	DOCUMENT TYPE: ☒ Procedure	ORIGIN DATE IN TITLE 21 New
Wake Forest® Baptist Health		
CLIA Lab Director: Dr. Gregory Pomper	LAB DEPARTMENT: Central Processing Lab – Client Services	CONTACT: Central Processing Lab – Client Services

APPLICABLE LABORATORY(S)):
☒ North Carolina Baptist Hospital (NCBH)
☐ Lexington Medical Center (LMC)
☐ Davie Medical Center (DMC)
☐ Wilkes Medical Center (WMC)
☐ High Point Medical Center (HPMC)
☐ Westchester
☐ Clemmons

PROCEDURE STATEMENT

This procedure provides laboratory testing personnel with guidelines for order entry from a paper requisition when the CareEvolve system is out of service.

SCOPE

i.   Procedure Owner/Implementer: Client Services
ii. Procedure Prepared by: Central Processing Management
iii. Who Performs Procedure: Client Services and Central Processing Team Members

DEFINITIONS

A. Procedure: A process or method for accomplishing a specific task or objective.
B. WFBH Lab System: Wake Forest Baptist Lab System is a health system that includes Wake Forest Baptist Medical Center and all affiliated organizations including Wake Forest University Health Sciences (WFUHS), North Carolina Baptist Hospital (NCBH), Lexington Medical Center (LMC), Davie Medical Center (DMC), Wilkes Medical Center (WMC), High Point Medical Center (HPMC), Lab at Westchester and Lab at Clemmons.

POLICY GUIDELINES

A. Looking up patient in Requisition Entry

   1. Paper requisitions for CareEvolve orders (X accounts) are placed in the Client Services door during Client Services operating hours. After hours, Central Processing staff will follow this procedure.

   2. In Beaker, open the Requisition Entry activity.

3. Enter the Submitter (for example, XBRSA).

4. Look up the patient by name and date of birth.

5. If patient does not have an existing record under the Submitter account, proceed to Section B (using XCEDOWN submitter).

6. Enter the ordering provider.

7. Enter Bill To information if included on the requisition (patient bill or client bill)

8. Enter orders under Procedure

9. Click Create Specimens. Barcode labels will print.

10. Click CC Results button. In the CC Recipient field, type * (space bar), Enter. Type in the Name of the recipient (i.e. Brookridge) and their Fax number including area code in the appropriate fields. Click Accept.

11. Enter specimen Collect Date and Collect Time. Click Receive.

12. Click Accept at the top of the page. Client Services will place the labels in the bag with the correct specimens. Central Processing staff will label samples, receive tests, and place in the appropriate rack or bin.

13. Client Services will scan requisitions entered during CareEvolve downtime and email to the billing team at labbilling@wakehealth.edu. Billing team will send necessary information to McKesson to process.

B. **Workflow for Non-Existing Patient (no record exists in CareEvolve)**

1. Enter Submitter XCEDOWN in Requisition Entry

2. In the Patient field, enter the patient name (Last Name,First Name). Patient Lookup box opens.

3. Enter patient's DOB, SSN, and Sex. If SSN is not available, enter all zeros (000-00-0000) or click on magnifying glass and select "standard unknown SSN."

4. Click New.

5. Enter the ordering provider.

6. Enter Bill To information as listed on the requisition (patient bill or client bill).

7. Enter the orders under Procedure.

8. Click Create Specimens. Barcode labels will print.

9. Click CC Results button. In the CC Recipient field, type * (space bar), Enter. Type in the Name of the recipient (i.e. Brookridge) and their Fax number including area code in the appropriate fields. Click Accept.

10. Enter specimen Collect Date and Collect Time. Click Receive.

11. Click Accept at the top of the page. Client services will place the labels in the bag with the correct specimens. Central Processing staff will label samples, receive tests, and place in the appropriate rack or bin.

12. Client Services will scan requisitions entered during CareEvolve downtime and email to the billing team at labbilling@wakehealth.edu. Billing team will send necessary information to McKesson to process.

REFERENCES

None

RELATED PROCEDURES/POLICIES

None

ATTACHMENTS/LINKED DOCUMENTS

None

REVISION DATES: REVIEW CHANGE SUMMARY AS REPRESENTED IN TITLE 21.