

Reviewing Diagnostic Tests

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OP sets **all defaults to share all information**. Any individual decisions by Practice-users to restrict information sharing (access, use, or exchange) are the responsibility of the Practice in the implementation of its 21st Century Cures Act Information Blocking policies and procedures for its Practice and patients.

Version 20.15

About

In this article, you will learn how to review and complete open lab requisitions. In addition, you will be introduced to how to monitor the diagnostic tests and perform follow-up. The user will be shown optional settings to ensure all open diagnostic tests are addressed.

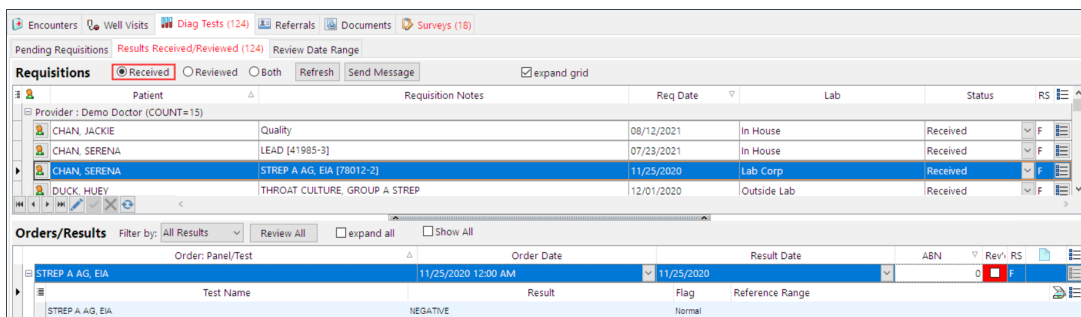
Review and Finalize Lab Requisitions

1. Click **Received** on the Main Navigation panel, the **Results Received/Reviewed** tab is selected on the Clinical Work window.



Note: The Dates section is unavailable, this allows a user to see all requisitions that are currently either Reviewed or Received.

2. Confirm the Received radio button is selected and highlight a **Patient** in the Requisitions panel, the test results are displayed in the **Orders/Results** panel.



The screenshot shows the Office Practicum interface. The top navigation bar includes 'Encounters', 'Well Visits', 'Diag Tests (124)', 'Referrals', 'Documents', and 'Surveys (16)'. The 'Diag Tests' tab is active, showing 'Pending Requisitions: Results Received/Reviewed (124)'. Below this, there are radio buttons for 'Received' (selected), 'Reviewed', and 'Both', along with 'Refresh' and 'Send Message' buttons. The 'Requisitions' table lists patients and their requisitions. The 'Orders/Results' panel is expanded, showing a table of test results for 'STREP A AG, EIA'.

Patient	Requisition Notes	Req Date	Lab	Status	RS
Provider : Demo Doctor (COUNT=15)					
CHAN, JACKIE	Quality	08/12/2021	In House	Received	F
CHAN, SERENA	LEAD [41985-3]	07/23/2021	In House	Received	F
CHAN, SERENA	STREP A AG, EIA [79012-2]	11/25/2020	Lab Corp	Received	F
DUCK, HUEY	THROAT CULTURE, GROUP A STREP	12/01/2020	Outside Lab	Received	F

Order: Panel/Test	Order Date	Result Date	ABN	Rev'd	RS
STREP A AG, EIA	11/25/2020 12:00 AM	11/25/2020			

Test Name	Result	Flag	Reference Range
STREP A AG, EIA	NEGATIVE		Normal

3. Select the **Expand All** checkbox so all results, for the selected lab requisition, are displayed.
4. Select the **Rev'd** checkbox on each order or if multiple results select the **Review All** button.
5. Repeat the above steps to review all lab requisitions.
6. Finalize the lab requisition(s).
 - a. Select the Reviewed radio button in the Requisitions section
 - b. Click the drop-down in the Status column and select Informed or Complete.
 - c. Repeat the above steps to finalize all requisitions

Review Pending Lab Requisitions



1. Click **Received** or **Reviewed** on the Main Navigation panel, the **Results Received/Reviewed** tab is selected on the Clinical Work window.
2. Click the **Pending Requisitions** tab.

Encounters Well Visits Diag Tests Referrals Documents Surveys												
Pending Requisitions Results Received/Reviewed Review Date Range												
Refresh Print Send Message All locations expand grid												
Provider												
#	Req Date	Pat ID	Patient	Notes	Location Name	Spec Coll	Spec ID	Req ID	Lab	Status	Flag Date	Private
	8/5/2021	7483	BRADY, GREG	LEAD [41985-3]	ABC Peds LLC	In House			In House	Pending	8/9/2021	0
	7/29/2021	8586	ZALLY, ZALLY	Fluoride Varnish [XFLUORVIA]	ABC Peds LLC	In House			In House	Pending	8/2/2021	0
	7/15/2021	7517	DUICK, HUEY	CULTURE, EYE	ABC Peds LLC	n/a			Outside Lab	Pending	7/19/2021	0
	6/25/2021	7200	TEST, GABI	LEAD [41985-3]	ABC Peds LLC	In House			In House	Pending	6/29/2021	0
	6/22/2021	8401	DUICK, LOUIE	ABDOMINAL CT SCAN W/ & W/O CONTRAST [74170]	Main Office	n/a			Outside Radiology	Pending	6/26/2021	0
	6/22/2021	8401	DUICK, LOUIE	TSH W/FREE T4 RFX	Main Office	n/a			Outside Lab	Pending	6/26/2021	0
	6/22/2021	7484	PARKER, SPIDEV	CHEST CT SCAN W/ & W/O CONTRAST [71270]	Main Office	n/a			Outside Radiology	Pending	6/26/2021	0
	6/22/2021	7484	PARKER, SPIDEV	THROAT CULTURE	Main Office	n/a			Outside Lab	Pending	6/26/2021	0

3. Below are actions that may be taken from this window.



Warning: Always follow the Practice policy if choosing to make changes from the Pending Requisitions window.

-  : Select the icon to view the details of the lab requisition.
-  : Click the icon to go to the Patient chart.
- Notes:** Diagnostic test name. You may click into the field and add additional information.
- Location Name:** Name of the location the test was ordered, if incorrect, click the drop-down and select from the list.
- Spec Coll:** Location where the specimen was collected, if incorrect, click the drop-down and select from the list.
- Lab:** Lab location, if incorrect, click the drop-down and select from the list.
- Status:** The status of the lab test, to change, click the drop-down and select from the list.
- Flag Date:** Date the diagnostic test results should be available, to change, click the drop-down and select from the list.

4. (Optional) Click the **Print** button to print the Pending Requisitions report.

Reviewing the Date Range

- Click **Received** or **Reviewed** on the Main Navigation panel, the **Results Received/Reviewed** tab is selected on the Clinical Work window
- Click the **Review Date Range** tab.
- The Start date and End date will default to 1 week. To change, click the **drop-down** and select from the calendar.
- Click the **Refresh** button.

Pending Requisitions Results Received/Reviewed Review Date Range												
Start date: 7/1/2019 End date: 8/7/2019 Refresh Print Highlighted item only expand grid												
Provider												
#	Lab Req Date	Result Date/Time	Pat ID	Patient	Lab	Status	Order Panel/Test	Result Test Name	Result	Abnl Flag	Req Spec ID	Result Spec ID
Provider: An Administrator (COUNT=19)												
	7/2/2019	7/2/2019	195	TEST, ASHLEY	In House	Pending	CHOLESTERO L	Total Cholesterol				
	7/2/2019	7/2/2019	195	TEST, ASHLEY	In House	Pending	CHOLESTERO L	Triglycerides				
	7/2/2019	7/2/2019	195	TEST, ASHLEY	In House	Pending	CHOLESTERO L	HDL				
	7/2/2019	7/2/2019	195	TEST, ASHLEY	In House	Pending	CHOLESTERO L	LDL				
	7/3/2019	7/3/2019	203	TEST, KRISTIN	In House	Pending	CBC	CBC	Pending			

5. The following actions can be done from the grid.

- Columns added are removed using the Column Selector button.
- Information in the columns can be filtered using the filter button.
- Report can be grouped by moving a column to the group bar.
- View the lab in the chart by selecting the Patient button.

6. (Optional) Click the **Print** button to print the Review Date Range report.

Version 20.14

Overview

In this article you will learn how to review and complete open lab requisitions. In addition, you will be introduced to how to monitor

the diagnostic tests and perform follow up. The user will be shown optional settings to ensure all open diagnostic tests are addressed.

Review and Complete Lab Requisitions

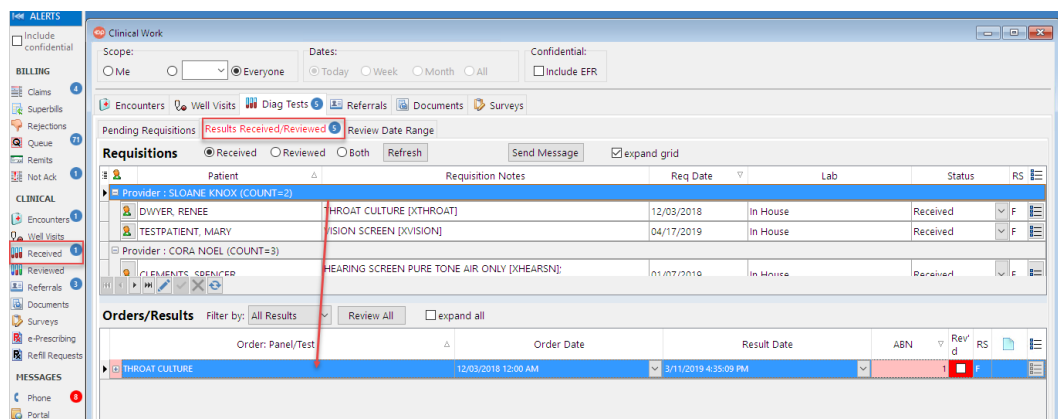
1. Click the **Received** button in the Main Navigation panel. The Clinical Work window is displayed.

Note:



- To view Diagnostic tests for other users, select the **User** from the drop-down menu or click the Everyone radio button in the Scope field.
- The dates field is unavailable to change and **All** is selected. This allows you to see all requisitions including those with a status of Partial.

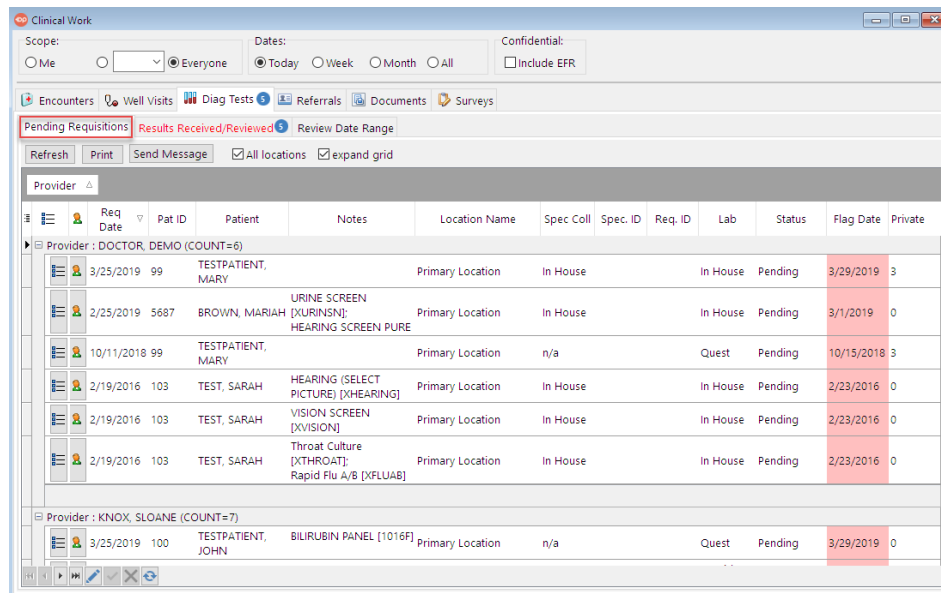
2. Highlight a **Patient** in the Requisitions panel, the test results are displayed in the **Orders/Results** panel.



3. Select the **Expand All** checkbox so all results, for the selected lab requisition, are displayed.
4. Select the Reviewed (**Rev'd**) checkbox on each order.
or
Click the **Review All** button to mark all results as reviewed.
5. Repeat the above steps to review all lab requisitions.
6. Complete the lab requisition.
 - Select the **Reviewed** radio button in the Requisitions panel.
 - Select an **Option** from the Status drop-down menu. To finalize the requisition select **Informed** or **Complete**.
 - Repeat the steps to finalize all requisitions.

Reviewing Open Lab Requisitions

1. Click **Reviewed** or **Received** in the Main Navigation panel. The Clinical Work window is displayed.
2. Click the **Pending Requisitions** tab.



Clinical Work

Scope: ☐ Me ☐ Everyone ☒ Today ☐ Week ☐ Month ☐ All ☐ Confidential: ☐ Include EFR



Encounters Well Visits Diag Tests Referrals Documents Surveys

Pending Requisitions Results Received/Reviewed Review Date Range

Refresh Print Send Message ☒ All locations ☒ expand grid

Provider

Req Date	Pat ID	Patient	Notes	Location Name	Spec Coll	Spec ID	Req ID	Lab	Status	Flag Date	Private
Provider: DOCTOR, DEMO (COUNT=6)											
3/25/2019	99	TESTPATIENT, MARY		Primary Location	In House			In House	Pending	3/29/2019	3
2/25/2019	5687	BROWN, MARIAH	URINE SCREEN [XURINSN]; HEARING SCREEN PURE	Primary Location	In House			In House	Pending	3/1/2019	0
10/11/2018	99	TESTPATIENT, MARY		Primary Location	n/a			Quest	Pending	10/15/2018	3
2/19/2016	103	TEST, SARAH	HEARING (SELECT PICTURE) [XHEARING]	Primary Location	In House			In House	Pending	2/23/2016	0
2/19/2016	103	TEST, SARAH	VISION SCREEN [XVISION]	Primary Location	In House			In House	Pending	2/23/2016	0
2/19/2016	103	TEST, SARAH	Throat Culture [XTHROAT]; Rapid Flu A/B [XFLUAB]	Primary Location	In House			In House	Pending	2/23/2016	0
Provider: KNOX, SLOANE (COUNT=7)											
3/25/2019	100	TESTPATIENT, JOHN	BILIRUBIN PANEL [1016F]	Primary Location	n/a			Quest	Pending	3/29/2019	0

Element	Description
	Review Requisition
	Go to patient chart
Req Date	Date Lab Requisition created
Pat ID	Patient Account ID
Patient	Patient name
Notes	Lab test Notes
Location Name	Lab Location
Spec Coll	Where specimen was collected
Spec ID.	Optional ID fields for Specimen
Req. ID	Optional ID fields for Requisition
Lab	Lab name
Status	Status of lab requisition
Flag Date	Date flagged for results to be returned
Private	Privacy Level indication



Note: Click the **Print** button to print the full list of Pending Requisitions.

Reviewing the Date Range

1. Click **Reviewed** or **Received** in the Main Navigation panel. The Clinical Work window is displayed.
2. Click the **Review Date Range** tab.
3. The Start date and End date will default to 1 week. To change, click the **drop-down menu** and select an **option** from the calendar.
4. Click the **Refresh** button.

Pending Requisitions															Results Received/Reviewed		Review Date Range	
Start date: 7/1/2019		End date: 8/7/2019		Refresh		Print		<input type="checkbox"/> highlighted item only		<input checked="" type="checkbox"/> expand grid								
Provider																		
2	Lab Req Date	Result Date/Time	Pat ID	Patient	Lab	Status	Order: Panel/Test	Result Test Name	Result	Abnl Flag	Req Spec ID	Result Spec ID	Lab Req ID	Ref. Range	Result Note	Location Name		
9	Provider: An Administrator (COUNT=19)																	
	7/2/2019	7/2/2019	195	TEST, ASHLEY	In House	Pending	CHOLESTEROL	Total Cholesterol								Primary Location		
	7/2/2019	7/2/2019	195	TEST, ASHLEY	In House	Pending	CHOLESTEROL	Triglycerides								Primary Location		
	7/2/2019	7/2/2019	195	TEST, ASHLEY	In House	Pending	CHOLESTEROL	HDL								Primary Location		
	7/2/2019	7/2/2019	195	TEST, ASHLEY	In House	Pending	CHOLESTEROL	LDL								Primary Location		
	7/9/2019	7/9/2019	203	TEST, KRISTIN	In House	Pending	CBC	CBC	Pending							Primary Location		

5. The following actions can be done from the grid.

- Columns added are removed using the Column Selector button.
- Information in the columns can be filtered using the filter button.
- Report can be grouped by moving a column to the group bar.
- View the lab in the chart by selecting the Patient button.



Note: If a practice needs to print pending lab requisitions the Review Date Range report must be used. The Status column needs to be filtered to Pending. Once the filter is set, click the **Print** button.