Atrium Health Wake Forest Baptist	**DOCUMENT TYPE:** Procedure	**ORIGIN DATE** 3/25/2019
CLIA Lab Director: Dr. Gregory Pomper	**LAB DEPARTMENT:** Central Processing Lab	**CONTACT:** Central Processing Lab

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

PURPOSE

This purpose of this procedure is to provide laboratory personnel with guidelines for order entry from a paper requisition or verbal or telephone communication into the various laboratory information systems.

SCOPE

This procedure applies to Central Processing and Client Services 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.

SUPPLIES/MATERIALS

Appropriate personal protective equipment (PPE) must be worn when handling biohazardous specimens.

PROCEDURE GUIDELINES

A. Procedure

Requisition and Order Requirements

1. All specimens must be accompanied by an adequate requisition.

2. Requisitions, paper or electronic, must include the following:
    a. At least two unique patient identifiers (name, date of birth, medical record number)
    b. Patient's sex
    c. Name and address of the ordering physician or name and address of the referring laboratory
        i. Only legally authorized persons/providers may submit orders. Providers not in the LIS must provide documentation of their National Provider Identification (NPI) number. Follow Provider Not in System Reconciliation procedure when indicated.

3. Test orders must be clearly stated to allow proper ordering in the lab information system. Unclear orders must be clarified by the ordering provider before testing is performed. Document clarifying information by the ordering provider on the requisition, including the name of the person providing the information, date and time of communication, and your name.

4. If date and time of specimen collection are not provided, contact the collecting location or use the current date and time.

5. Requisitions should include relevant clinical information, as applicable.

6. All orders received via paper requisition or verbal or telephone communication must be entered into the appropriate lab information system for order tracking.

7. Verbal or telephone orders are rare, and management is notified if any verbal order is taken. Verbal or telephone orders must be followed by the receipt of written or electronic authorization within 30 days of the initial order.
    a. Orders entered into the LIS using the "verbal with read back" or "telephone with read back" order mode will submit an electronic authorization request to all providers within the health system.
    b. For verbal or telephone orders received from providers outside of the health system (i.e. Outreach):
        i. Request a written order to be submitted within 30 days from receipt of the initial verbal or telephone order
        ii. Scan the written order into the LIS upon receipt following the "Scanning a Requisition/Document into Requisition Entry in Beaker" section.

8. Verbal or telephone orders must be read back in their entirety to the requestor by the person receiving the order to ensure accuracy of transcription.

9. Verify at least two unique patient identifiers are on all specimens and the requisition per Patient ID and Identification of Blood, Body Fluids, and Tissue Samples procedure.

Registration by Client Services

1. If registration will be completed by Client Services:

    a. Complete the Registration Checklist
        i. Determine if the patient identifiers match on all specimens and the requisition. Check Yes or No on the checklist.

    b. Document any specimen or identification issues.
        i. These orders will be entered into the LIS and immediately canceled using the appropriate reason. Entry into the LIS will allow for documentation of specimen receipt and the reason the specimen was unacceptable.
        ii. Specimens with identification issues will not be ordered.

    c. Document the number of each tube type received.

    d. Document the time the specimens were received.
    e. Record your initials on the checklist. Staple the Registration Checklist to the requisition.

    f. Label the biohazard bag containing the specimens with the patient's last name. Place the labeled bag in the To Be Registered bin.

    g. Deliver the requisition with attached completed Registration Checklist to Client Services. Place in the bin on the Client Services door. Knock on the door to indicate a requisition was delivered.

    h. Upon completion of the registration, Client Services will deliver the labels to Central Processing, obtain the labeled bag containing the specimens, and place the labels in the outside pocket of the bag. They will place the bag into the Stat or Routine accessioning bin for receipt and labeling by Central Processing.

Care Evolve Registration and Order Entry (X Locations)

1. Using a web browser (recommend Chrome), navigate to the Care Evolve login page:

    https://wfubmc.careevolve.com/doctors/framepage.asp

2. Log in to Care Evolve:

    a. Username: same as your Medical Center ID (computer login ID)
    b. Password: Initially set as PASSWORD1. You will be prompted to change at your initial login.
        i. Password will expire if not periodically logged in.
        ii. Passwords can be updated by Client Services or Path Tech (pathtech@wakehealth.edu).
    c. Location: CS (client services)

3. Set the ordering location:

a. Use the Common Accounts dropdown box and type the location's name; or
b. Enter an account using the X location code (for example, XAFAM)

4. Once the ordering location is selected, the main screen for the selected location will appear.

5. Enter the patient's last name in the Search box and press Enter. All patients with that last name under that ordering location will display.

6. If the desired patient is not listed, create a new patient:

a. Hover over the Patients tab. Click Add Patient.
b. On the Add Patient screen, enter the available information from the requisition. Fields in red are required.
c. Correctly complete the following:
   i. Demographics section
   ii. Guarantor
   iii. Insurance – some patients will have a primary and secondary insurance. Input the primary insurance first (Insurance-1) including the policy ID, then input the secondary insurance.
d. Click Save & Place Order. If any required information was not entered, the user will be notified in red. Input the missing information to proceed with registration.
e. Select Order Type "Draw Now"
f. Select Bill Type:
   i. Client
   ii. Patient – Selected on requisition and no insurance information has been provided.
   iii. Third Party – Patients with insurance information provided, including insurance company and policy ID.
   iv. If bill type is not indicated: During regular business hours of the client, contact client to determine correct bill type and obtain needed information. After client business hours, select Client and place all paperwork with a note to follow up in the Manual Requisitions folder in Central Processing.
g. Select the Ordering Provider:
   i. Type in the provider's last name and select provider if available.
   ii. If provider is not available in the drop down list, choose "Outreach, Not on Staff."
h. When you have all green checks, click Next.
i. Search for orders in the "Selected Tests" box using the provided test name or Lab Number indicated on the requisition.
j. When all the tests are listed, verify the ordered tests have a check in their box. Click Next.
k. Enter the Collection Date and Time. Enter Call To information in the Report Comments box, if applicable.
l. Click Complete.
m. If there is Call To information, print the Care Evolve requisition and bring to testing section, as applicable.

n. Print the labels from Beaker:

   i. Log in to Beaker. Open Specimen Inquiry by Patient.
   ii. Enter the patient's name in the Name/MRN box.
   iii. Enter the X location code in the Submitter box.
   iv. Select Find Patient
   v. Select the requisition hyperlink (for example, RQ12345)
   vi. Select Labels. Click Select All to highlight all tests.
   vii. Select desired printer. Click Print Labels. Repeat for all requisitions entered.

o. Label samples, ensuring all patient identifiers match. Receive samples in Beaker following Specimen Receipt and Tracking procedure.

Requisition Entry Order Entry

1. Refer to Beaker Submitter Testing procedure

One-Click Registration and Order Entry

1. Orders that must be entered using One-Click registration may be submitted on a variety of requisition types, including but not limited to:

   a. Wake Forest Baptist Health POPL requisition
   b. Prescription paper including the name and address of the ordering provider
   c. Printed orders from an electronic medical record that include the name and location of the ordering provider
   d. Piedmont Dialysis requisition
   e. North Side Dialysis requisition
   f. Helms Home Care requisition
   g. Advance Home Care requisition
   h. Blood Bank requisitions
   i. High Point Medical Center bone marrow orders

2. Log in to Epic using your medical center ID and password.

3. Click on Patient Station. Enter the patient's MRN or the patient's demographics (Last Name, First Name; Sex; Date of Birth). Click Find Patient or press Enter.

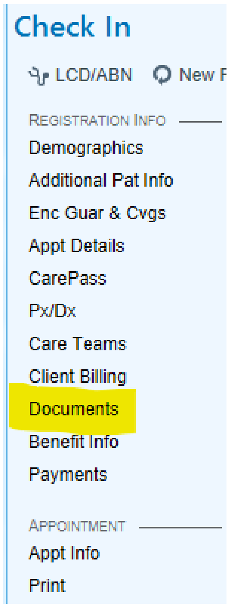
4. Verify if the patient is already in Beaker by confirming the patient's demographics.

   a. If the patient is not in Beaker, enter all of the available demographics. If SSN is not available, enter all zeros (000-00-0000) or click on magnifying glass and select "Standard Unknown SSN." Click Accept. Click New to create a patient medical record.

5. Click on the One Click lightning bolt icon in the Patient Station toolbar. Select the first available appointment. Click Schedule.

a. To create an appointment for a previous date, follow Job Aide Creating a Back-Dated Beaker One Click Appointment

6. Click the Documents section on the Registration window.

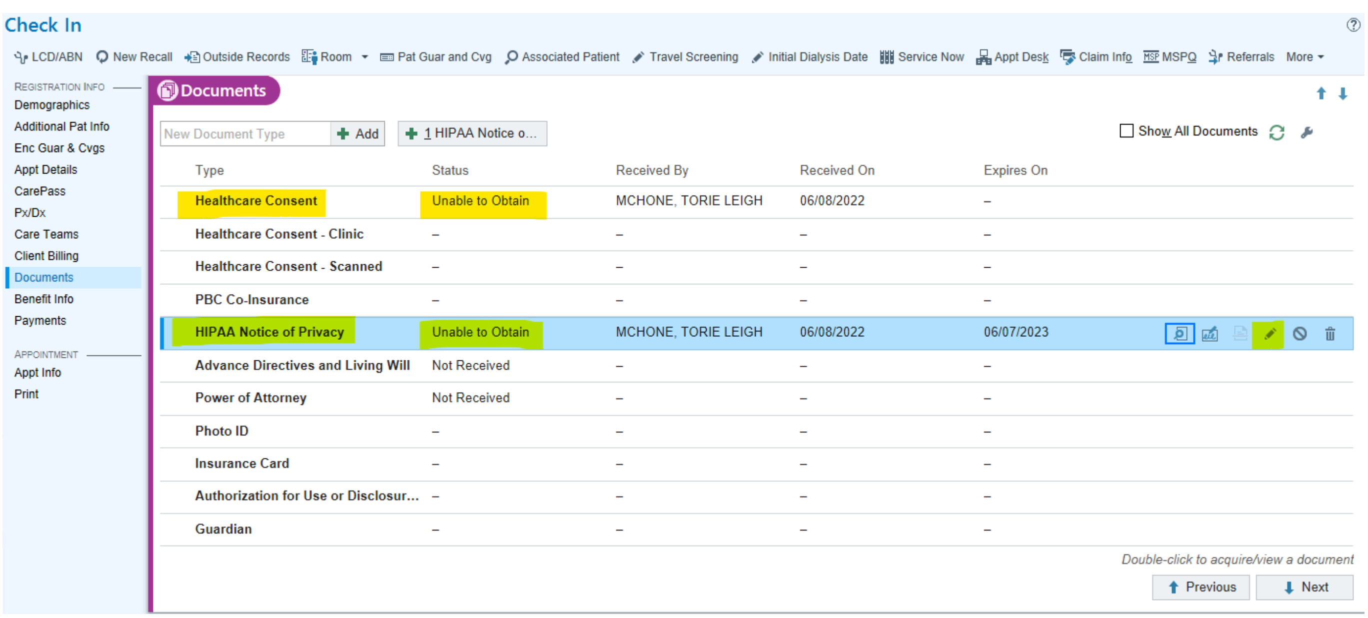


a. Two documents need to be updated in this section.

i. Healthcare Consent

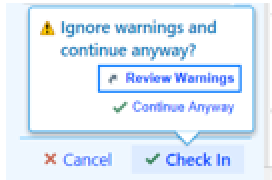
ii. HIPAA Notice of Privacy

7. Look at the Status column to see if these documents have been updated. Hover over the document that needs to be updated. Click the pencil icon on the right of the window.



8. Record the status of the document as Unable to Obtain. Click Accept.

9. Click Check In and Continue Anyway in the lower right corner of the Check-In window.



10. Under the Encounter list, select the appointment for the correct date and Department MC SB M BKR CLINICAL CORE LABS

11. Click Open Chart

12. Click Add Order at bottom left of Order Inquiry screen.

13. Type in the test name or lab code (for example, LAB1234). Click Enter. If the test does not appear, click the Database tab in the Order Search window. Select the test name and click Accept. Repeat for any additional tests to be ordered.

14. Verify that all tests on the requisition match the tests ordered in Beaker.

15. Click Add Dx box at the bottom left of the screen. Enter the diagnosis code listed on the requisition. If multiple diagnosis codes are listed, enter all diagnosis codes provided.

    a. If no diagnosis code is provided, enter Z00.00 – Routine general medical examination at a health care facility.
    b. Note on the requisition that diagnosis Z00.00 was entered.
    c. Place completed requisition with note in Manual Requisitions folder for Client Services follow-up.
    d. Client Services will contact the ordering provider for the appropriate diagnosis code and make changes, as applicable.

16. Click Sign Orders at bottom right of screen. Associate diagnosis code(s) by clicking “All” in the Associate Diagnosis popup window.

17. Enter the provider’s last name in the Authorizing Providers field and select the correct provider.

    a. If the provider is not listed in Beaker, use “Prov Not in System” and note this on the requisition. File the requisition in the Manual Requisitions folder for Client Services follow-up.

18. Collect specimens according to Job Aide, Collecting Orders in Beaker.

<u>Completing a Full Registration from a One-Click Registration</u>

1. Log in to Epic using your medical center ID and password

2. Select "Patient Station"

3. Enter the patient's Medical Record Number (MRN) or the patient's demographics (Last Name, First Name; Sex; Date of Birth). Click Find Patient or press Enter.

4. Highlight the correct patient and verify demographics

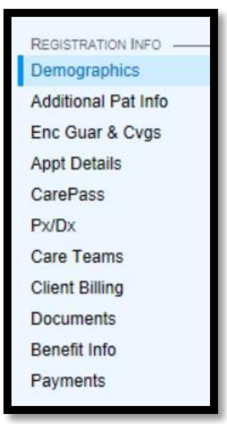
5. Click "Select"

6. Under the Encounter list, select the appointment for the correct date and Unit/Department

a. Winston Campus Lab is **MC SB M BKR CLINICAL CORE LABS**
b. High Point Laboratory is **HPMC 02 LABORATORY**

7. Double click on the appropriate appointment to open the registration workflow.

8. On the left registration menu bar, begin at "Demographics" and complete all pages by clicking "Next" at the bottom of each screen



a. Demographics

1. Verify information is correct. Make any necessary changes.

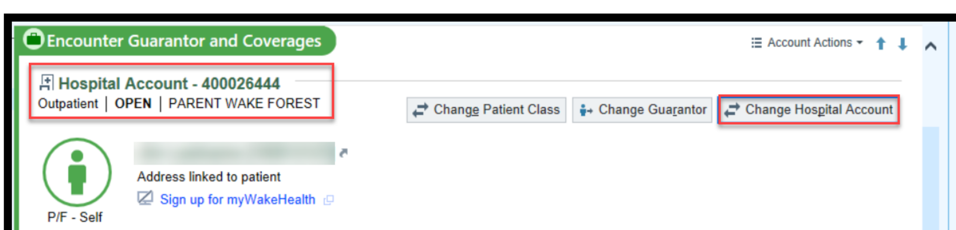
b. Additional Pat Info

1. Verify information is correct. Make any necessary changes.

c. Enc Guar & Cvgs

1. Hospital Account:

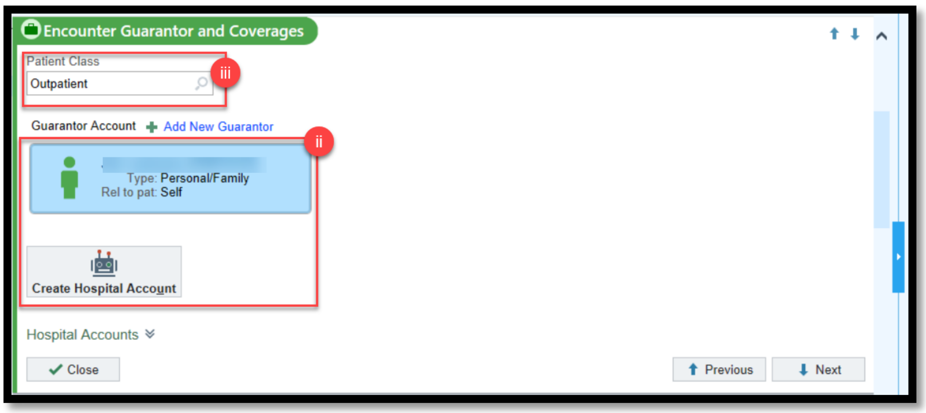
i. If a Hospital Account does appear for the visit, verify that the selected account is correct for the visit date.
- If the correct date does not appear, click "Change Hospital Account."



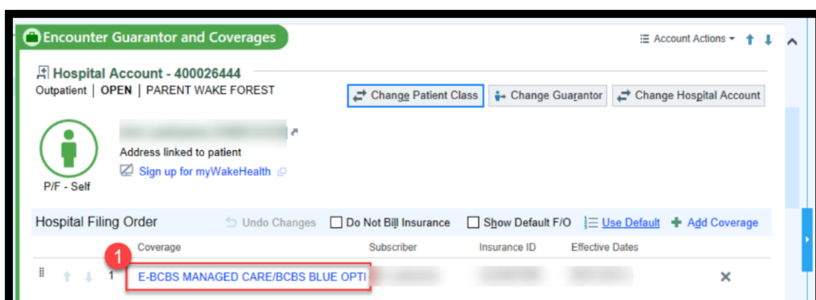
- Select the appropriate Guarantor Account and click “Create Hospital Account.”

ii. If a Hospital Account does not appear for the visit, select the appropriate Guarantor account for the visit and click “Create Hospital Account.”

iii. Verify the Patient class field is “Outpatient.”



2. Coverage(s)
   i. Verify the information shown under Coverage matches the information submitted on the requisition or insurance document.
      - To view insurance details click the hyperlink with the coverage name.



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I open the Insurance Activity where changes/edits can be made to a patient’s insurance information.

- Users can also check Response History from here.
- When finished, click Close in the top left of the activity.

ii. If the information is incorrect:

- Click the X next to the information to remove it from the Hospital Account.
- This will place the insurance in a newly created area titled “Unused Coverages.”

- If the insurance was removed in error, click the green plus sign next to the insurance to add it back to the Hospital Account.

iii. Click Add Coverage to start the insurance wizard.
   - If running RTE, the response will appear at the top of the Patient Checklist under a section titled “Notifications” – click the hyperlink to view the eligibility response and create the coverage.

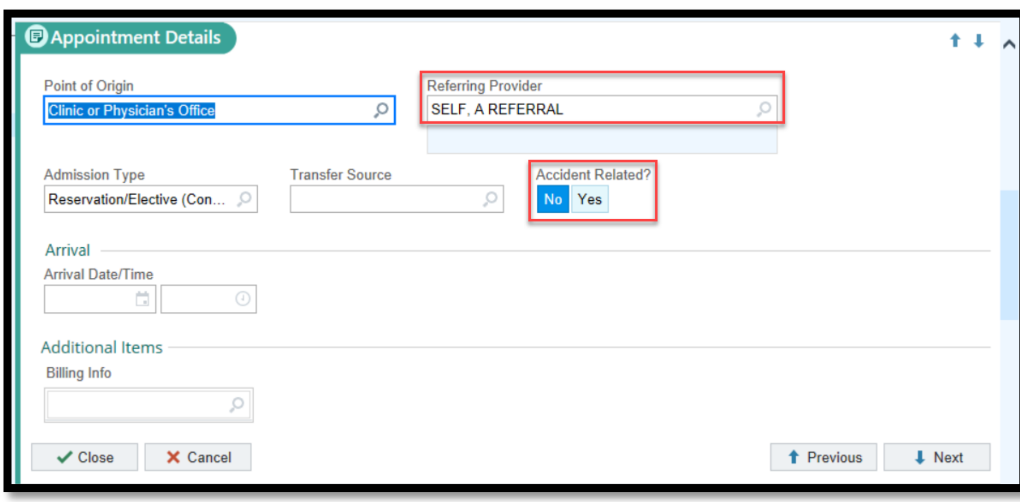
iv. If patient does not have insurance, check the “Self-pay” box.

d. Appointment Details

1. If the Referring Provider field has a red stop sign, enter the ordering physician.

2. If the physician is not in the system, follow Provider Not in System Reconciliation procedure.

3. Under Accident Related? field, select “No.”

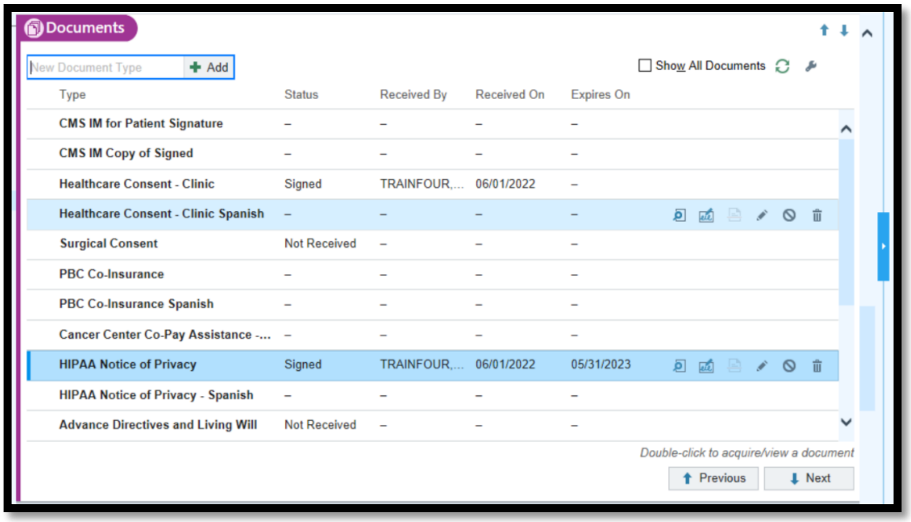


e. CarePass, Px/Dx, Care Teams, Client Billing

1. No information is entered on these pages

f. Documents

1. Check that Healthcare Consent and HIPAA Notice of Privacy have status of Unable to Obtain. Update status as needed.



g. Checklist

i. All items should have a green circle with a white check mark, some may include a yellow triangle next to an item listed in that section of the checklist.

ii. If items have an empty circle next to the section with a red stop sign

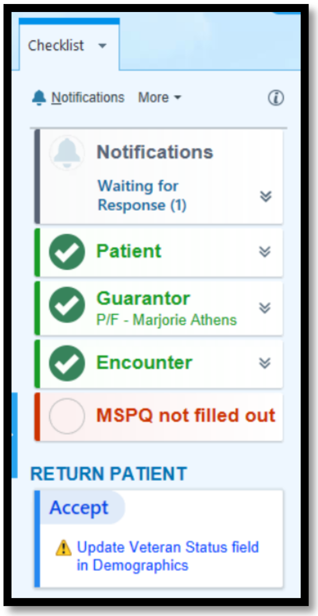
1. Click on the item to run the check manually to determine what further investigation is needed
2. Registration must be completed within 3 working days

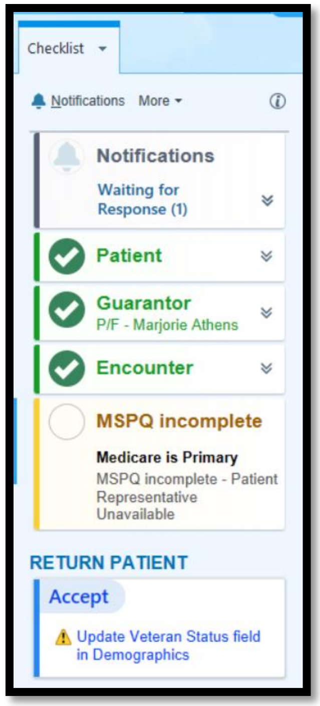
iii. There may be an additional section at the bottom of the checklist. This section is typically titled based on the type of patient you are registering (New patient or Return patient).

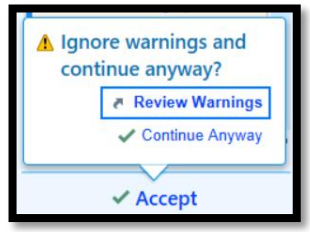
1. Complete any required fields in this section prior to completing registration.
2. Complete any requested fields in this section as applicable.

iv. If "MSPQ" has an empty circle and/or says MSPQ not filled out, Complete MSPQ

1. Click on MSPQ section – this acts as a hyperlink that will open MSPQ.
2. Click "Finish"
3. Use the magnifying glass in the dialogue box to view selections
4. Select "Patient Representative Unavailable"
5. Click "Leave Incomplete and Close"
6. Click "Accept" then "Continue Anyway" to finish registration







Add Faxing Information in Beaker

1. Verify if a fax request for results was indicated on the requisition
2. If a fax request was submitted
    a. Log in to Epic using your medical center ID and password
    b. Select Specimen Inquiry (by Patient)
    c. Enter the patient's Medical Record Number (MRN) or patient demographics as applicable (Name, Sex, Date of Birth)
    d. Click "Find Patient" or press Enter
    e. Select the correct patient and verify correct demographics
    f. Click "Accept"
    g. Click on the specimen or requisition hyperlink for all orders to be faxed
        i. In Specimen Inquiry
            1. Scroll down to CC List
            2. Click on the Modify hyperlink
               OR
            3. Select "Specimen Update" from the menu bar
            4. Click on CC Results. CC Results may be on your menu bar or in the (…) dropdown menu
        ii. In Requisition Entry
            1. Click on the CC Results button on the Specimen menu bar.
    h. Click on the Free Text Recipient button
    i. Type the recipient's name in the Name field
    j. Click in the Fax number field

k. Enter the 10-digit fax number
l. Click “Accept”

Scanning a Requisition/Document into Media Manager in Beaker

1. Open the Media Manager activity
   a. Epic > Patient Care > Media Manager

2. The Patient Lookup Screen will open
   a. Enter the patient’s Medical Record Number (MRN)
      OR
   b. Enter the patient’s demographics, as applicable
      i. Last Name, First Name
      ii. Sex
      iii. Date of birth
   c. Click “Find Patient” or press Enter
   d. Select the correct patient and verify their demographics
   e. Click “Select”

3. In the Media Manager module
   a. Click on the drop down arrow next to “Patient”
   b. Scroll and select “Choose an Encounter”
   c. Select the encounter/visit the document(s) will be attached to
   d. Place the document(s) face down in the scanner
   e. Click “Scan”
   f. Click on the drop down arrow for Scan Source
   g. Select “Paper Stream”
   h. Click “Start Scanning”
   i. When the picture is displayed
      i. Confirm patient identification on scanned items with patient’s chart
      ii. Click on the drop down arrow for Document Type
      iii. Select “Physician Orders” or “ABN” based on the document scanned
      iv. Click on the drop down arrow for Document Description
      v. Enter “Doctors Orders” or “ABN”
      vi. Click “Index”
   j. If information is incorrect or missing
      i. Click the “Trash can” icon to discard
      ii. Begin scanning process again, as applicable
   k. Click “Exit Scan Server”

Scanning a Requisition/Document into Requisition Entry in Beaker

Scanning into Requisition Entry will electronically store the document(s) as an image attached to the specific electronic requisition number for access via the Requisition Inquiry activity

1. Open Requisition Entry for the orders associated with the paper requisition/document

2. Click on the “Scan” icon in the Requisition Entry menu bar

3. Click on “Select Scanner”

4. Choose your designated scanner

5. Place the document(s) face down in the scanner

6. Click “Acquire” to scan the document(s)

7. In the Description field, enter a title or description for the document

    a. Physician Order
    b. Add-on
    c. Change of Demographics
    d. Call Back Request
    e. ABN

8. When finished, click “Save doc”

LITERATURE REFERENCES

None

RELATED PROCEDURES/POLICIES IN NAVEX

None

ATTACHMENTS/LINKED DOCUMENTS IN TITLE 21

Patient ID and Identification of Blood, Body Fluids, and Tissue Samples

Provider Not in System Reconciliation

Specimen Receipt and Tracking

Beaker Submitter Testing

Vista Clinical Diagnostics Requisition

POPL Requisition

Registration Checklist

Creating a Back-dated Beaker One Click Appointment

Collecting Orders in Beaker

Registration Types

Provider Not in Care Evolve

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