

Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**.

Document Send Out Diagnostic Tests

Last Modified on 06/26/2020 2:40 pm EDT

Version 20.4

Overview

In this section, you will learn how to document a Send-Out Diagnostic Test for a patient. These tests can be saved, printed, or sent to the OP Patient Portal if the patient has an active portal account. Send-Out Diagnostic Tests can only be sent to the portal by practice staff who have an associated user account on the IntelliChart Practice Portal.

Complete Diagnostic Test Requisition Form

1. Navigate to the Diagnostic Test Requisition Form:
 - **From the patient chart** Window Navigation Panel > Diagnostic Tests > New Send-Out button
 - **From the visit note** Window Navigation Panel > Diag Tests > New Send-Out button
 - **From an existing task** Double-click Send-Out lab task
2. Confirm or enter the following information in the left-side panel of the window:
 - Ordered by
 - Facility
 - Flag date
 - Service
 - Fasting
 - Specimen collection: If **in-house** is selected, the blood-draw and specimen handling sections of the window are enabled.
3. Confirm or enter the **Diagnosis** associated with the test.
4. Search for the test and select the checkbox in the checklist column, if not already done. If multiple items are selected, but you are not completing all of them, deselect the test(s) you are not completing.

Save, Print, or Send to the Portal

Save the Requisition Form

After completing the Diagnostic Test Requisition form details, click the **Save** button to save the lab requisition. The Requisition Status is set to Pending.

Print the Requisition Form

1. After completing the Diagnostic Test Requisition form details, select the **Print** checkbox, and click the **Save** button. The Requisition Status is set to Pending.
2. Complete the Medical Record Disclosure Tracking, and click **OK**.

Send the Requisition Form to the Portal

1. After completing the Diagnostic Test Requisition form details, select the **Print** checkbox.

2. Select the **Share to portal** checkbox.
3. If needed, edit the **Portal Exp Date**. Or, leave the default date set.
4. Click the **Save** button.
5. In the Print Preview window, click the **Print** button, or proceed to step 6 if the Print window is displayed.
6. Select the **Print to File** checkbox and ensure **PDF File** is selected in the Type drop-down.
7. Click **OK**.
8. If a printed copy is not needed, close the print window.
9. Complete the Medical Record Disclosure window, and click **OK**. The Requisition Status is set to Pending, and the requisition is sent as a PDF to the patient's portal account where it is available until the date selected. After the specified date, if the portal user attempts to view the document, they will receive a message informing them to contact the practice.

Version 20.3

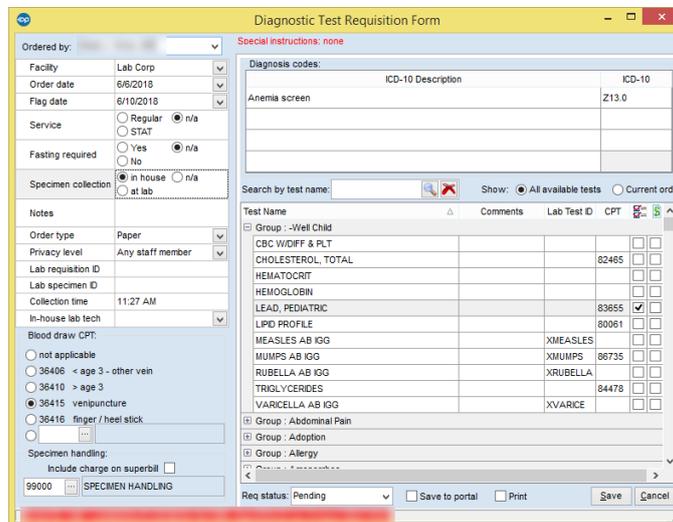
Overview

In this section, you will learn the how to document and send out diagnostic test results for a patient.

Document Send Out Diagnostic Tests

1. To open the **Schedule and Practice Workflow** window, in the **Smart Toolbar**, click the **Sched** button
2. Click the **Tracking** tab
3. Locate the **Patient** whose diagnostic test task must be completed
4. In the **Tasks** column for the patient, click the **Checklist** icon
5. Double-click on the **Lab Facility Name**.

The **Diagnostic Test Requisition Form** is displayed.



6. Confirm and/or enter the following information into the left panel:

- **Flag date**
- **Service**
- **Fasting**
- **Specimen collection:** if collection was done in-house, you will have to option of selecting a blood draw and specimen handling CPT codes.

7. Confirm the **Diagnosis** associated with the **Test**
8. Confirm that you are performing all of the **Tests** that are displayed with checkmark in the checklist column. If multiple items are selected, but you are not completing all of them, deselect the **Test(s)** you are not completing.

9. Click the **Save** button to save your **Lab Requisition**. The **Requisition** is now Pending.



Note: To save the requisition to the patient portal, or to print the requisition, select the applicable checkbox at the bottom of the **Diagnostic Test Requisition Form** prior to clicking the **Save** button.