

AP/CP SPECIMEN TRANSPORT QUICK START GUIDE

YaleNewHavenHealth | DTS Training

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AP/CP Specimen Transport

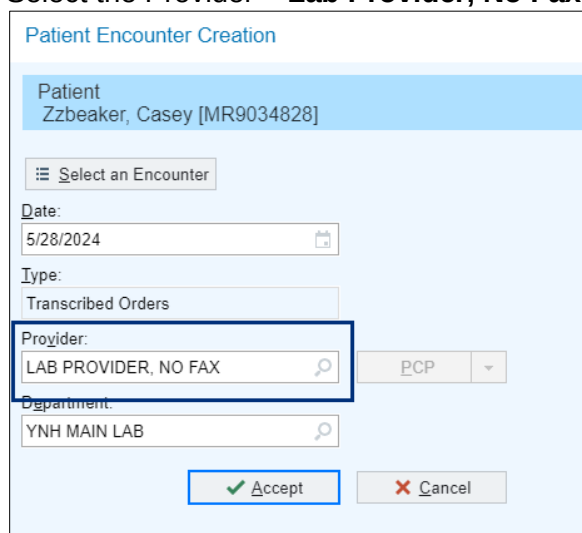
Pathology specimen transport between the BH, MC and YH Core labs to YNH Pathology and YNH Cytology can now be tracked using the Epic CP Beaker Packing List activity. Core Lab staff create a new shell test to add to the Packing List and specimens will be Received in Epic by YSM Pathology/Cytology. YSM staff will also need to create a new Encounter to print Beaker labels and add them to a Packing List for specimens that are sent to YNH Main Lab.

Creating Orders and Printing Beaker Labels

The following workflow is used at YNH, MC and BH Main Labs to add a shell test order and print a Beaker label. YNH Main Lab will add the specimen(s) to a Packing List destined for YSM Surgical Pathology or YSM Cytology Department. BH will deliver specimens to their Pathology Department who will send specimens to YSM Pathology/Cytology using Footprint to track to CoPath. YSM lab staff will use this workflow when sending specimens to the YNH Main Lab for delivery to other departments.

Create Encounter

1. Click **Transcribed Orders** on the Main Toolbar.
2. Search for and select the patient.
3. Select the Provider = **Lab Provider, No Fax**.



Patient Encounter Creation

Patient
Zzbeaker, Casey [MR9034828]

Select an Encounter

Date:
5/28/2024

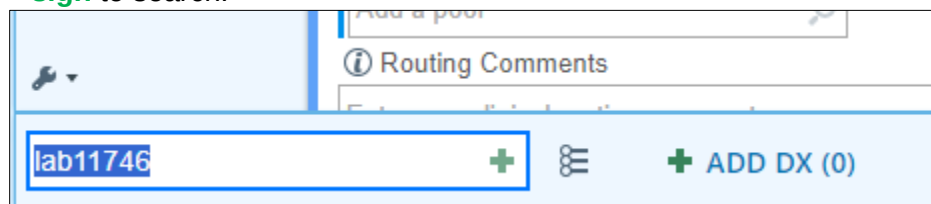
Type:
Transcribed Orders

Provider:
LAB PROVIDER, NO FAX

Department:
YNH MAIN LAB

Accept Cancel

4. Click **Accept**.
5. In the **+ Add Order** field, search for **Specimen Tracking Shell Test (BH YH) LAB11746**. Hit Enter or click **+ sign** to search.



lab11746 + ADD DX (0)

6. You may default to the Facility List tab or Preference List tab. **Click the Database tab** to find your test.

LAB11746

Browse Preference List Facility List Database

Search panels by user

After Visit Medications (No results found)

After Visit Procedures

Name	Px Code	Type	Pref List	Cost to...	Copay	Cov...
SPECIMEN TRACKING SHELL TEST (BH YH)	LAB11746	Lab Only				

During Visit Orders

- Click the title **Specimen Tracking Shell Test (BH YH)** to open the Order Composer window and edit the test information if it doesn't open automatically.
- Enter the required field for **Number of Specimens**.
- Enter the required field for **Types of Containers Received**. If you have more than one type of specimen container, hit Tab to open the next row to document each unique Container type. You do not need to repeat the same Container Type. There will be an empty row listed below a new row documented.
- Click **Accept** to save order changes.
- Click **Dx Association**. Add in a Diagnosis Code and associate it to the test. Use any generic code (Z00.00).
- Click **Sign Orders**.

Specimen Tracking Shell Test (BH YH)

Status: Normal Standing Future

Expected Date: Today Tomorrow 1 Week 2 Weeks 1 Month 3 Months 6 Months 1 Year

Expires: 10/28/2025 1 Month 2 Months 3 Months 4 Months 6 Months

Priority: Routine STAT

Class: Lab Collect Lab Collect Clinic Collect External

Submitter:

Lab: Resulting Agency: YALE-NEW H... Collection Date: Collection Time:

Release to patient: Immediate Delay Release

Number of Specimens 8

Types of Containers Received (ie Eswab) 9

Non-Epic Provider CC Results

Comments: Add Comments

Additional Order Details

Next Required

Accept Cancel

Dx Association 11 Edit Multiple Patient Estimate Options

After Visit

Specimen Tracking Shell Test (BH YH)

Routine, Lab Collect, Expires: 10/28/2025, Resulting Agency - YALE-NEW HAVEN HEALTH SYSTEM LAB

Select a pharmacy

Sign Orders (1) 12

Print Requisition

If you do not have a requisition to add a label to, print the Requisition from Chart Review. Print the requisition PRIOR to collecting the specimen. The Requisition will NOT be available after collecting the specimen.

- From within Patient Station, click **Chart Review**.

Chart Review

Encounters SnapShot Surgeries Consents Notes Media Results Review Labs Micro Genomics Path Blood Bank Imaging Procedures Card Proc ECG Other Orders

Preview Refresh (5:26 PM) Review Selected Flowsheet Route Egcounter Legacy Documents Rarely Used

Filters Default filter Yale New Haven L... Admissions Telephone Encounters Exclude Scan Doc Phone Consults Anesthesia Hospital Enc Surgery

Not all records have been loaded and sorted. Load remaining records to sort all records Load All Records Hide

B...	S...	When	Type	Enc Detail	With	Description	Status	Enc Dept	Chief Complaint	Attending Provider	CSN
Today			Transcribed Orders	Lab Provider, N		Encounter for general...	Open	YNH MAIN LAB - ...			80496113
09/13/2024			Transcribed Orders	Lab Provider, N		Encounter for general...	Open	YNH MAIN LAB - ...			80495661
08/29/2024			Lab Requisition	Mitchell Richards, K		Encounter for general...	Open	YNH MAIN LAB - ...			80493148

- Double-click the **Transcribed Orders** encounter on the Encounter tab. The Report Viewer opens.
- Click the **Specimen Shell Test** name of the Order on the right side of the screen.

Report Viewer

History

Today Transcribed Orders

Transcribed Orders [Open](#)

9/16/2024
Yale New Haven Laboratory Specimens

Lab Provider, No Fax Encounter for general adult medical examination without abnormal findings

Visit Information

Date & Time: 9/16/2024 5:25 PM Provider: Lab Provider, No Fax Department: Yale New Haven Laboratory Specimens Encounter #: 80496113

Travel Screening

No data to display

Additional Documentation

Encounter Info: [Billing Info](#), [History](#), [Allergies](#), [Detailed Report](#), [Visit Summary](#), [Evaluation Visit Report](#)

Communications

Orders Placed

Specimen Tracking Shell Test (BH YH)

Medication Changes

None

Medication List

Visit Diagnoses

Encounter for general adult medical examination without abnormal findings

Problem List

- Click on the link to **Reprint YNHHS Pathology Requisition**.

Report Viewer

History

Today Transcribed Orders

AMB Order Hyperlink Report

Types of Containers Received (ie Eswab) urine cup 3

Future Order Information

Expires: 11/16/2025

Order Information

Date: 9/16/2024 Department: Yale New Haven Laboratory Specimens Ordering: Associate, Lab Authorizing: Lab Provider, No Fax

Order Information

Order Date/Time: 09/16/24 05:25 PM Release Date/Time: None Start Date/Time: 9/16/2024 End Date/Time: None

Frequency: None Duration: None Priority: Routine Order Class: Lab Collect

Order Provider Info

Ordering User: Associate, Lab Office phone: -- Pager: -- E-mail: --

Authorizing Provider: Lab Provider, No Fax -- -- --

Order History

Date/Time: 09/16/24 17:25 Action Taken: Sign User: Associate, Lab Additional Information: Outpatient

Additional Information

Associated Reports

View Encounter

Priority and Order Details

Collection Information

Order Details

Order ID: 30559320

Reprint YNHHS Lab Draw Requisition

Specimen Tracking Shell Test (BH YH) (Order #30559320) on 9/16/24

Reprint YNHHS Pathology Requisition

Specimen Tracking Shell Test (BH YH) (Order #30559320) on 9/16/24

Reprint Requisition

Specimen Tracking Shell Test (BH YH) (Order #30559320) on 9/16/24

Reprint GH Pathology Requisition

Specimen Tracking Shell Test (BH YH) (Order #30559320) on 9/16/24

Reprint Quest Lab Draw Requisition

Specimen Tracking Shell Test (BH YH) (Order #30559320) on 9/16/24

- Right-click on the requisition and **select Print** from the drop-down menu.

Collect Specimens

Use the Order Inquiry activity to collect the specimen(s) and print a label.

- Click **Patient Station** on the Main Toolbar.
- Search for and select your patient.
- Double-click on the Transcribed Orders encounter.
- On the **Order Inquiry** activity, select the order for Specimen Tracking Shell Test.
- Click Collect Specimens.

Order Inquiry

Refresh Views Current History All Release **Collect Specimens** Cancel CC Results Link Orders Pat. Reports Proc. Catalog Spec. Inquiry

T	Q.	Qu...	S...	Order Date	Expected	P	R...	Specimens	Order	A	S...	D...	Lab ST...	CI	Authorizing Provider	Appt Date	Exp C
✓				05/30/2024		Y...			Specimen Tracking Shell Test (BH YH)						Lab Provider, No Fax		

- Click **Print Label** in the bottom-right corner. Only one label will print regardless of the number of specimens.
- A Misc Container specimen number will generate.

8. **Add label to requisition.** Label does not need to be applied to one of the containers.
9. **Write the number of specimens on the Requisition.**
10. Click **Collect All** in the bottom right corner.
11. Click **Receive**.

Send Specimens via Packing List

Generate a Packing List to the YM Pathology Department or YM Cytology Department.

1. Click **Packing List Editor** on the Main Toolbar or the Epic drop-down menu.
2. Click **+Create New**.
3. Use the YNHHS Generic Packing List Type.
4. Click **Create New**.
5. Enter a **Destination**:
 - a. Select **YSM Surgical Pathology Lab** or **YSM Cytology Lab**.
 - b. If YSM Surgical Pathology/Cytology are sending specimens to YNH Main Lab, choose **YNH Main Lab** as your destination.

6. Scan the specimen barcode to add to the Packing List.
7. In the **Test to Ship** section:

- a. Check off the box **next to EACH test name** for Specimen Tracking Shell Test.

The screenshot shows a web interface with two tabs: 'Details' (selected) and 'Snapshot'. Below the tabs is a section titled 'Tests to Ship for 24Y-151SP0001'. Inside this section, there is a row for the 'Specimen Tracking Shell Test' with the status 'On Test' and the identifier '24Y-151SP0001'. A small, empty checkbox is located to the left of the test name.

- b. A green check mark will appear next to the test.

This screenshot is similar to the previous one, but the checkbox next to 'Specimen Tracking Shell Test' is now checked, indicated by a green checkmark. The rest of the interface remains the same.

- c. If you don't check the box, an Aliquot will be auto created when the Packing List is shipped.

8. When all specimens have been added, click **Ready**.

9. Click **Picked Up** to print out the Packing List. Add one copy to the specimen bag and retain the second copy.

The screenshot shows the bottom of the interface. On the left, there is a 'Destination:' label followed by a text box containing 'YSM Cytology Lab' and a magnifying glass icon. On the right, there are two buttons: 'Ready' (with a green checkmark icon) and 'Picked Up' (with a right-pointing arrow icon). Both buttons are highlighted with a blue border.

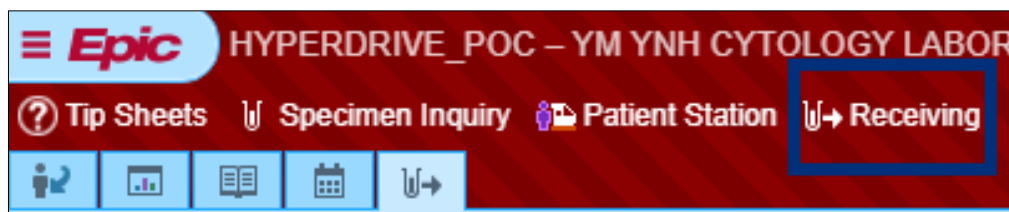
YSM YNH Cytology Laboratory Workflow

Receiving Specimens

1. **Log in to Epic** and select the Department **YM YNH Cytology Laboratory**.
 - a. If you have another Department listed here, click in the field, and erase the existing Department. Type the new Department.
 - b. Your Department will default the next time you log in.

The screenshot shows a 'Department:' label followed by a text box containing 'YM YNH CYTOLOGY LABORATORY' and a magnifying glass icon. The text box is highlighted with a blue border.

2. Click the **Receiving** activity on your Main Toolbar or in the Epic drop-down menu.



3. The first time you open the Receiving activity, a report menu will appear.
 - a. Click **Lab Receiving**.
 - b. Click **My Default** check box.
 - c. Click **Run**.
 - d. The report will not appear again if you choose the My Default check box.

4. Scan the specimen barcode for the Specimen Tracking Shell Test.
5. A green check mark appears in the first column and a green bar appears in the middle column as confirmation the specimen is Received.

H	F	Q	C	R	Container	Tests	Collector	Patient
✓					4B-151SP0001.1		Lab. Client Services	Zzbeaker, Casey

Collection Info
 Date/Time: 5/30/2024 11:50 AM
 Collector: LAB. CLIENT SERVICES
 Department: BH LAB SPECIMENS
 Draw Type: Collection
 Type: Other
 Source: MISCELLANEOUS CONTAIN...
 Container Type: MISCELLANEOUS CONTAIN...
 Site:
 A/C:
 Specimen Flags:
 Lab Comments:

Destinations

Test	Accessioned	Destination	List
Specimen Tracking Shell Test	BH MAIN LAB	BH MAIN LAB	

Specimen Tracking Shell Test
 Order Question: Answer Immediate
 Release to patient: Non-Epic Provider CC Results
 Number of Specimens: 2
 Types of Containers Received (ie Eswab): sterile container

Contacts
 Lab Provider: No Fax
 Authorizing Provider: BH LAB SPECIMENS 203-364-3000 Phone
 Ordering Doctor: SPECIMEN TRACKING SHELL TEST (BH TR) (4401146)

Alternate Specimen IDs

Internal Specimen	Specimen MPI
13762	70013761
24B-151SP0001.1	10027080

6. There may be more than one specimen associated with this test. Review the Order Details on the Receiving activity to confirm the number of specimens for the patient.

Zzbeaker, Casey
MRN MR9034828
F, 32 years, 3/28/1992

24B-151SP0001
Other, Collection
x2

Collected: 05/30/2024 11:50 AM
Received: 05/30/2024 11:50 AM

✓ 24B-151SP0001.1: Received
✓ 24-GNRC157: Packing list complete

Collection Info [0] Apply All

Date/Time: 5/30/2024 11:50 AM [1] Now
Collector: LAB, CLIENT SERVICES [2] LAB, CLIENT SE...
Department: BH LAB SPECIMENS [3] BH LAB SPECIM...
Draw Type: Collection [4] Collection
Type: Other
Source:
Container Type: MISCELLANEOUS CONTAIN...
Site:
A/C:
Specimen Flags:
Lab Comments:

Destinations

Test	Accessioned	Destination	List
Specimen Tracking Shell	BH MAIN LAB	BH MAIN LAB	

Specimen Tracking Shell Test 24B-151SP0001.2

Order Question: Release to patient
Answer: Immediate
Non-Epic Provider CC Results:
Number of Specimens: 2
Types of Containers Received (ie Eswab): sterile container

Contacts

Lab Provider, No Fax
Authorizing Provider: N/A
BH LAB SPECIMENS
Ordering Department - SPECIMEN TRACKING SHELL TEST (BH YH) [LAB11748] 203-384-3000 Phone

Alternate Specimen IDs

Internal Specimen	13762
Specimen MPI	70013761
24B-151SP0001.1	10027080

View Specimen Details

To view the location of a specimen, use the Specimen Inquiry by Specimen Activity.

1. Click **Specimen Inquiry > Specimen Inquiry (by Specimen)** on your Main Toolbar or in the Epic drop-down menu.
2. **Scan your Specimen Number.**
3. The Specimen Tracking section provides a detailed list of the specimen activities and will identify where the specimen is currently located.

Specimen Inquiry: 24Y-151SP0001

Specimen Inquiry

24Y-151SP0001 Instrument ID: 10027

Zzbeaker, Casey (MRN MR9034828) Coll. Dept: Main Lab

Other
Collected Today 11:35 AM by Lab, Client Services
Container: 1 Misc. Container Draw Type: Collection

Specimen Tracking

Date/Time	Detail	User	Location
05/30/2024 01:39 PM	Packing List Shipped	Lab, Client Services	Main Lab SEC0303043447EA
01:39 PM	Packing List Locked	Lab, Client Services	Main Lab SEC0303043447EA
11:40 AM	Added to Packing List	Lab, Client Services	Main Lab SEC0303043447EA
11:35 AM	Charge Triggered	Lab, Client Services	Main Lab
11:35 AM	Received	Lab, Client Services	Main Lab SEC0303043447EA
11:35 AM	Patient ID Scan Not Required at Collection	Lab, Client Services	Main Lab SEC0303043447EA
11:35 AM	Specimen ID Scan Not Required	Lab, Client Services	Main Lab SEC0303043447EA
11:35 AM	Collection Updated	Lab, Client Services	Main Lab SEC0303043447EA
11:30 AM	Patient ID Scan Not Required at Accessioning	Lab, Client Services	Main Lab SEC0303043447EA
11:30 AM	Specimen Created	Lab, Client Services	Main Lab SEC0303043447EA