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| **Order Receipt/Modify (ORM)** | | | | | | |
| **Purpose** | This procedure provides instructions for using Order Receipt/Modify (GUI ORM) in Sunquest for receipt of specimens, modification, rescheduling and crediting of orders. | | | | | |
| **Policy Statements** | * This procedure applies to all laboratory staff | | | | | |
| Follow the activities in the table below to RECEIVE, MODIFY, RESCHEDULE OR CREDIT ORDERS IN GUI ORM. | | | | | |
| **Procedure** | **Step** | **Action** | | | | **Related Document** |
|  | **1** | **Logging into Order/Receipt Modify (GUI ORM)** | | | | |
|  |  | A. Log into the Sunquest Gateway by clicking on the **Sunquest GUI** icon on your desktop indicated by the symbol below.  C:\Users\CE001573\Desktop\2017-06-29_10-28-52.png | | | |  |
|  |  | B. The Laboratory Logon Screen will open, Select work area:  Should reflect **MIN**. Click **OK**. | | | |  |
|  |  | C. The SQ Main Logon page will open | | | |  |
|  |  | D. Enter your credentials (User ID: **Password, Lab Location**) and click the **OK** button. | | | |  |
|  |  | E. The Main SQ GUI Menu Selection Screen will open, select **General Laboratory.**  C:\Users\CE001573\AppData\Local\Temp\SNAGHTML6d6c110.PNG | | | |  |
|  |  | F. Select the **Orders** option that appears in the upper left hand corner of the screen.  C:\Users\CE001573\Desktop\2017-06-29_10-59-01.png | | | |  |
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|  |  | G. Then select **Order Receipt/Modify (ORM)** from the drop down list. | | | |  |
|  | **2** | **RECEIVING LAB SPECIMENS** | | | | |
|  |  | A. Once you are in ORM to receive orders, the following window will open. The default for the search screen is Patient ID (Patient Medical Record Number, MRN): | | | |  |
|  |  | B. Look for all active orders for the Patient ID/MRN or Select Accession number from the drop down, if appropriate. The Collection Manager/Clinical Collect bar code represents the Accession number. The Cerner labels represent the Patient ID/MRN. **You can scan these fields from bar codes attached to the specimen labels OR type directly into the field.** Yellow fields in these screens are **MANDATORY data fields**. One of the “feet” for lab labels has the MRN on a barcode. IF you select Accession Number, Order Status Options will not display and will bring you directly to the Order Receipt/Modify window. | | | |  |
|  |  | C. Once you click **Get Patient** (or **ENTER**), you will have an option to pick items under the Order Status selection box as seen above. Look for **Unreceived Orders** and **both Restricted and Unrestricted orders.** Then **ENTER** and **Display Orders** will activate and your unreceived orders will appear on the next screen. The line highlighted in ORANGE below is currently selected and information for F744 appears in the General Information Window. There will be a list of all the containers required (CIDs) for this order. | | | |  |
|  |  | D. Click into the **Collection Date** cell and **ENTER/TAB** through each of the **yellow fields**. The correct **Collect date/time** (if collected in Collection Manager/Clinical Collect) will automatically drop into the fields. If the specimen **was not** collected in Clinical Collect, you will need to **manually enter** the information hand written on the label or form submitted with the sample. The **Receipt Date/Time** will drop in as you **ENTER/TAB** through the fields. NOTE: If there is a Modifier present under the Order code box, follow instructions in #13.  If the sample was collected in Clinical Collect or Collection Manager, the phlebotomist code and order workload code will be populated. These are mandatory fields, if it is a floor collected sample and they did not use clinical collect, enter your tech code as the phlebotomist and RN as the workload  C:\Users\CE001573\Desktop\2017-06-29_11-57-28.png | | | |  |
|  |  | E. When you click save, the container list will pop-up. If you received all listed containers, select ‘Route”. But for example: If you did not get a green tube but the orders can be performed on the GNG tube, you need to remove the G tube. Once you have selected ROUTE, the labels will print showing tests from the G tube were moved to the GNG tube. You will need to use this container ID for the specimen to downlaod correctly. | | | |  |
|  |  | If you remove a container and there is no alternate container listed for the test, you will not be able to route the route the order. Select Modify and reschedule the order. If you select MOVE, the order will go to the problem spot and will have to be canceled and re-ordered later. | | | |  |
|  |  | F. If you click on the **Modifier field** under the **Order Code box**, you will see the full description of the modifier listed above the box as indicated by the **RED ARROW** in the image below. **If there is a modifier present, you must use the Modifier Info to add to SDES on the following screen (ie, port 1).** The modifier info also displays on the Clinical Collect label and helps further identify the source of the specimen so culture results are accurately associated to the specimen submitted to the lab. Once done with this Screen, click **SAVE** and Enter.  This is where you would remove NTD if the nurse called to ask the lab to collect the sample.  C:\Users\CE001573\Desktop\2017-06-29_14-43-36.jpg | | | |  |
|  |  | G. After the **SAVE**, the **RESULT ENTRY** detail screen for **Result at Requisition Tests** will appear. Edit these as necessary to complete the Order Receipt Process. If Free Text appears in the SDES cell, replace it with the appropriate specimen type code(s) and remember to add any **Modifer information from the Order** (Detailed in #13 above).  C:\Users\CE001573\Desktop\2017-06-29_12-44-22.jpg | | | |  |
|  |  | H. The Micro Workcard label will now print for this specimen and the ORM window will return to the next unreceived specimen(s) for processing. Or back to the main window display to select another MRN or accession number. | | | |  |
|  |  | I. The label will indicate the next spot | | | | |
|  | **3** | **CREDIT/RESCHEDULE** | | | | |
|  |  | A. Click on Credit or Reschedule below the Order Code(s) box. | | | |  |
|  |  | B. Credit **Select** the test(s) that need to be **credited**. They will move to the box on the right.    In the example above, the ABG has been selected and moved over to the Credit window. Crediting/Cancelling in this window will **Remove Results**. If it is desired to keep any results associated with the test being credited/cancelled, please see the Credit Without Moving Results procedure. The Cancel Reason is mandatory. Cancel reasons can be searched by using the magnifying glass icon to the right on the Cancel Reason box. Once fields are completed, Click **OK** to complete the cancel. | | | |  |
|  |  | C. Reschedule  Select the tests that need to be rescheduled. They will move to the right side “To be Rescheduled” box. The Collect Date, Collect Time, New Accession Number and Reschedule Reason are all mandatory fields depicted in yellow below.    Click into the Date/Time fields and enter the desired future collection information. Click into the New Accession Number, but do not enter any information. Then click on the Reschedule reason and the New Accession Number will automatically populate. Then enter the Reschedule Reason and Click **OK** to save. The new accession number will qualify on Collection Manager/Clinical Collect for a future draw. | | | |  |
|  | **4** | **ADD ON TESTING** | | | | |
|  |  | A. From the Main Order/Receipt/Modification Window, search by Patient MRN or Accession. Select the Accession you wish to Modify. Type the new Test Order into the first open cell under the Order Code column. (To search for a test code, click the open cell and press F3).    In the example above, a PTT was added the original order of ABG and NA. Click **SAVE** to complete the added order.  Note: Using the F3 key in any field will bring up a Search box. | | | |  |
| **References** | Sunquest 7.2 Manual | | | | | |
| Training Plan/ **Competency**  **Assessment** | iMentor self-paced classes New employee training Upgrade Training LIS Competencies | | | | | |
| **Historical Record** | **Version** | | **Written/Revised by:** | **Effective Date:** | **Summary of Revisions** | |
| 1 | | P. Mattson | 7/18/2017 | Initial Version | |
| 2 | | Roxann Gulke | 8/8/2017 | Approved | |
| 3 | | Roxann Gulke | 10/22/2019 | SMART | |
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