**UW Medicine - Pathology**

8000-01-01-04

Progression and Regression of Cases in PowerPath

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| Adopted Date: 12/01/09  Revision Date: |

PURPOSE

To maintain cases in their correct state of completion.

PROCEDURE

1. Open the case in PowerPath. The case status box should indicate at what stage the case is at, i.e. needs gross dictation, needs final diagnosis, or needs resident/faculty review.
   1. Make sure the case is assigned to the correct tech/resident/faculty member (which is the person dictating the case). If it is a tech or PA dictating, switch it back to the responsible resident/faculty when saving the job. This will allow for an accurate routing history and document all who have been responsible in dictating the report.
   2. Do not leave a case in a tech's or PA's queue. They are not responsible for signing out the case. If you don't know who is responsible for the case, go into PowerPath fo that information, or you can check under the "responsible personnel" tab in the case progression status box.
   3. Often time's residents will help each other with the grossing, but this does not make them responsible for signing out the case. Keep the case assigned to the responsible resident. You only assign it to the resident or PA helping with the case when you open it to document their part in it, but then reassign it to the appropriate resident when saving the job, keeping in mind to keep it at the correct status as well (see step #2 for regressing cases). Keeping cases in the correct queue also assists the front desk in knowing who to direct calls to.
2. If transcribing a gross description, and the gross is incomplete, when saving the case answer "yes" when prompted to update case status. Then click on the ellipse next to the case status box and select "gross dictation". Don't simply answer "no" at the progression status to "final diagnosis by resident/faculty". Regress the case back to "gross description". This will make it apparent to the next person going into the case what the case status is and avoid progressing the case too far. Also, when transcribing a gross description, if the person dictating skips a part, enter that part designation (i.e. A, B, C) and leave it blank. This will serve to alert both resident and transcriptionists that the case is incomplete. If in doubt as to whether the gross is complete or not, go into PowerPath and enter the accession number. Then select the specimen tab and it will list all of the specimens for the case.
3. If the gross dictation is complete, simply enter through all of the prompts to progress the case to the correct status, making sure that the correct status is selected for "needs final diagnosis by resident" or "needs final diagnosis by faculty". This is important so that a faculty member's signature line doesn't say "resident physician".
4. When transcribing the final diagnosis and saving the completed report, make sure that the case is progressed to "resident review" or "faculty review", for the reasons mentioned above.
5. If you make a mistake in the progression of a case, you are the only one who can change the mistake short of sending a tech request. Open the case in PowerPath and click on the ellipse next to the upper right hand box for "case status". A window will open and the top box will indicate the "current step". Click on the ellipse next to that box and select the correct case status and then click "OK".
6. When transcribing a case that will be completed in one job such as an outside consult case or renal case, progress the case all the way to "Faculty review" or "Resident review" when saving the case.

Written / Revised By: Director Approval:

Sandi Lachica (Signature and Date)

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