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.
C. LIS: Laboratory Information System

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 or in the LIS, 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. Ring the doorbell 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.

Requisition Entry Order Entry

1. When specimens arrive in the lab from non-Atrium Health Wake Forest clients, orders must be entered using Requisition Entry. Clients send paper orders with specimens already collected. Lab user will manually have to place an order using Requisition Entry.

2. Refer to Beaker Submitter Testing procedure

One-Click Registration and Order Entry

1. Orders that must be entered using One-Click registration include Innovation Healthcare requisitions (orders requested by Wake providers) and other Atrium

Health Wake Forest affiliate locations. Patients with standing orders collected at dialysis locations also require one-click registration to release existing 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.

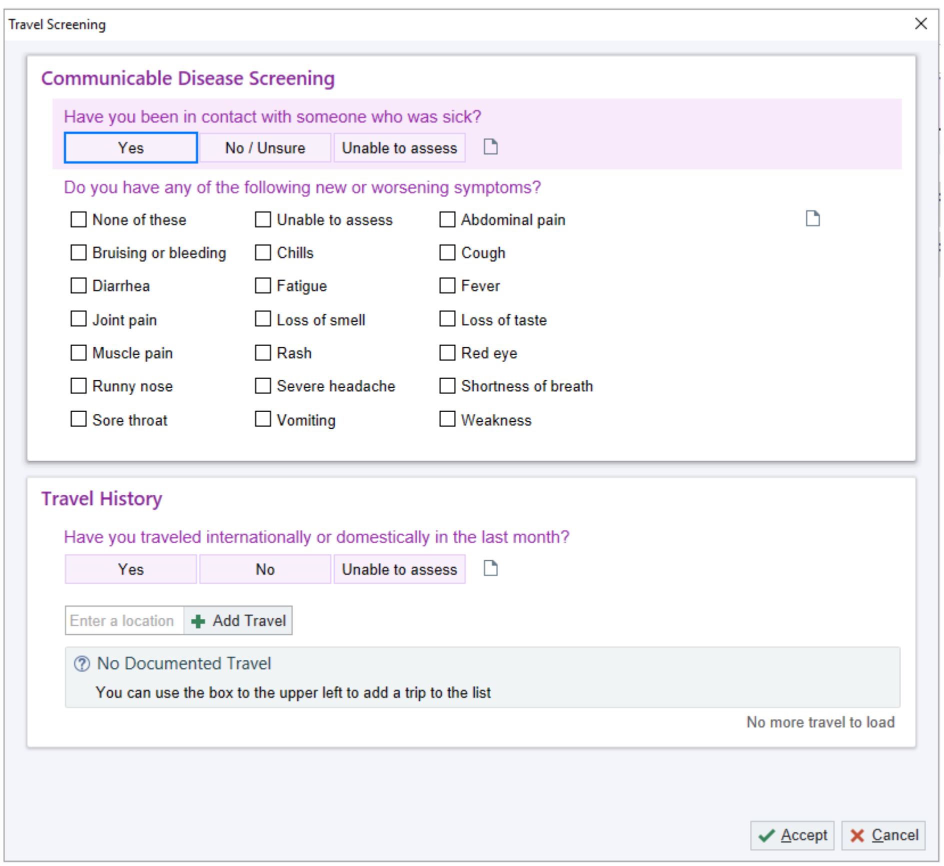
4. Verify if the patient is already in Beaker by confirming the patient's demographics.

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.

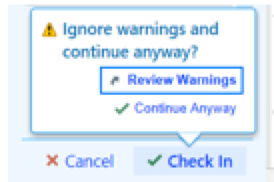
5. Click on the One Click lightning bolt icon in the Patient Station toolbar. Click the WFMC CLIN CORE LAB SPCIMEN DROP OFF hyperlink. Select the first available appointment. Click Schedule.

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

6. Fill out the Travel Screening form if it pops up and click Accept.



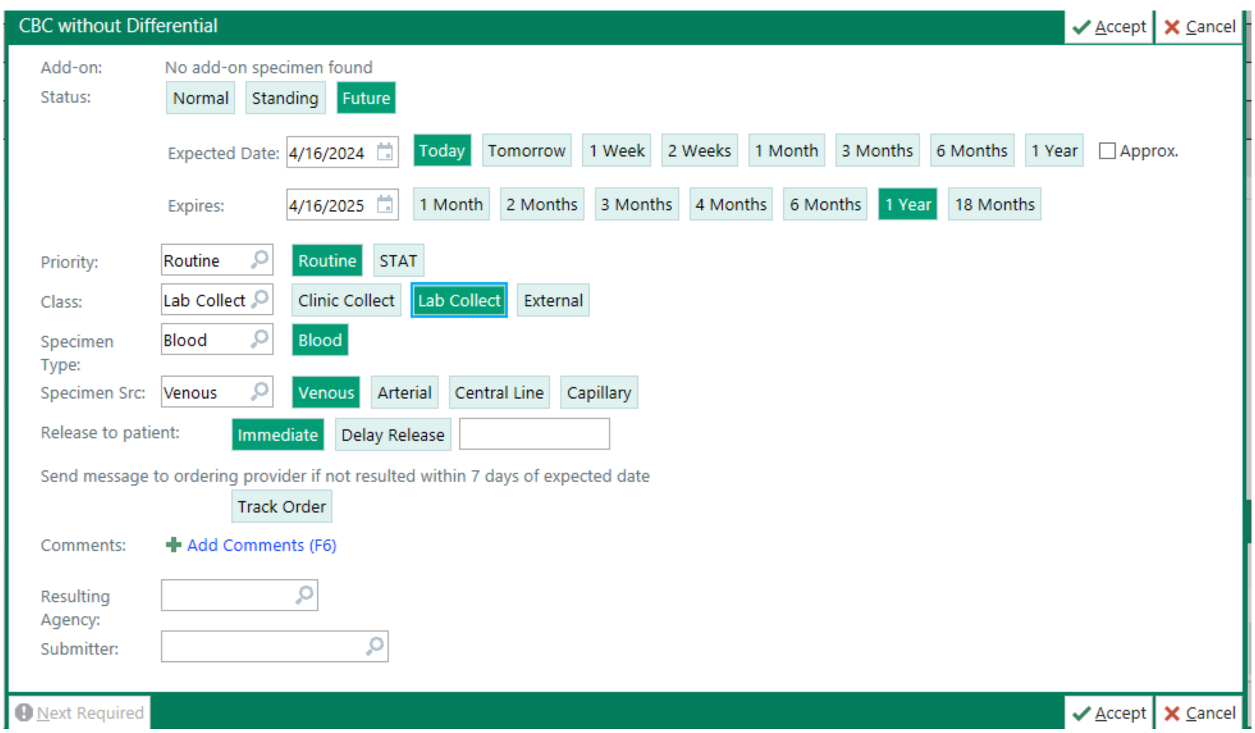
7. Click Check In and Continue Anyway in the lower right corner of the Check-In window.



6. Under the Encounter list, double click the appointment for the correct date and Department WFMC CLIN CORE LAB

7. In Order Inquiry tab, you should find orders that need to be collected.

8. You can add orders if needed by clicking Add Order at the bottom of the Order Inquiry screen. Select appropriate order and click Accept. Verify that all tests on the requisition match the tests ordered in Beaker. In the Order composer, click Today for expected date and Lab Collect as class. Click Accept. Click Sign Orders at the bottom right and assign a diagnosis. Select Order mode. Enter Ordering and Authorizing providers and click Accept.



9. In Order Inquiry, select tests ordered. Click Collect Specimens. Print Labels and enter collection information. Click Receive.

Add Faxing Information in Beaker

1. Verify if a fax request for results was indicated on the requisition

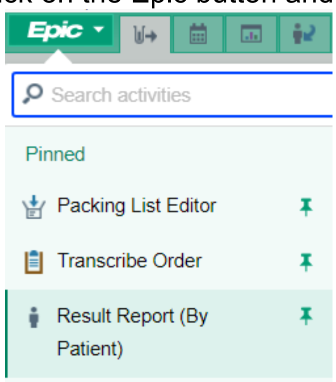
2. If a fax request was submitted

3. For Requisition Entry orders:

   a. In Requisition Entry
      i. Click on the CC Results button on the Specimen menu bar.
      ii. Click on the Free Text Recipient button
      iii. Type the recipient's name in the Name field
      iv. Click in the Fax number field
      v. Enter the 10-digit fax number
      vi. Click Accept

4. For any type of orders you can also use Result Report by patient to fax results:

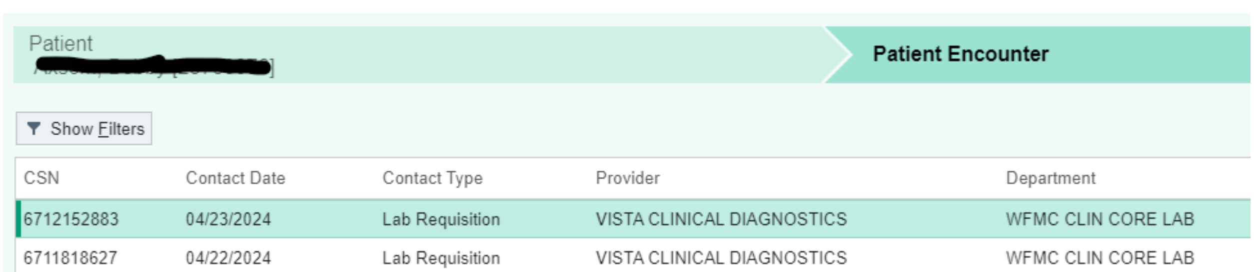
   a. Click on the Epic button and search for "Result Report (by patient)



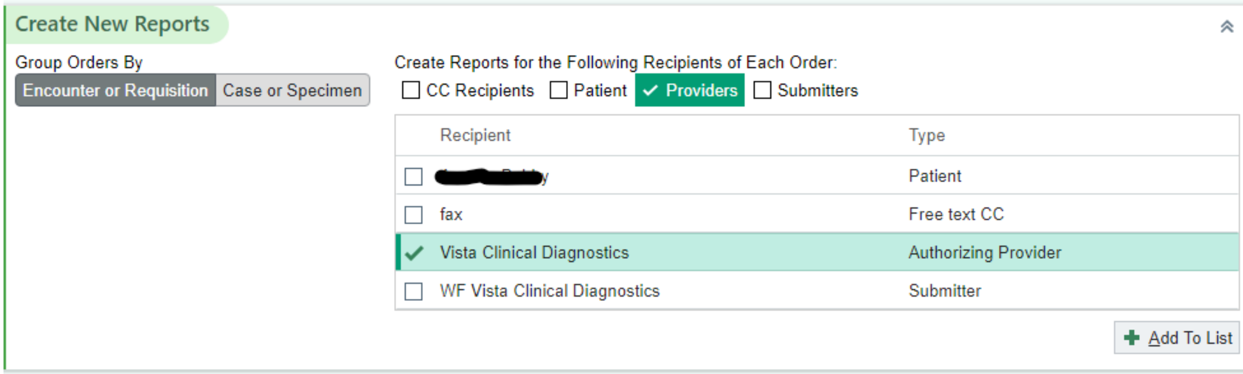
   b. Search for patient by MRN or Name and DOB. Select correct patient and click Accept.

   c. Choose correct encounter and click Accept.

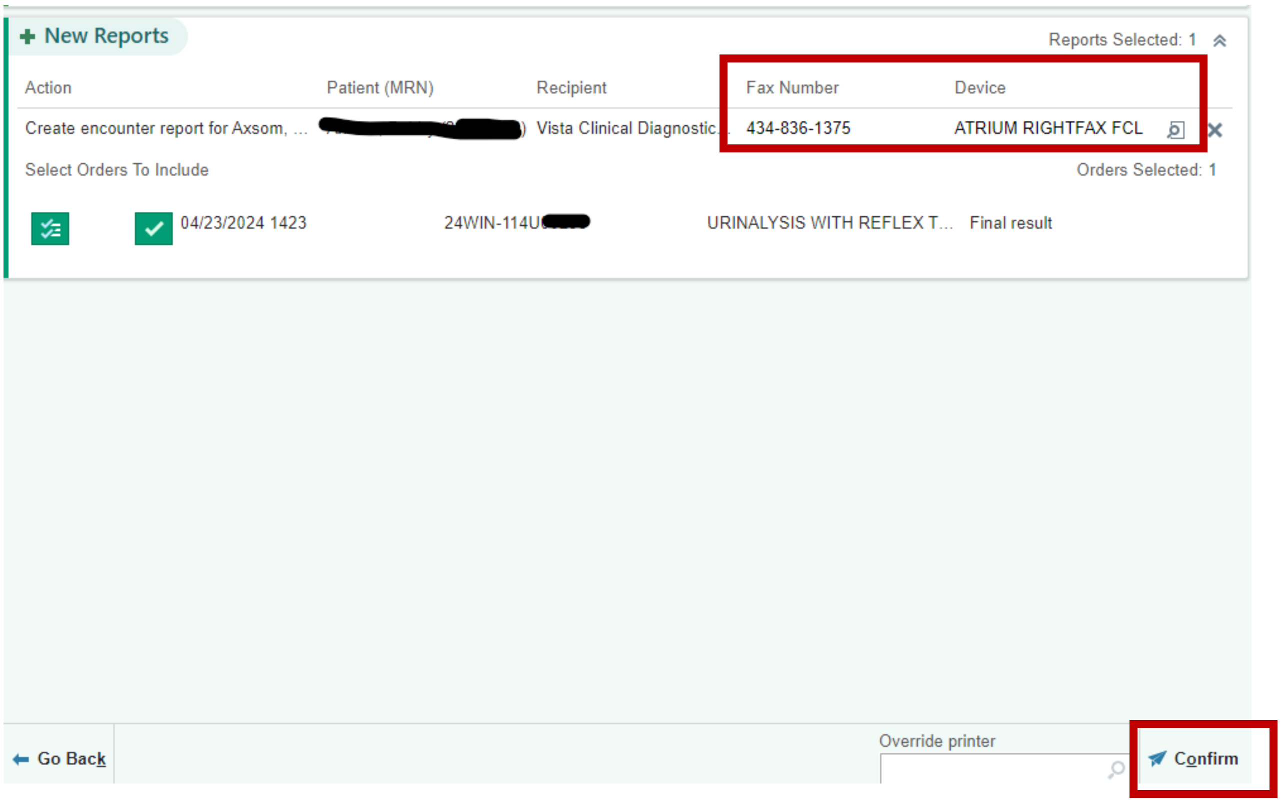
Patient Encounter Selection



d. Check next to the provider or requesting location and click Add to List



e. Add fax number and choose Atrium Rightfax FCL for device, then click Confirm.



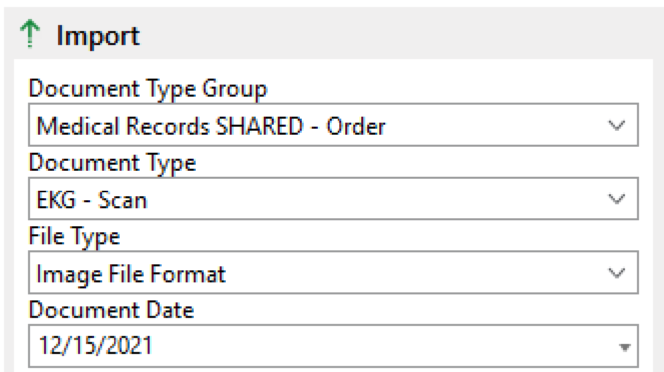
Scanning a Requisition/Document into Epic Media from OnBase

1. Select OnBase-Okta icon in the Wake Citrix Menu. Enter your username in the Advocate Health sign in screen.

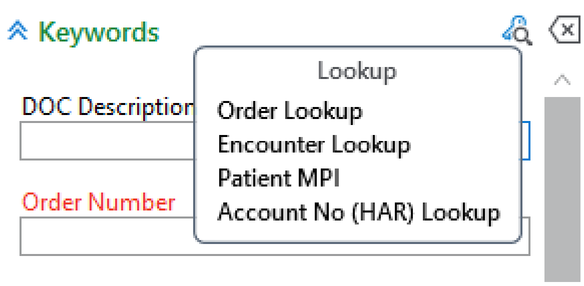
2. You will receive a second log in screen. Enter your Wake email address and password.

3. Place document in scanner head down, face down.

4. In OnBase, navigate to the Home tab.
   a. Click on the Import icon.
   b. Select the Acquire icon.
   c. Select device from pop up and click OK. Should be the “TWAIN” option.
   d. Select the paper source (single sided or double sided) and click Scan.
   e. Select the appropriate Document Type Group, Document Type, and enter the correct Document Date.



   f. Use the key with magnifying glass icon to Link the Document to Epic. Search by the level that matches the Document Type Group: Patient, Encounter, and/or Order so all red required fields are complete. Do not manually fill out the fields.



   g. Complete the DOC Descriptions field with standard What, Where, Who information.
   h. Once all of the appropriate information has been entered, click the Import button to upload the document to Epic.
   i.

Scanning a Requisition/Document into Requisition Entry

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

Registration Checklist

Creating a Back-dated Beaker One Click Appointment

Collecting Orders in Beaker

Registration Types

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