

# Beaumont

Soft Lab/Mic

**ORDER ENTRY**

**Part 1 of 2**

**Beaumont<sup>®</sup> Laboratory**

# Topic Overview

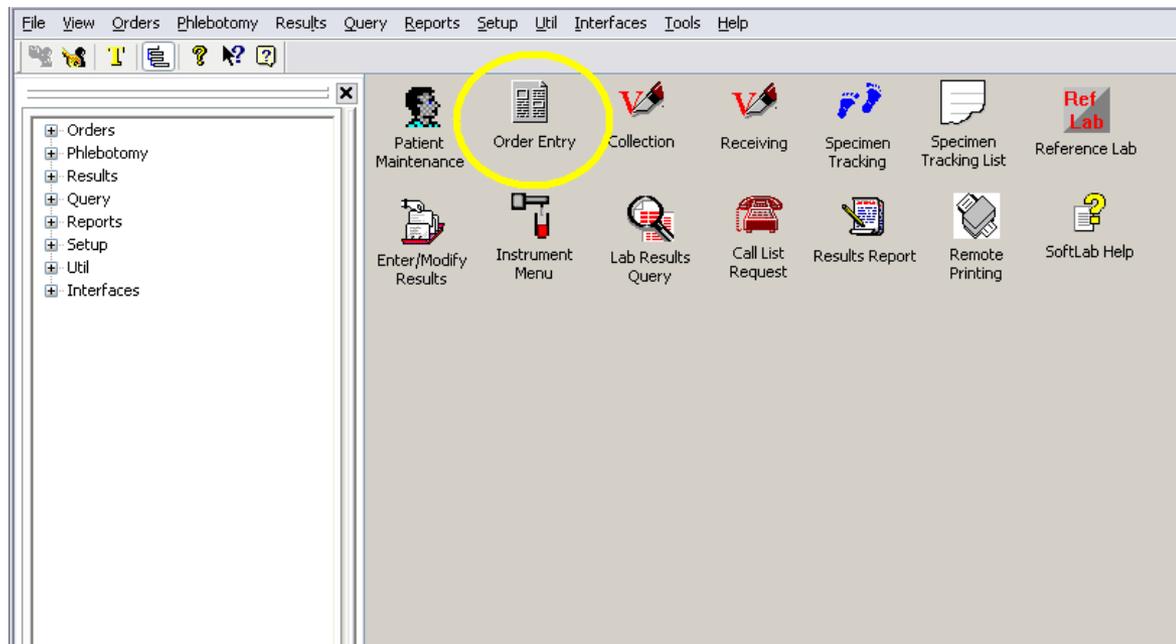
- Order Entry Screen Navigation
- Patient Order Information
- Locate Test ID; Place Order
- Specimen Receiving
- Label Printing

# Definitions / Abbreviations:

- **Important abbreviations used in the Order Entry tutorial:**
  - **OE:** Order Entry
  - **SSN:** Social Security Number
  - **ENV:** Performing laboratory environment code
  - **DOB:** Date Of Birth
    - Format MM/DD/YYYY
  - **MRN:** Medical Record Number
    - Assigned by EPIC OneChart

# Order Entry Screen Navigation

- Log On to **SoftLab**
- Double-Click on the Order Entry icon



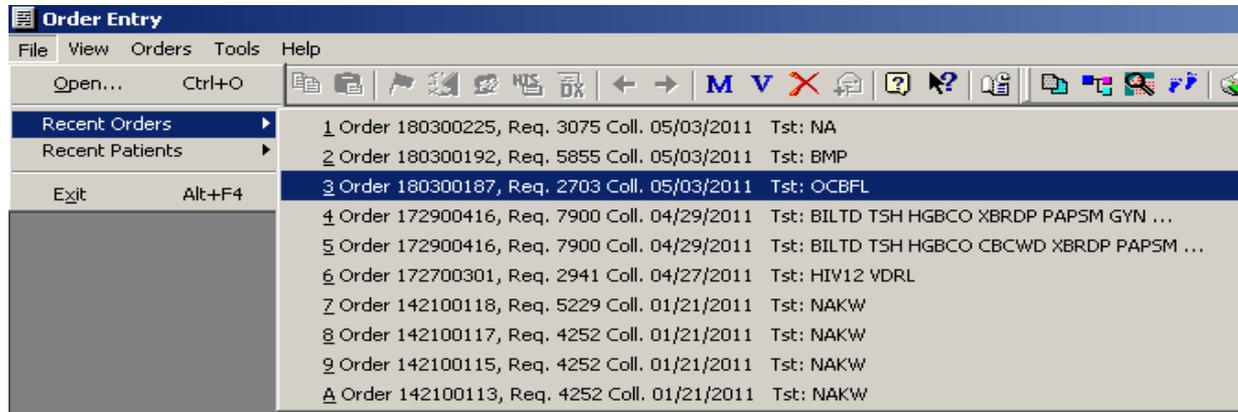
# Order Entry Screen Navigation

- You may search for a patient by entering any portion of patient demographics
- Place Cursor in Last Name field
  - Type Demosoft
  - Place cursor in First Name field and type \*\*\*\*\*
- Click Next to execute search

The screenshot shows a software window titled "Search" with three search methods: "Search by Patient", "Search by Stay", and "Search by Order". The "Search by Patient" section has a "Last Name" field containing "DEMOSOFT" and a "First Name" field. Other fields include MRN, SSN, Sex, MPI, DOB, and Race. The "Search by Stay" section has "Billing", "Ward", and "Att. Dr." fields. The "Search by Order" section has "Order", "Ord Date", "Reg. by", "Ordered By", and "Aux Order" fields. At the bottom, there is a checkbox for "Open in Edit Mode", a "Clear" button, and a row of navigation buttons: "More", "Back", "New", "Next", and "Cancel". The "Next" button is highlighted with a yellow circle.

Order Entry Search Window

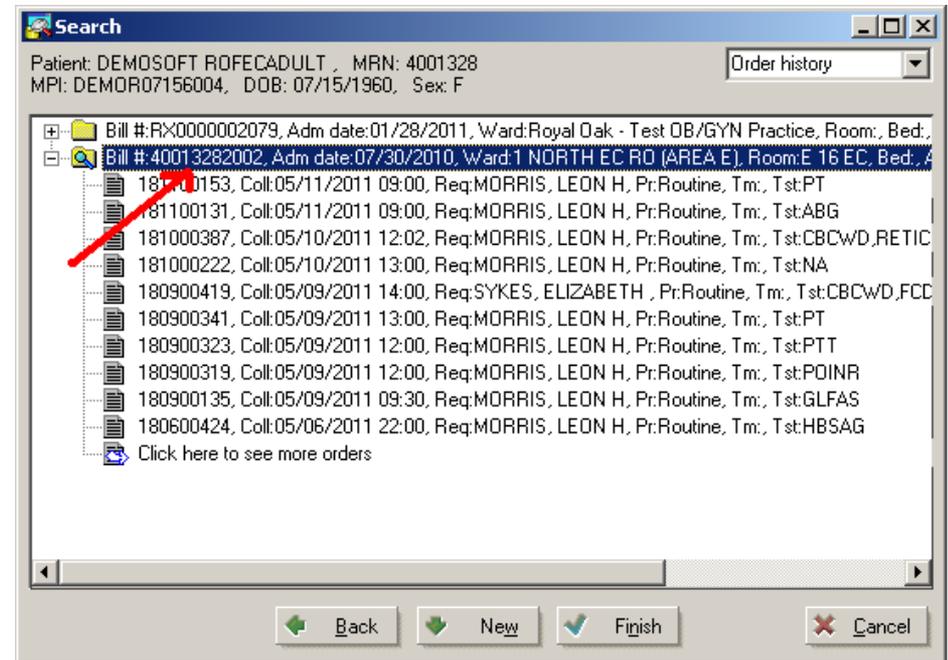
# Order Entry Screen Navigation



- Alternatively, to return to a recent order, click on **File > Recent Orders >**
  - Hover over the Orders with your mouse
  - Click the corresponding order #

# Order Entry Screen Navigation

- Click appropriate visit #
- Press [Enter]
- **Do not** create a new patient or a new stay.



# Order Entry Screen Navigation

Patient

Last name: DEMOSOFT first: ROFECADULT middle:

DOB: 07/15/1960 Age: 50 Deceased:  DOD: / / MRN: 4001328 Sex: female MPI: DEMOR07156004 Patient Comm

SSN: ESO: CASE Sp:

- The top portion of OE Window contains patient demographic information
- Demographic information is generated from Epic and sent TO Soft. User cannot modify the Soft record.

# Order Entry Screen Navigation

- The left hand side of the screen contains 5 tabs:
  - General
  - Insurance
  - Specimens
  - Results
  - BBank

The screenshot displays the Order Entry Screen with the following fields and controls:

- Navigation Tabs:** General (selected), Insurance (1), Specimens (0), Results (0), BBank.
- Stay Section:**
  - Alt. Dr.: 1198 MORRIS, LEON H
  - Billing: 40013282002
  - Adm. On: 07/30/2010
  - By: 1198
  - Dis Date: / /
  - Stay Comm:
  - Ward: R1N2 1 NORTH EC RD (AREA E)
  - Room: E 16 EC
  - Bed:
  - ISO:
- Order Section:**
  - Order:
  - At: 13:52
  - Date: 05/12/2011
  - By: AMARM
  - Active:
  - Depot: R1
  - Report To:
  - Reg. by: 1198 MORRIS, LEON H
  - Call:
  - Order Comm:
  - Orig ward:
  - Priority: Routine Order
  - Collect time: : :
  - Env: 00
  - Insur:
  - Diag:
  - Nurse Draw:
  - Aux Order:
  - Venip: none of the above
  - Req. #:
  - ABN:

# Order Entry Screen Navigation

- General Tab contains
  - **Order Information:**
    - Order Number
    - Time, Date, user ID
    - Call Instructions
    - Order Comments
    - Priority of Order
  - **Stay Information:**
    - Patient's current location
    - Attending Physician
    - Admission Date
    - Discharge date (if any)
    - Stay comments

The screenshot shows the 'General' tab of an order entry system. The 'General' tab is highlighted with a red circle. The form contains the following fields:

- Stay:
  - Att. Dr.: 1198 MORRIS, LEON H
  - Adm On: 07/30/2010
  - By: 1198
  - Dis Date: / /
  - Ward: R1N2 1 NORTH EC RD (AREA E)
  - Room: E 16 EC
  - Bed:
  - ISD:
  - Billing: 40013282002
  - Stay Comm:
- Order:
  - Order:
  - At: 13:52 05/12/2011
  - By: AMARM
  - Active:
  - Depot: R1
  - Report To:
  - Reg. by: 1198 MORRIS, LEON H
  - Orig ward:
  - Priority: Routine Order
  - Collect time: : :
  - Env: 00
  - Insur:
  - Diag:
  - Nurse Draw:
  - Aux Order:
  - Venip: none of the above
  - Req. #:
  - ABN:

General Tab

# Order Entry Screen Navigation

- Insurance and Diagnosis Codes
- Use the **Green Arrow** drop down menus to select **ANY** Insurance and Diagnosis Code

General Insurance (1) Specimens (3) Results (14) BBank

Stay  
Att. Dr: 1198 MORRIS, LEON H Billing: 40013282002  
Adm Dn: 07/30/2010 By: 1198 Dis Date: / / Stay Comm:   
Ward: R1N2 1 NORTH EC RD (AREA E) Room: E 16 EC Bed:   
ISD:   
Order:  
Order: 181300199 At: 10:34 05/13/2011 By: AMARM Active  Depot: R1  
Report To:   
Reg by: 1198 MORRIS, LEON H Call  Order Comm.   
Orig ward: R1N2 1 NORTH EC RD (AREA E)  
Priority: Routine Order Collect time:   
Insyr: 1023   
Diag: 002.2   
Aux Order: Venip: venipuncture Req #:   
ABN

Priority: Routine Order Collect time:   
Insyr: 1018P   
Diag: 002.2   
Aux Order: Venip: urine

# Order Entry Screen Navigation

- Insurance Tab
- Displays account information on the Insurance Provider for the patient, which you have selected from previous step

No	Code	Insurance Number	Name	Comment
1	1023	R60098765	BEAUMONT EMPLOYEE HEALTH PLAN C	<input type="checkbox"/>

Insurance number: R60098765 Price schedule: 0 Prefix: Group ID: R6

Insured Personal Information

Relation to insured:

Name (last,first,middle): DEMOSOFT ROFECADULT

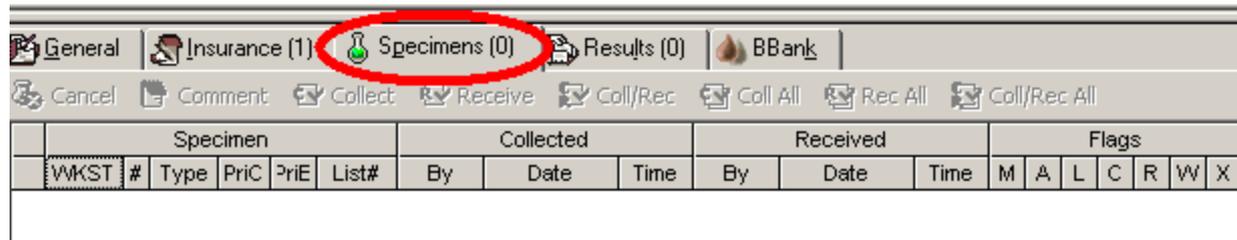
DOB: 07/15/1960 Sex: female

Street: 123 EASY WAY City: ROCHESTER

State: MI Zip: 48307- Country:

Insurance Tab

# Order Entry Screen Navigation



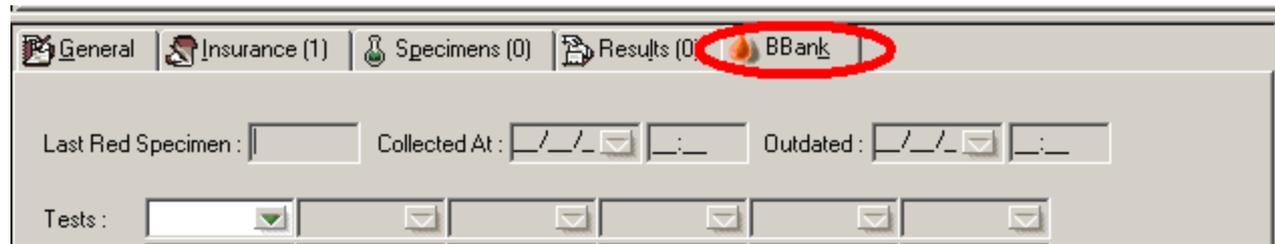
- Specimens Tab
- View Specimens Ordered by tube type and test ID
- Collect and Receive

# Order Entry Screen Navigation



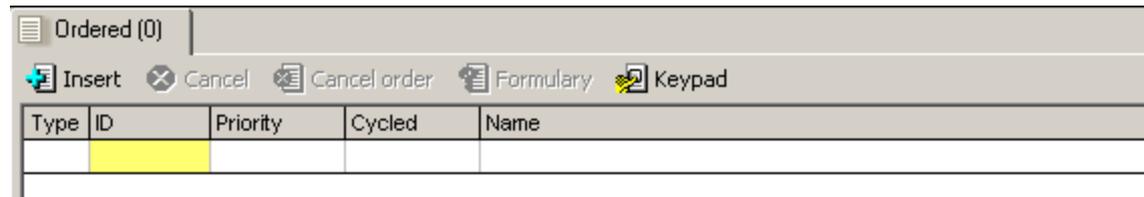
- Results Tab
- Review any results, if available under a particular Order Number
- Used only when results are required at order entry (i.e. Volume, Dosage Dates and Times, etc)

# Order Entry Screen Navigation



- Blood Bank Tab
- This area is where Blood Bank Orders may be found

# Patient Order Information

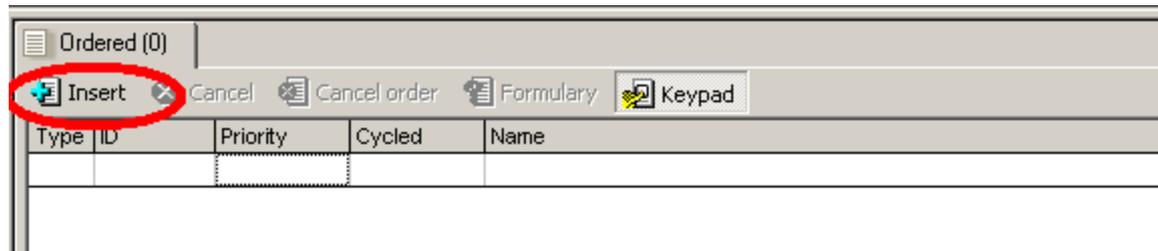


The screenshot shows a software interface for managing patient orders. At the top, there is a header bar with a list icon and the text "Ordered (0)". Below this is a toolbar with five buttons: "Insert" (with a plus icon), "Cancel" (with an X icon), "Cancel order" (with a document and X icon), "Formulary" (with a document icon), and "Keypad" (with a keypad icon). Below the toolbar is a table with five columns: "Type", "ID", "Priority", "Cycled", and "Name". The "ID" column in the first row is highlighted in yellow.

Type	ID	Priority	Cycled	Name

- The right hand side of the screen will be the area where the Test Order is placed

# How To Locate a Test ID



- To place an order, it is not necessary to know the Test ID Code.
- To find the Test ID, place your mouse on the **Test Order** portion of the OE screen (Far right section)
- Click on the **Insert** button to access a searchable Test Directory

# How To Locate a Test ID

Search Results window showing search criteria: Name: glucose, Dept: [empty], Code: [empty], 2-nd Id: [empty], Barcode Id: [empty], Type: ALL. The table below lists 16 test results.

#	Code	Test name	Type
1	\$AFID	Definitive ID, AFB	
2	\$AGG	Infectious Agent Detection, Immunoassay w/Direct Observ	
3	\$ANID	Definitive ID, Anaerobe	
4	\$BLAC	Susceptibility Studies, Enzyme Detection	
5	\$CONC	Concentration for Infectious Agents	
6	\$DFA	Infectious Agent Antigen Detection by Immunofluor Technique	
7	\$DZ	Susceptibility Studies, Agar Dilution, per Agent	
8	\$ESBL	Susceptibility Studies, Agar Dilution, per Agent	
9	\$ET	Susceptibility Studies, Antimicrobial Agent	
10	\$FLU	Infectious Agent, Antigen Detection	
11	\$HGFRM	Smear, Gram, Primary Source	
12	\$ID	Aerobic ID, Definitive	
13	\$KB	Susceptibility Studies, Disk Method	
14	\$KPC	Susceptibility Studies, Agar Dilution, per Agent	
15	\$MD	Professional Charge, MD	
16	\$MIC	Susceptibility Studies, Microdilution	

Buttons: Find (circled in red), OK, Cancel. Status: Total 50, Selected 1.

Search Results window showing search criteria: Name: glucose, Dept: [empty], Code: [empty], 2-nd Id: [empty], Barcode Id: [empty], Type: ALL. The table below lists 16 test results, with the first result selected.

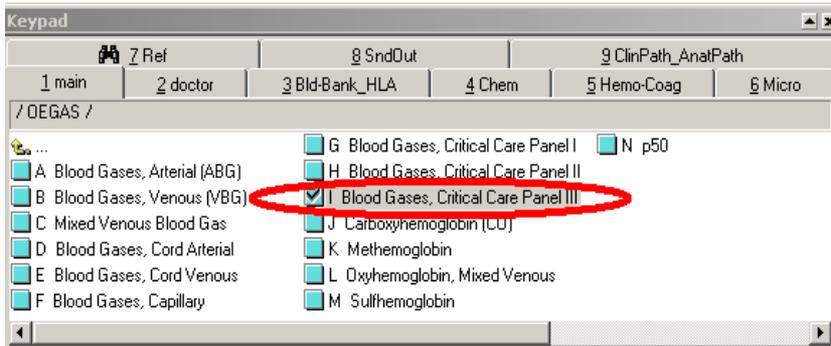
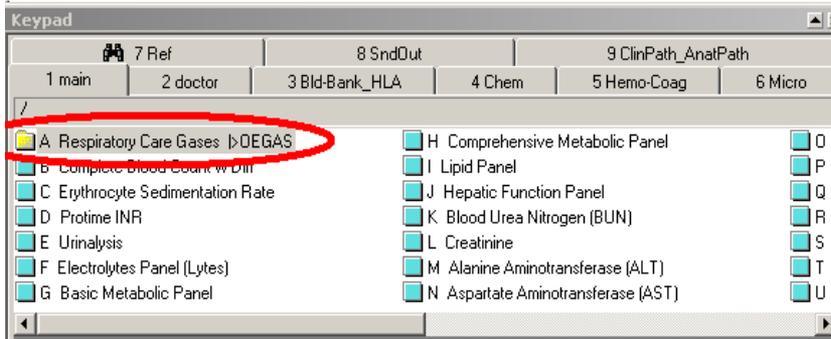
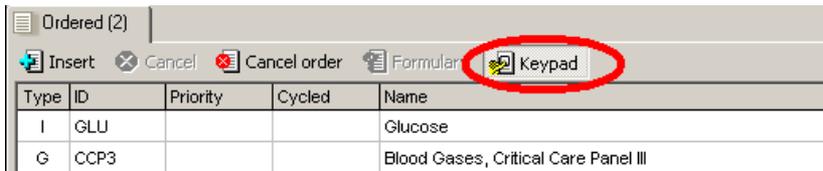
#	Code	Test name	Synonym	Type
1	BMG	Glucose Meter	Glucose Meter	
2	G100G	Glucose, Fasting and 1 hr post (100g glucola)	100	G
3	G100G	Glucose, Fasting and 1 hr post (100g glucola)	Fast	G
4	G100G	Glucose, Fasting and 1 hr post (100g glucola)	Glu	G
5	G100G	Glucose, Fasting and 1 hr post (100g glucola)	glucola	G
6	G100G	Glucose, Fasting and 1 hr post (100g glucola)	post	G
7	G50G	Glucose Pregnancy Screen, 1 hr post 50g glucola	Glucola	G
8	G50G	Glucose Pregnancy Screen, 1 hr post 50g glucola	Glucose	G
9	G50G	Glucose Pregnancy Screen, 1 hr post 50g glucola	Post	G
10	G6PD	Glucose 6 Phosphate Dehydrogenase (G6PD)	G-6-PD	G
11	G6PD	Glucose 6 Phosphate Dehydrogenase (G6PD)	G6PD	G
12	GL1PC	Glucose, 1 hr PC	PP Glucose	I
13	GL1PC	Glucose, 1 hr PC	PP Glucose	I
14	GL1PC	Glucose, 1 hr PC	PP Glucose	I
15	GL2PC	Glucose, 2 hr PC	2 Hr PC	I
16	GL2PC	Glucose, 2 hr PC	2 Hr PC	I

Buttons: Find, OK (circled in red), Cancel. Status: Total 73, Selected 1.

1. Type all or a portion of the Test Name in the **Name** box
2. Press Find; or [F2]

3. Results are displayed. If you see the desired test, click it with your mouse. Or, use the scroll bar at the side.
4. Press [Enter], or Click **OK**

# How to Locate Test ID



- **Keypad** - An alternate to the **Insert** function
- Contains frequently ordered Tests
  - Divided by Lab Department
- If not displayed, click on Keypad button
- Press the corresponding Letter associated with the test section
- Press Letter corresponding with Test Name

# Specimen Receiving

- Now that you chosen your desired tests, you will collect and receive them
- Click on Specimens Tab

Order Entry - [New Order - Edit Mode]

File Edit View Orders Results Specimens Tests Tools Window Help

Patient  
 Last name: DEMOSOFT first: ROFECADULT middle:   
 DOB: 07/15/1960 Age: 50 Deceased:  DOD:  MRN: 4001328 Sex: female MPI: DEMOR07156004 Patient Comm   
 SSN:  ESD: CASE Sp:

General Insurance (1) **Specimens (3)** Results (14) BBank

Cancel Comment Collect Receive Coll/Rec Coll All Rec All Coll/Rec All

Specimen						Collected			Received			Flags						
WKST	#	Type	PriC	PriE	List#	By	Date	Time	By	Date	Time	M	A	L	C	R	W	X
1	IRCHAR	1	S7T	R	R	0		05/13/2011				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	RSLAE	1	SYR	R	R	0		05/13/2011				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	RSLAE	1	NUL	R	R	0	AUTOV	05/13/2011	09:34	AUTOV	05/13/2011	09:34	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Type	ID	Priority	Cycled	Name
I	GLU			Glucose
G	CCP3			Blood Gases, Critical Care Panel III

# Specimen Receiving

## Specimens Tab:

- Specimen Information
  - Assigned workstation
  - Number of tubes per test
  - Tube type
    - E.g., S7T= SST
    - SYR= Syringe for blood gas
  - Date of Collection

General   Insurance (1)   Specimens (3)   Results (14)   BBank																			
Cancel   Comment   Collect   Receive   Coll/Rec   Coll All   Rec All   Coll/Rec All																			
	Specimen						Collected			Received			Flags						
	WKST	#	Type	PriC	PriE	List#	By	Date	Time	By	Date	Time	M	A	L	C	R	W	X
1	RCHAF	1	S7T	R	R	0		05/13/2011					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	RSLAE	1	SYR	R	R	0		05/13/2011					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	RSLAE	1	NUL	R	R	0	AUTOV	05/13/2011	09:34	AUTOV	05/13/2011	09:34	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Specimen Receiving

Use the following buttons for collect and receipt functions:

- **Collect:** Collect an individual specimen
- **Coll/Rec:** Collect and Receive and individual specimen
- **Coll All:** Collect all specimens
- **Coll/Rec All:** Collect and Receive all specimens

General   Insurance (1)   Specimens (3)   Results (14)   BBank																			
Cancel   Comment   <b>Collect</b>   Receive   Coll/Rec   Coll All   Rec All   Coll/Rec All																			
	Specimen						Collected			Received			Flags						
	WKST	#	Type	PriC	PriE	List#	By	Date	Time	By	Date	Time	M	A	L	C	R	W	X
1	RCHAF	1	S7T	R	R	0		05/13/2011					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	RSLAE	1	SYR	R	R	0		05/13/2011					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	RSLAE	1	NUL	R	R	0	AUTOV	05/13/2011	09:34	AUTOV	05/13/2011	09:34	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Specimen Receiving

- Press the **Coll/Rec All** button
- You will get a pop-up window asking  time
- Place mouse cursor in box under Collected
- Type in a time on or earlier than Receipt time
- Press **[Enter]** or click **OK**



**Verify Specimen(s)**

Collected

By: AMARM at: : 05/13/2011

Received

By: AMARM at: 10:09 05/13/2011

OK Cancel

# Specimen Receiving

- You will notice that by Receiving a specimen, a Received **date** and **Time** is now assigned
- You will also note that there are now check marks in the **Flags Box**

General Insurance (1) Specimens (3) Results (14) BBank																			
Cancel Comment Collect Receive Coll/Rec Coll All Rec All Coll/Rec All																			
	Specimen						Collected			Received			Flags						
	WKST	#	Type	PriC	PriE	List#	By	Date	Time	By	Date	Time	M	A	L	C	R	W	X
1	RCHAF	1	S7T	R	R	0	AMARM	05/13/2011	10:09	AMARM	05/13/2011	10:09	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	RSLAE	1	SYR	R	R	0	AMARM	05/13/2011	10:09	AMARM	05/13/2011	10:09	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	RSLAE	1	NUL	R	R	0	AUTOV	05/13/2011	09:34	AUTOV	05/13/2011	09:34	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Specimen Receiving

## Flags Box:

A check mark in these flag boxes indicate:

**M** - Specimen Message

**A** - Assigned to Phlebotomist

**L** - Label Printed

**C** - Collected

**R** - Received

**W** - On a worksheet

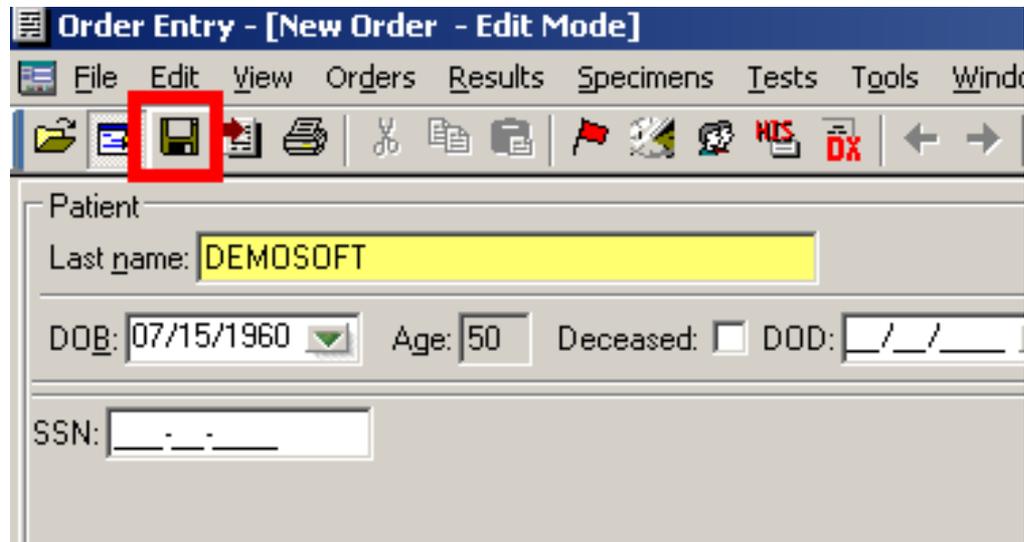
**X** - Cancelled

Flags						
M	A	L	C	R	W	X
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In this example there are Checks in the **A**, **C**, and **R** boxes, indicating specimen **Collection** and **Receipt**

# Saving Order

- Move to the top left corner of screen and click the Save Icon or **[Ctrl] + [S]**



# Saving Order

- A pop up window will be displayed to verify Medical Necessity.
- You should have already completed this in a previous step.
- If not, please select any Diagnosis code at this time
- Then click on **Check Medical Necessity** or **[F7]**

Medical Necessity Checking

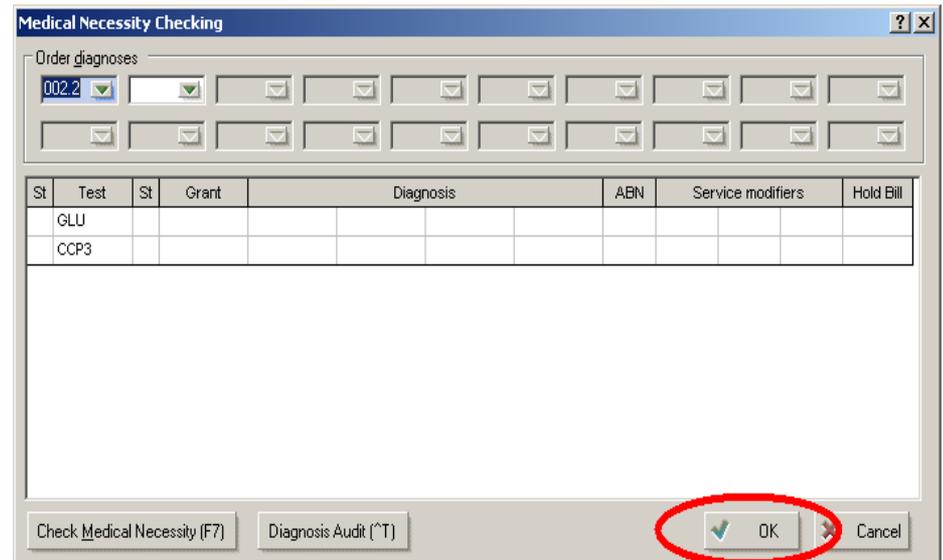
Order diagnoses: 002.2

St	Test	St	Grant	Diagnosis	ABN	Service modifiers	Hold Bill
	GLU						
	CCP3						

Check Medical Necessity (F7)    Diagnosis Audit (^T)    OK    Cancel

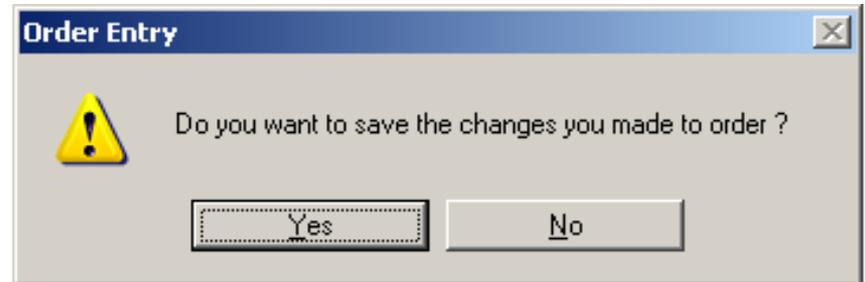
# Saving Order

- If the Error Dialogue box appears (at left), continue by pressing **OK** and continue on with the OE process
- Press [**Enter**] or click OK to exit Medical Necessity Checking box



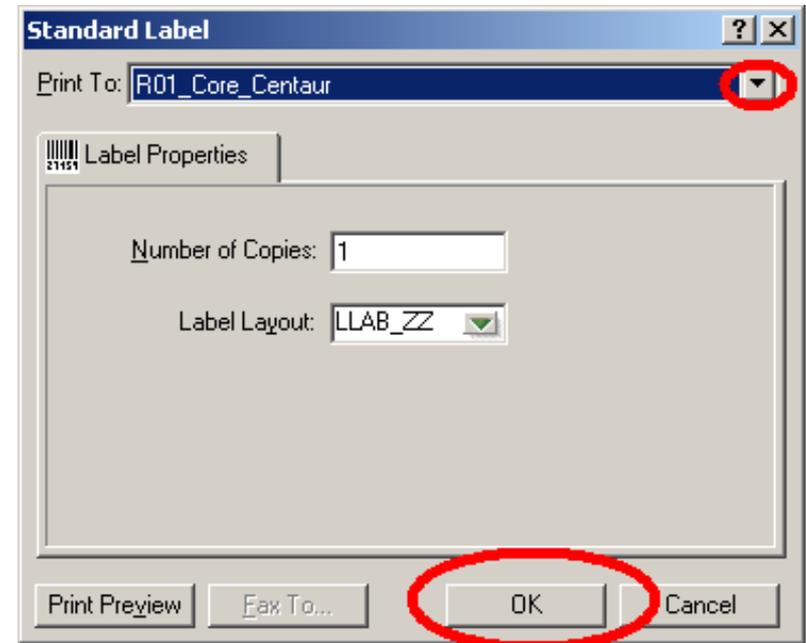
# Saving Order

- A Pop up box will appear asking you to confirm that you want to save order
- Press **[Enter]** or Click **Yes** to finalize the Order

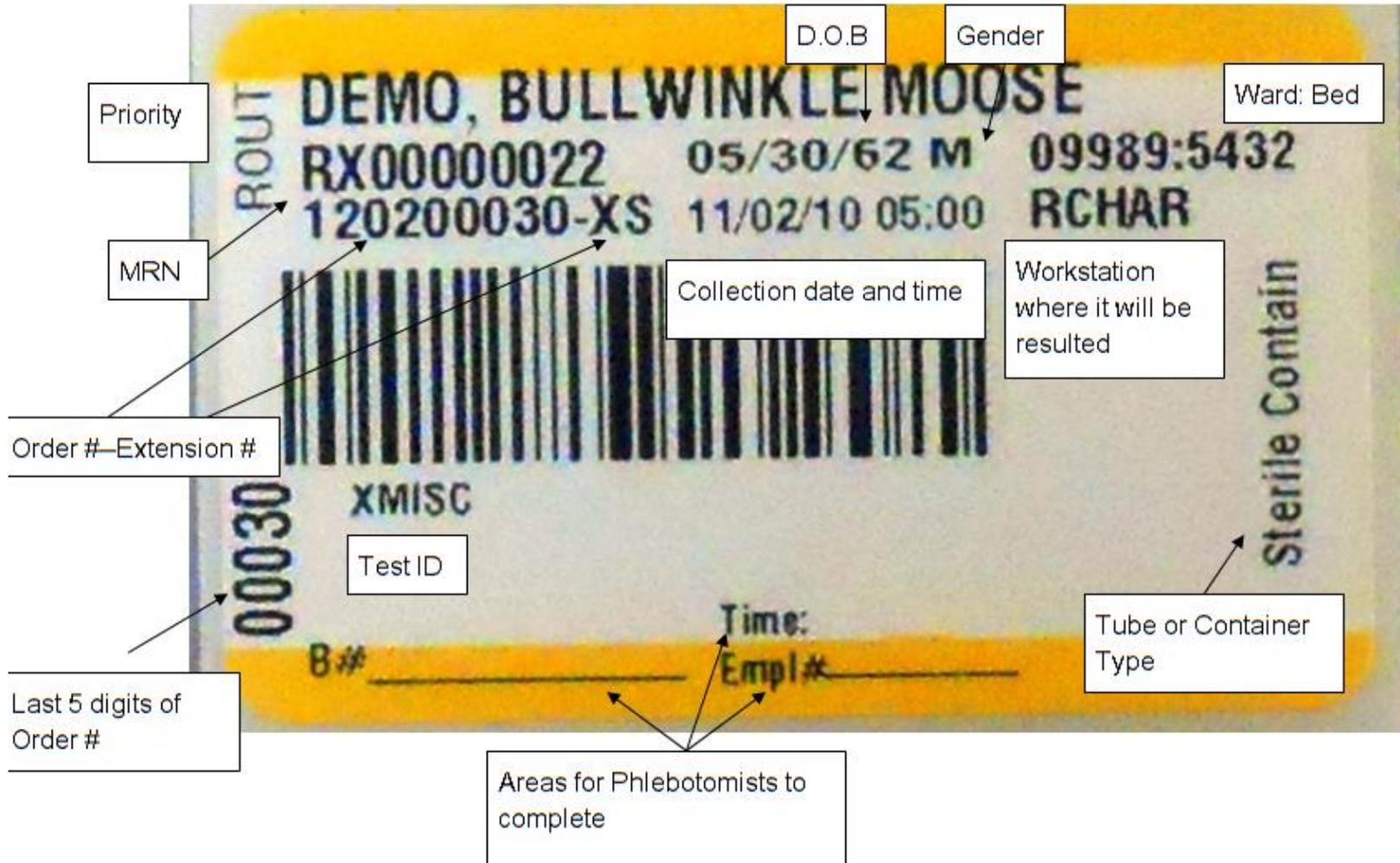


# Label Printing

- A label printing dialogue box will appear
- The **Print To** drop down menu should default to the printer closest to your terminal
- To change printers:
  - Click the drop down arrow next to the **Print To:** line and scroll down to the printer from which you wish to print the labels
- Once you have selected the printer of interest, click OK at the prompt



# Components of a Specimen Label



# Summary

This module covered the following information for **SoftLab**:

- Order Entry Screen Navigation
- Patient Order Information
- Locate Test ID; Place Order
- Specimen Receiving
- Label Printing

# Credits

- Questions on content and/or input or critique on required modifications should be addressed to:
  - Laboratory LIS Soft Support  
*LaboratoryLISSoftSupport@beaumont.edu*