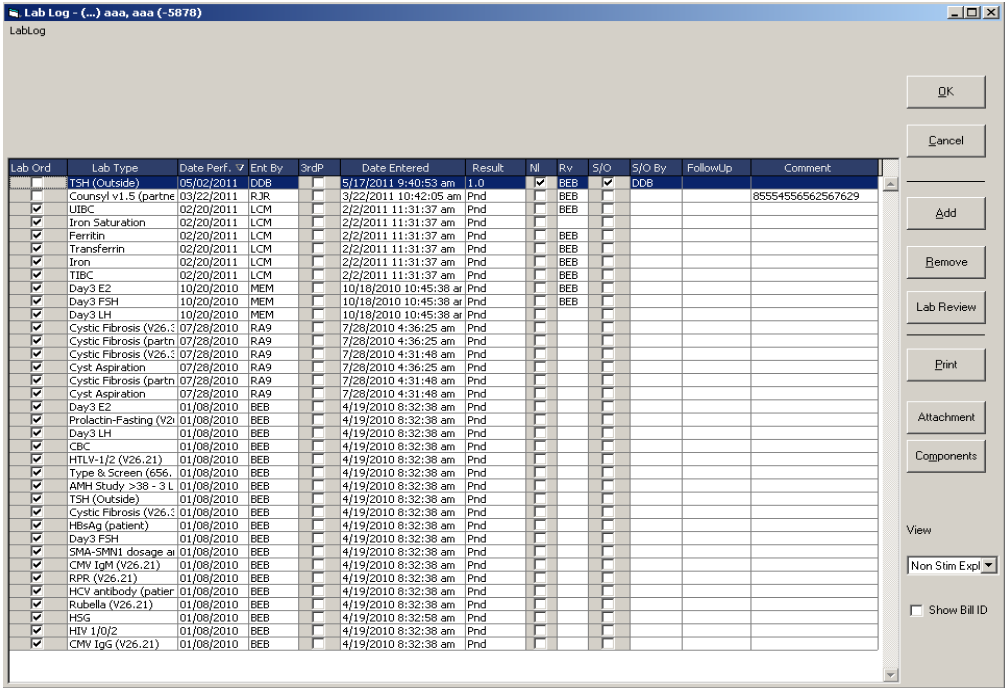
3 – Click Done

Once a lab order has been marked as Drawn, its contents will be stored in the lab log with a result of Pnd. Lab Results can be entered via the actual lab order, through the lab log, or through the LIS posting feature (if enabled).

Results for the 6 "stim" labs will be displayed on the stim sheet: E2, P4, bHCG, FSH, LH and TSH. When the lab order for a given day contains any of these labs and has been marked as Drawn, 'Pnd' will appear in the appropriate field on the stim sheet. Once lab results have been entered for these labs, the actual results will appear. (Even though these labs appear on the stim sheet they will also appear in the Lab Log.)

Lab Log

Each patient will have a lab log where all labs will be displayed with their results. Any lab ordered and marked as 'drawn' within RESource will automatically appear in the lab log – results for these labs can be entered through the lab order itself or through the Lab Log. Relevant patient labs not ordered through RESource may also be entered into the lab log (Type & Rh, current Pap done elsewhere, etc). To access a patient's lab log, select the patient in the patient explorer, go to the Patient menu and select Labs – Lab Log. The shortcut icon for the Lab Log is .



Lab Ord	Lab Type	Date Perf.	Ent By	3rdP	Date Entered	Result	Nl	Rv	S/O	S/O By	FollowUp	Comment
☐	TSH (Outside)	05/02/2011	DDB	☐	5/17/2011 9:40:53 am	1.0	☑	BEB	☑	DDB		
☐	Counsyl v1.5 (partne	03/22/2011	RJR	☐	3/22/2011 10:42:05 am	Pnd	☐	BEB	☐			85554556562567629
☑	UIBC	02/20/2011	LCM	☐	2/2/2011 11:31:37 am	Pnd	☐	BEB	☐			
☑	Iron Saturation	02/20/2011	LCM	☐	2/2/2011 11:31:37 am	Pnd	☐		☐			
☑	Ferritin	02/20/2011	LCM	☐	2/2/2011 11:31:37 am	Pnd	☐	BEB	☐			
☑	Transferrin	02/20/2011	LCM	☐	2/2/2011 11:31:37 am	Pnd	☐	BEB	☐			
☑	Iron	02/20/2011	LCM	☐	2/2/2011 11:31:37 am	Pnd	☐	BEB	☐			
☑	TIBC	02/20/2011	LCM	☐	2/2/2011 11:31:37 am	Pnd	☐	BEB	☐			
☑	Day3 E2	10/20/2010	MEM	☐	10/18/2010 10:45:38 ar	Pnd	☐	BEB	☐			
☑	Day3 FSH	10/20/2010	MEM	☐	10/18/2010 10:45:38 ar	Pnd	☐	BEB	☐			
☑	Day3 LH	10/20/2010	MEM	☐	10/18/2010 10:45:38 ar	Pnd	☐		☐			
☑	Cystic Fibrosis (V26.3	07/28/2010	RA9	☐	7/28/2010 4:36:25 am	Pnd	☐		☐			
☑	Cystic Fibrosis (partn	07/28/2010	RA9	☐	7/28/2010 4:36:25 am	Pnd	☐		☐			
☑	Cystic Fibrosis (V26.3	07/28/2010	RA9	☐	7/28/2010 4:31:48 am	Pnd	☐		☐			
☑	Cyst Aspiration	07/28/2010	RA9	☐	7/28/2010 4:36:25 am	Pnd	☐		☐			
☑	Cystic Fibrosis (partn	07/28/2010	RA9	☐	7/28/2010 4:31:48 am	Pnd	☐		☐			
☑	Cyst Aspiration	07/28/2010	RA9	☐	7/28/2010 4:31:48 am	Pnd	☐		☐			
☑	Day3 E2	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	Prolactin-Fasting (V2	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	Day3 LH	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	CBC	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	HTLV-1/2 (V26.21)	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	Type & Screen (656.	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	AMH Study >38 - 3 L	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	TSH (Outside)	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	Cystic Fibrosis (V26.3	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	HBsAg (patient)	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	Day3 FSH	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	SMA-SMN1 dosage ai	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	CMV IgM (V26.21)	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	RPR (V26.21)	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	HCV antibody (patier	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	Rubella (V26.21)	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	HSG	01/08/2010	BEB	☐	4/19/2010 8:32:58 am	Pnd	☐		☐			
☑	HIV 1/0/2	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			
☑	CMV IgG (V26.21)	01/08/2010	BEB	☐	4/19/2010 8:32:38 am	Pnd	☐		☐			

The Lab Log consists of columns whose width can be expanded/contracted by moving the cursor over the column border and dragging it. The Lab Log can also be sorted by any of the columns by clicking on the desired column header. By default, the Lab Log is sorted by Date Performed in descending order. You can also choose to view All labs or Non Stim labs only by selecting from the View dropdown list on the right side of the Lab Log. By default the Lab Log displays non stim labs since the stim labs are visible in the stim sheet.

Lab Ord – Lab Order. If checked, this indicates that the order originated from a lab order within RESource

Lab Type – name of the lab

Date Perf. – Date Performed. The date the testing was performed (the Date to be Performed, if ordered through RESource)

Ent By – Entered By. The user that entered the lab and results into the Lab Log.

3rdP – Third Party. If checked, this indicates that the order was performed at a 3rd party laboratory. Some clinics use this field to indicate that the lab was ordered by an outside physician.

Date Entered – the date the lab result was entered

Result – lab result

Nl – Normal. Indicates a normal lab result

Rv – Reviewed. Displays the initials of the physician who reviewed the lab results.

S/O – Signed Off. If checked, the lab has been signed off.

S/O By – Signed Off By. The user who signed off on the lab result.

Follow Up – Follow Up Date. If a follow up is desired a date can be entered in this field – upon logging in to RESource on that date, a lab follow up reminder will appear in the Reminders window (for the primary physician and primary nurse).

Comment – any comments pertaining to the lab may be entered here

To enter results for a lab in the Lab Log:

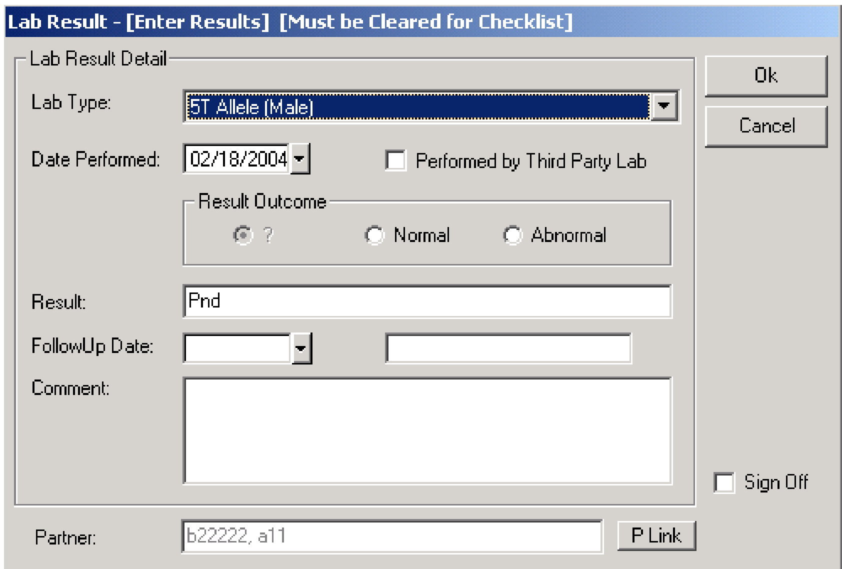
1 – in the Lab Log, select the row containing the lab and double click

2 – the Lab Result form will appear. Check off 'Performed by Third Party Lab' if applicable. Enter the result in the Result field and check off Normal or Abnormal.

3 – enter a Follow Up date and/or a Comment if desired

4 – if the lab was ordered for the patient's partner (through the patient record) you can use the P Link (Partner Link) button to indicate the partner name. Click the P Link button and select the desired partner name from the drop down. Note that if the partner name already appears, the Link was probably done in the originating lab order and there is no need to link the Partner name again.

5 – check off **Sign Off** if applicable. Note that if the lab is a required item in the patient's checklist it must be signed off in order to be considered complete and therefore removed from the outstanding checklist items.



To enter a lab into the Lab Log without a previous order for it in RESource:

1 – in the Lab Log, click the Add button

2 – the Lab Result form will appear. Select the Lab Type from the drop down list and select the Date Performed.

3 – follow steps 2 – 5 above to complete the form

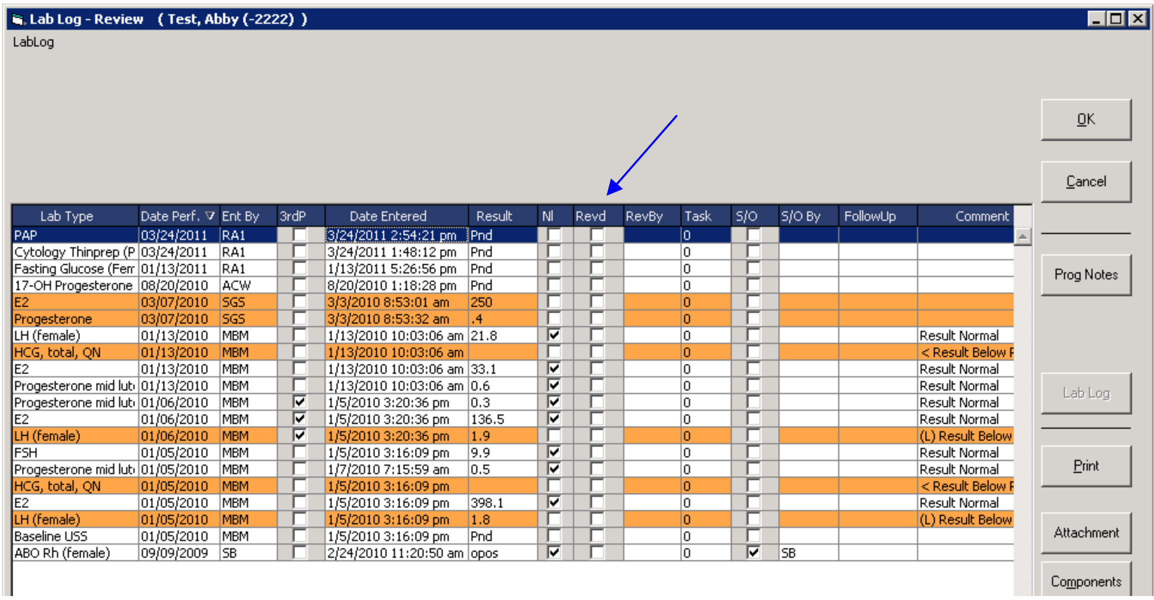
4 – click the Add button to add the lab and result to the Lab Log

5 – if entering another lab, repeat steps 1-4. If done, click the Close button

TIP: Lab results can also be entered directly through the corresponding lab order. Once the lab order has been marked as Drawn the Results button in the lab order becomes enabled – clicking this button displays a Results window. Results can be entered for each lab by double clicking on the specific lab or by clicking on the Edit button. From here, follow the same directions as if you were entering the results from the Lab Log

Lab Review

After a lab result has been signed off by a nurse, it can be marked as Reviewed by a physician. Clicking the Lab Review button will display a new window, Lab Log - Review. In this window a Revd checkbox appears in the column to the left of Rv - check this to mark the lab as reviewed. Simply click the X in the upper right corner to close Review mode and to return to the Lab Log. *Note that the Lab Log - Review window changes only very slightly from the Lab Log window – you can tell what window you are viewing by looking at the title bar (Lab Log vs Lab Log – Review), and the existence of the Revd column.*

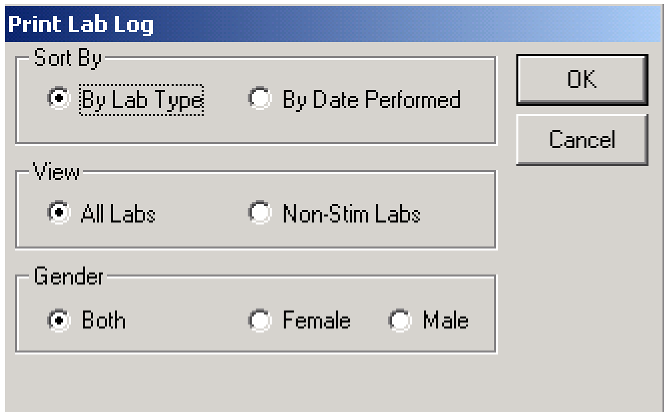


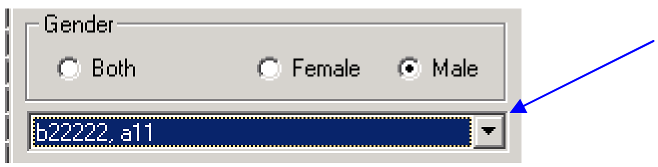
TIP: You'll notice a Prog Notes button in the Lab Log – Review window. Clicking this will open the Progress Note History window allowing you to not only read any existing progress notes, but also create a new note. This may be helpful when you want to document a phone call with a patient regarding a lab result you are reviewing, for example.

This Lab Review feature works well for reviewing labs for a single patient at a time. If you need to review labs for multiple patients at once, please see the Lab Log Review section towards the end of this document.

Print

When choosing to print the Lab Log, a window will appear allowing you to select print options: Sort By, View and Gender. Select an option for each group. If you select Male in the Gender group a dropdown will appear allowing you to select a partner name – this feature will refer to any partner links assigned to the labs and print only the appropriate labs.

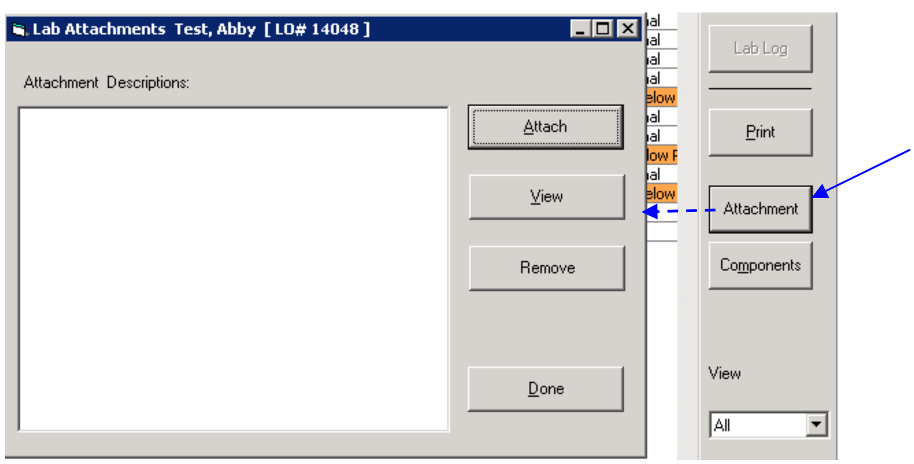




Attachment

To Attach a document to a lab item/result:

1 – select the desired lab and click Attachment. The Lab Attachments window will appear



2 – Click Attach

3 – From the Attach File browse window that appears, locate the attachment and click Open. The file will now be listed in the Lab Attachments window.

4 – Click Done

To View an attachment:

1 – Select the desired lab and click Attachment. The Lab Attachments window will appear.

2 – Select the attachment you want to view and click View

3 – Click Done

To Remove an attachment:

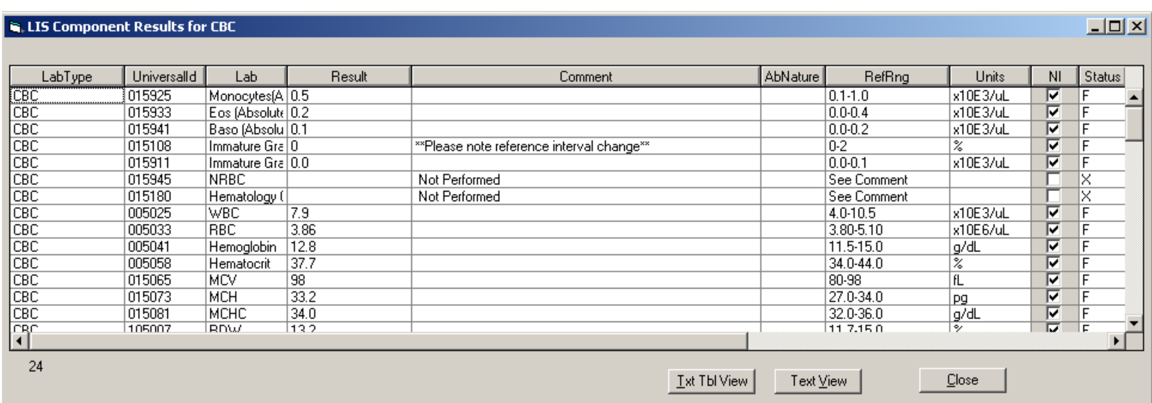
1 – Select the desired lab and click Attachment. The Lab Attachments window will appear.

2 – Select the attachment you want to remove and click Remove

3 – Click Done

Components

The Components button will display all component parts to a given *electronic* lab result, if the result is not comprised of a single value. (By electronic, we mean a result that has come over via a bridge from Lab Corp, Quest, etc.) For instance, an E2 will have a single value and won't have anything in its Components section, but a CBC has many values to its result. Clicking the Components button will display the LIS Component Results window – any components that exist will appear here.



LabType	UniversalId	Lab	Result	Comment	AbNature	RefRng	Units	NI	Status
CBC	015925	Monocytes(A	0.5			0.1-1.0	x10E3/uL	✓	F
CBC	015933	Eos (Absolut	0.2			0.0-0.4	x10E3/uL	✓	F
CBC	015941	Baso (Absolu	0.1			0.0-0.2	x10E3/uL	✓	F
CBC	015108	Immature Gra	0	**Please note reference interval change**		0-2	%	✓	F
CBC	015911	Immature Gra	0.0			0.0-0.1	x10E3/uL	✓	F
CBC	015945	NRBC		Not Performed		See Comment			X
CBC	015180	Hematology (		Not Performed		See Comment			X
CBC	005025	WBC	7.9			4.0-10.5	x10E3/uL	✓	F
CBC	005033	RBC	3.86			3.80-5.10	x10E6/uL	✓	F
CBC	005041	Hemoglobin	12.8			11.5-15.0	g/dL	✓	F
CBC	005058	Hematocrit	37.7			34.0-44.0	%	✓	F
CBC	015065	MCV	98			80-98	fL	✓	F
CBC	015073	MCH	33.2			27.0-34.0	pg	✓	F
CBC	015081	MCHC	34.0			32.0-36.0	g/dL	✓	F
CBC	105007	RDW	13.2			11.7-15.0	%	✓	F

The Txt Tbl View and Text View buttons simply display alternate views of the components list.

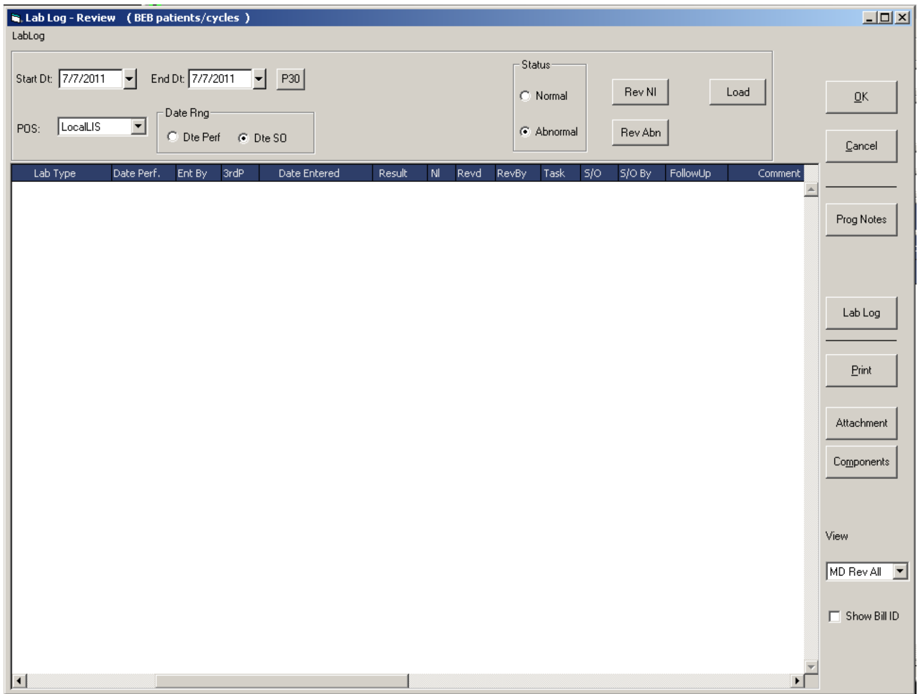
The **Show Bill ID** checkbox in the lower right of the Lab Log window will display an additional column in the Lab Log when checked – Bill ID. This column will display the SuperBillID number that contains the charge for the particular lab item. Note this only works when using the AutoGen feature of the SuperBill.

Lab Log Review

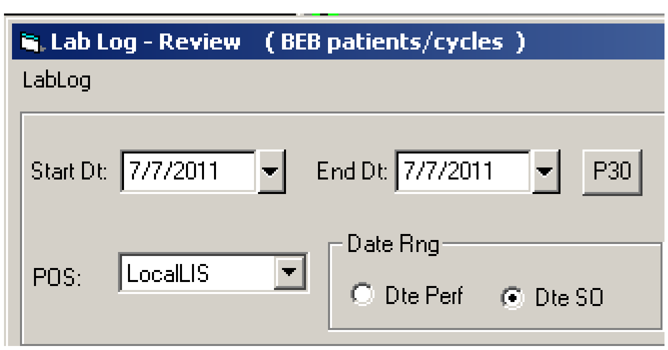
As mentioned earlier in this document, lab review is a feature that allows a physician to mark labs as Reviewed. In the Tools menu there is a Lab Log Review item that enables a physician to review all of his/her patients' labs.

To Review Labs:

1 – go to Tools – Lab Log Review



2 – when the Lab Log – Review window appears you will see filter options in the upper left of the window



Start Dt – enter the beginning date of the date range you want to view

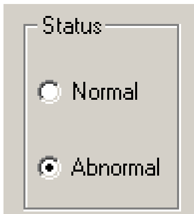
End Dt – enter the ending date of the date range you want to view

P30 – clicking this button will enter a date range of the past 30 days

POS – Point Of Service where lab order was sent and results were returned from (electronically)

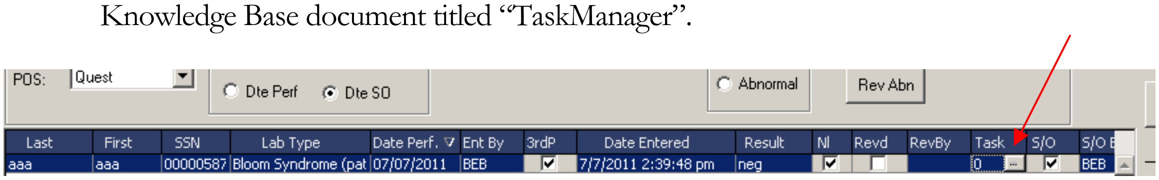
Date Rng options – you can choose to apply the selected date range to the Dte Perf (Date Performed) or Dte SO (Date Signed Off)

3 – from the result Status options, choose Normal or Abnormal to further filter your list



4 – click Load to apply the filters and display the patient list. *Note that patients are automatically filtered by* ***primary MD*** *(as indicated in the PROV field of Patient Details) – only patients for the logged in user/MD will appear.*

To enter a comment for a lab, double click on it to bring up the Lab Result window. You can also assign a task regarding the lab result by selecting the Task field and clicking the button that appears. For more information on tasks and Task Manager, see the Knowledge Base document titled "TaskManager".



Using the buttons along the right side of the Lab Log – Review window, you have access to the selected patient's progress notes and lab log, as well as the ability to print, include attachments and view components.

5 – the MD can review each lab individually by checking off Revd, or do a bulk/batch review. To do a bulk review for all displayed lab results, click Rev Nl (Review Normal) or Rev Abn (Review Abnormal) as appropriate.

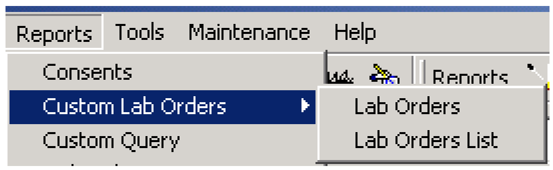
6 – click Yes to the prompt that appears, and enter your RESource password when prompted. Choose Yes to save changed. The Revd checkbox for each lab will now be checked and initials will appear in RevBy.

7 – click OK

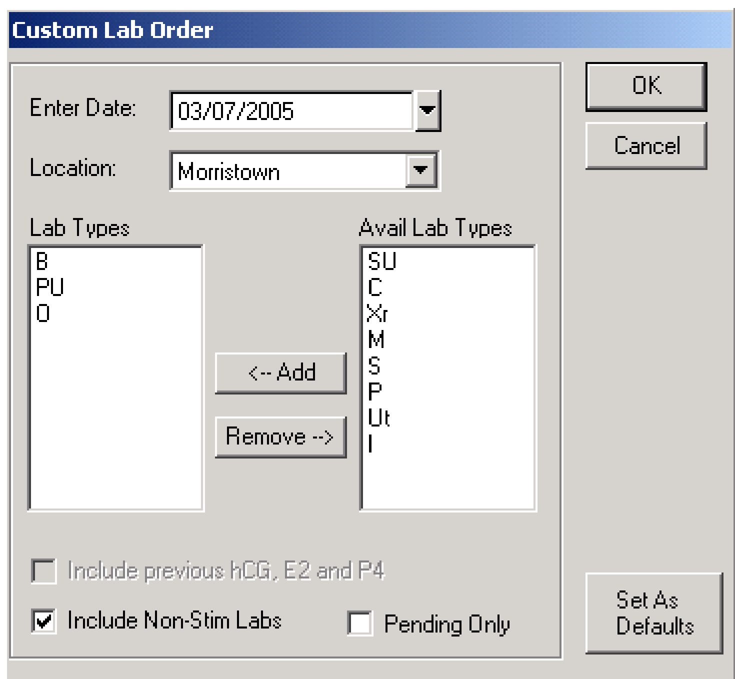
Lab Order Reports

Custom Lab Orders

Selecting Custom Lab Orders from the Reports menu allows you to select either Lab Orders or Lab Orders List. The Lab Orders option will enable you to print each individual lab order meeting the criteria entered, while the Lab Orders List will enable you to print a list of patients/orders meeting the criteria.



Upon selecting either option, a window will appear where the report criteria are defined. The criteria selected relates to specific lab order items in the stim sheets. The resultant printouts will represent all lab orders that meet the criteria entered.



To generate/print a Custom Lab Order report:

1 – select the desired stim date and stim location. Note there is an option for All Offices in the Location dropdown list.

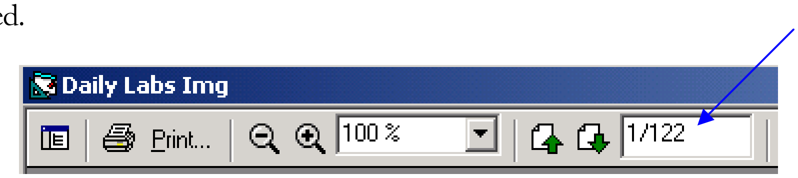
2 – from the Avail Lab Types box on the right, select the desired order types and click Add. Any order types listed in the Lab Types box on the left will be searched for. To remove a type from the Lab Types box, select it and click Remove.

Include previous hCG, E2 and P4 – this option is currently disabled

Include Non-Stim Labs – when checked, the resultant report will include all lab orders that meet the above criteria, regardless of whether or not the individual orders contain stim labs (E2, P, FSH, LH, bHCG). If not checked, only lab orders that contain at least one stim lab, in addition to the other criteria listed, will appear as a result.

Pending Only – when checked, the resultant report will return only lab orders where results are pending (in addition to the other criteria listed). If not checked, lab orders of all statuses will be included.

3 – click OK. If running Lab Orders, all lab orders meeting the criteria will load – you will know that they are done loading when the counter at the top of the window has stopped.



If running Lab Orders List, a list of patient names will load – you will know when the report is done loading when the counter has stopped. Click Print.

The lab types available in the Custom Lab Order report feature are abbreviations that are pre-assigned to each individual lab order item in RESource. These abbreviations will also appear in the Lab column of the stim sheet when an order exists.

B – Blood work (usually refers to female blood work)

PU – Pregnancy Ultrasound

O - Other

SU – Stim Ultrasound

C - Cultures

Xr – X-Ray

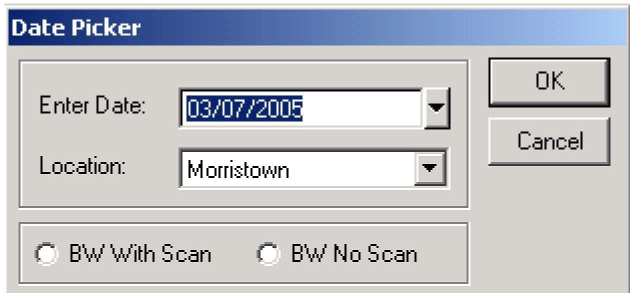
M – Male lab work (blood work and/or Andrology testing)

Lab Orders

Different from the Custom Lab Orders, the Lab Orders option prints all lab orders for a given date – this option is used every morning to print out the day's orders.

To print Lab Orders:

1 – select Lab Orders from the Reports menu and select a date and location from the Date Picker prompt that appears



BW With Scan – selecting this option will return lab orders where an ultrasound is also ordered for the given date

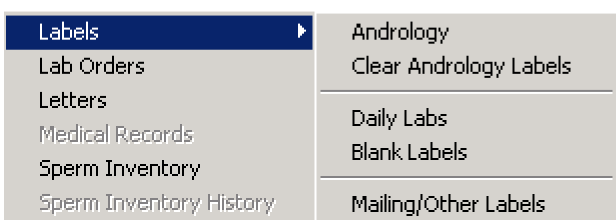
BW No Scan – selecting this option will return lab orders where no ultrasound has been ordered for the given date

Selecting neither of the above two options will return all patient lab orders regardless of ultrasound order status.

2 – click **OK.** All lab orders meeting the criteria selected will load – you will know that they are done loading when the counter at the top of the window has stopped.

Labels

In addition to the lab orders, labels can be generated for labs/blood work.



There are two options in the Report menu, under Labels, that can be used for blood work: **Daily Labs** and **Blank Labels**. The Daily Labs option prints labels for each patient with a lab order for the given date, while Blank Labels provide space to hand write additional labels as needed. The labels include the date, patient name, patient SSN, primary physician, date of birth and the date the lab was drawn.

Daily Labs

03/22/05
aaaa, bbbbbb T
SS#/MD: 111-00-0173 / MJS
DOB: 10/04/1961
Date Drawn: 03/22/2005

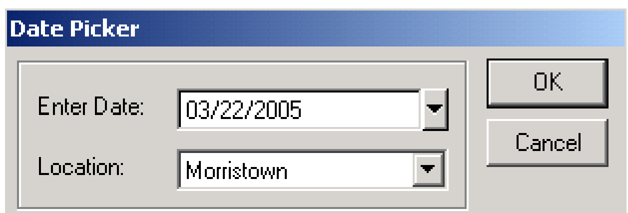
Blank Label

03/22/05
Last, First Name:
SS#/MD:
DOB:
Date Drawn:

To print Daily Labs labels:

1 – select Labels – Daily Labs from the Reports menu

2 – select the date and location from the date picker prompt that appears



3 – click OK. Three labels will generate for each patient. Click the Print button in the upper left corner of the window that appears.

To print Blank Labels, select Labels – Blank Labels from the Reports menu. One page of blank labels will appear – click the Print button in the upper left corner of the window.

There are also bar code labels that can be generated for patients with lab (blood work) orders. The bar codes are generated by RESource and can then be applied to the samples' tubes. Bar code labels are discussed in detail in the Knowledge Base article titled "Phlebotomy".