

# *eClinicalWorks*



## **Bidirectional Interface Training Manual (eClinicalWorks v. 9.0)**

**eClinicalWorks  
112 Turnpike Road  
Westborough, MA 01581**

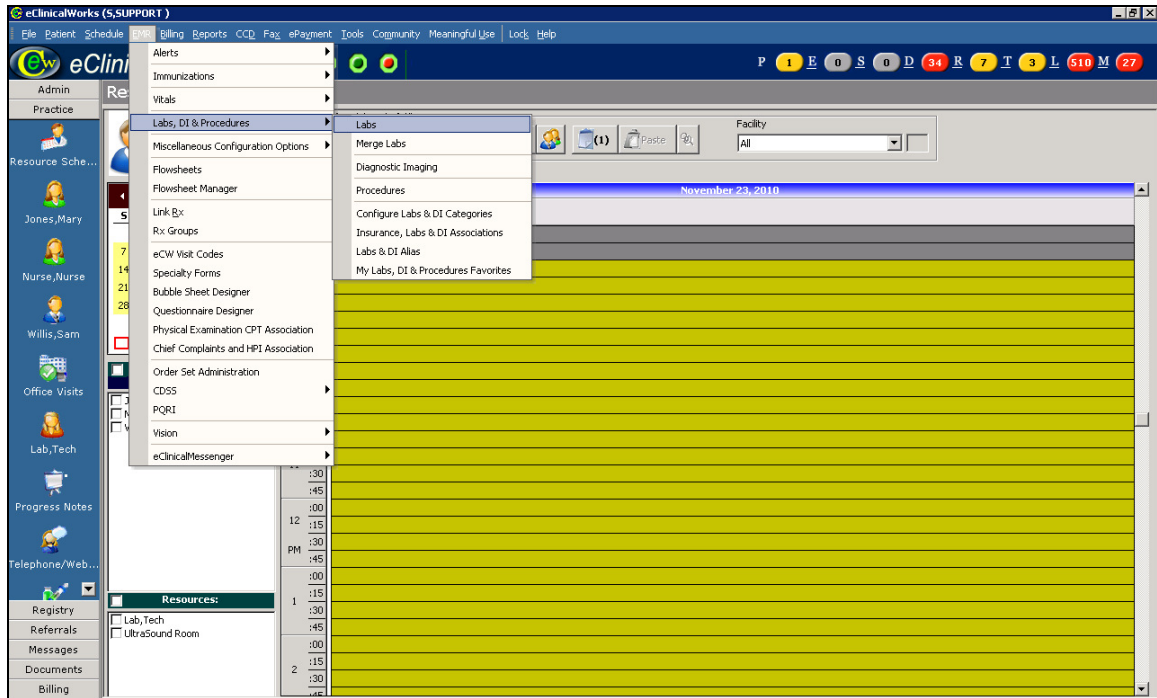
**Interfaces Division**

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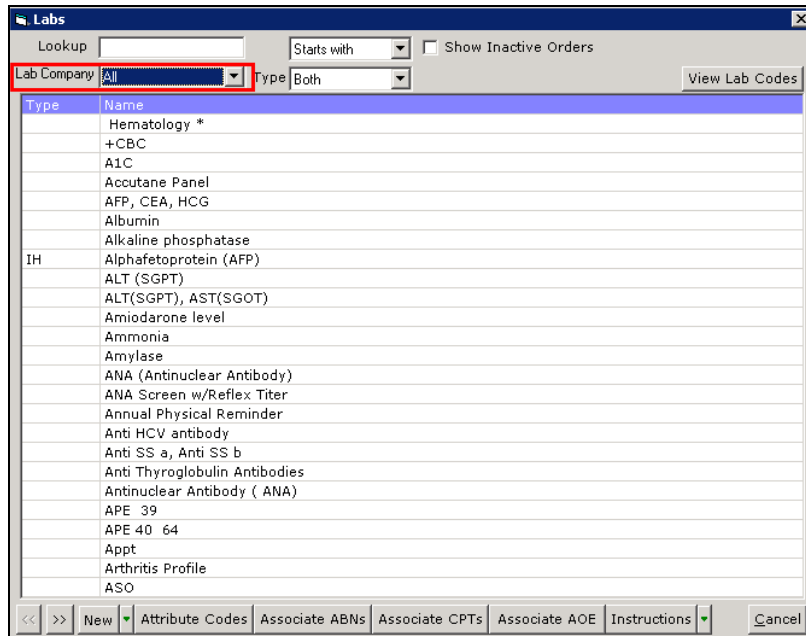
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## Adding a New Test in the Test Dictionary

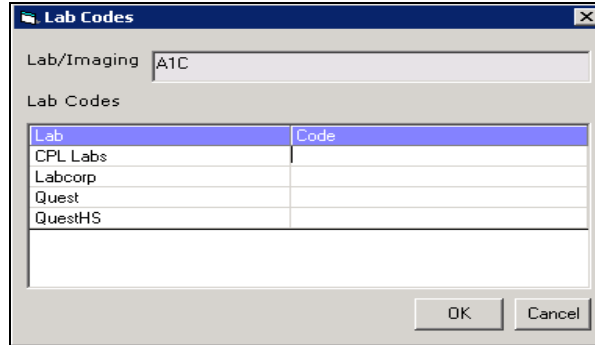
1. While ordering a lab, we need to make sure that the test has a code. To check for code you can go to EMR->Labs, DI & Procedures -> Labs.



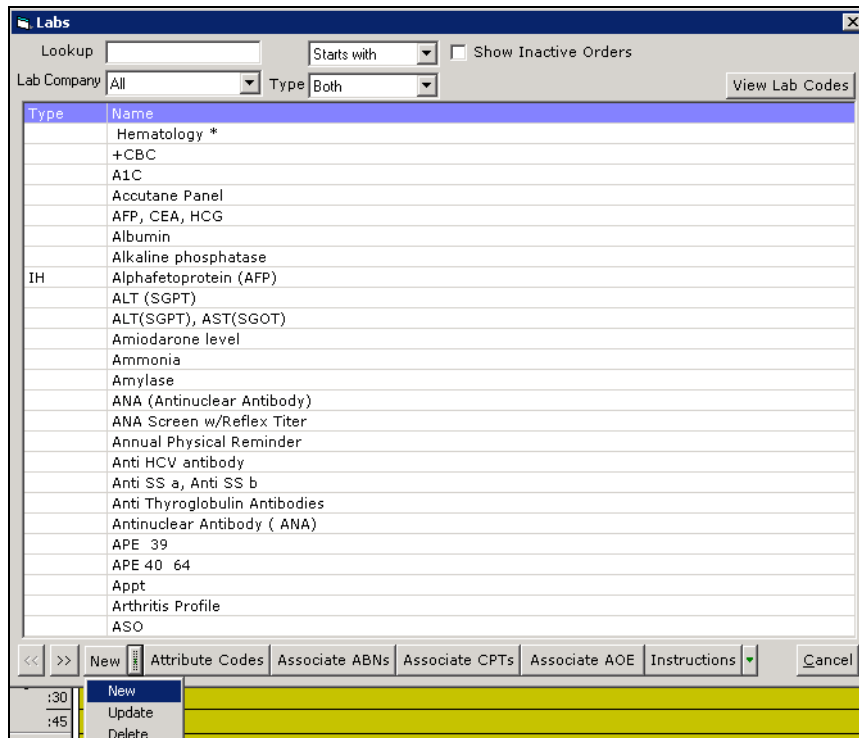
2. Select the lab company from the drop down and type in the test you are looking for. Then, click on View Lab Codes.



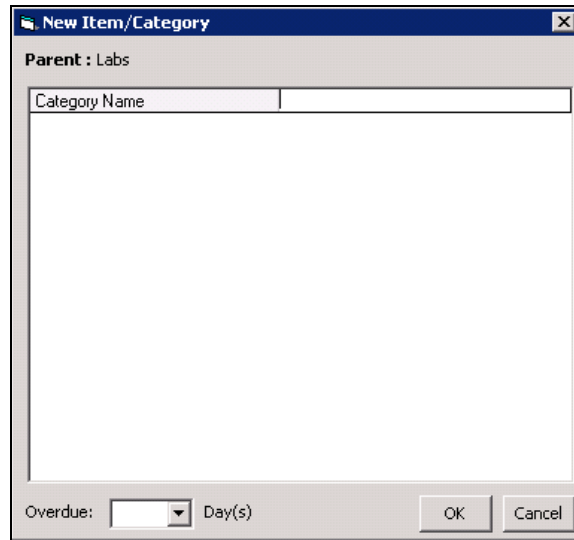
3. Enter the code provided by the lab corresponding to the lab name in the Code column.



4. If you do not see a lab test you want in the labs list, you can create one. To create a new lab click on 'New'.

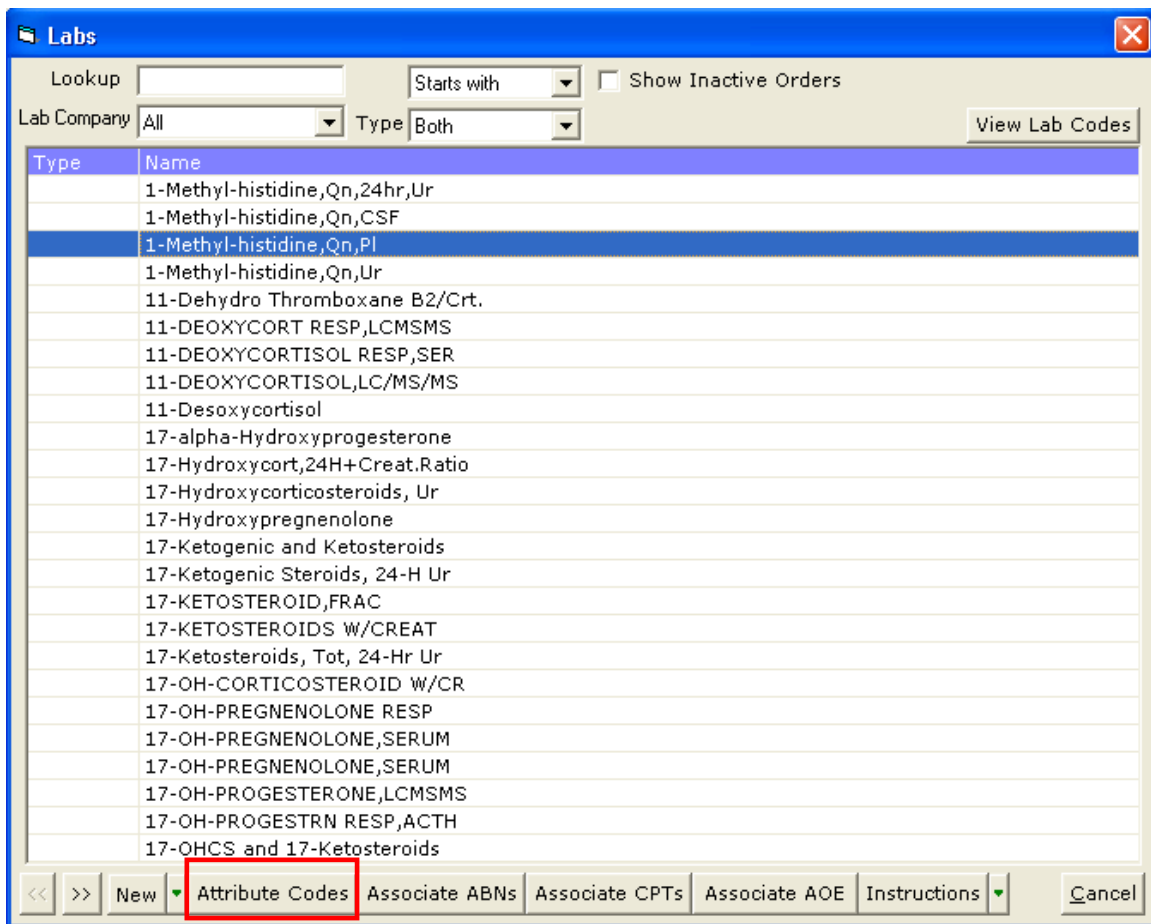


Enter the name of the test next to 'Category Name'. After adding the Lab Name, follow through Steps 1 to 3 above to add the code.

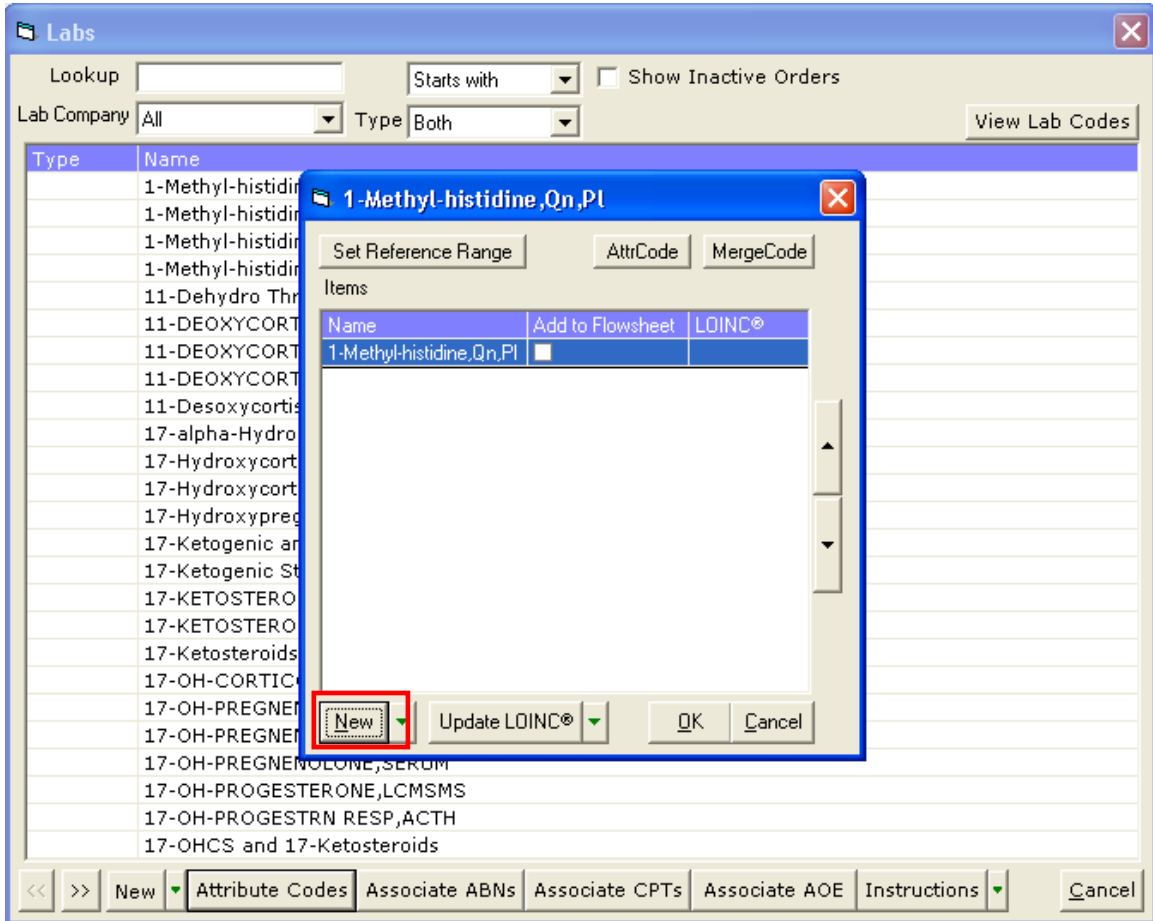


## Adding Attributes in the Test Dictionary

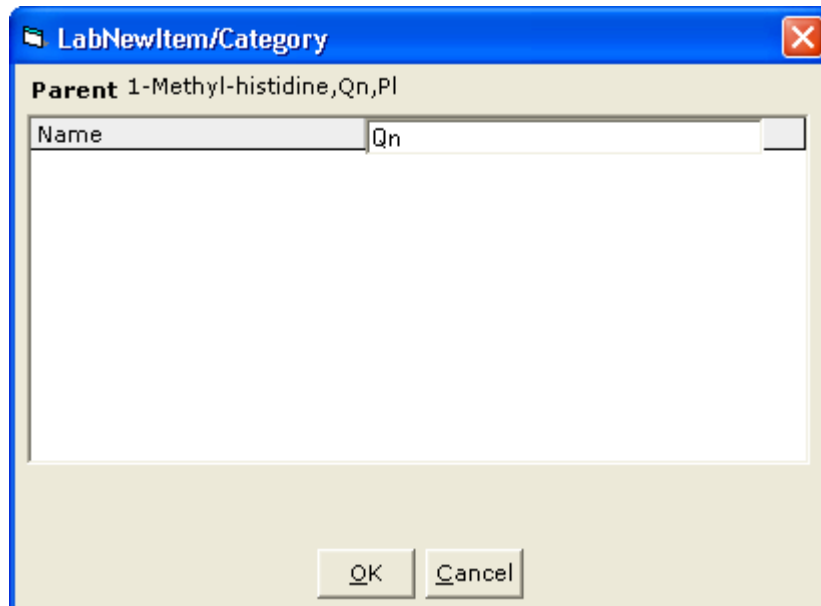
To add attributes to an existing test, select the test from EMR->Labs, DI & Procedures -> Labs. Highlight the test and click on 'Attribute Codes'.



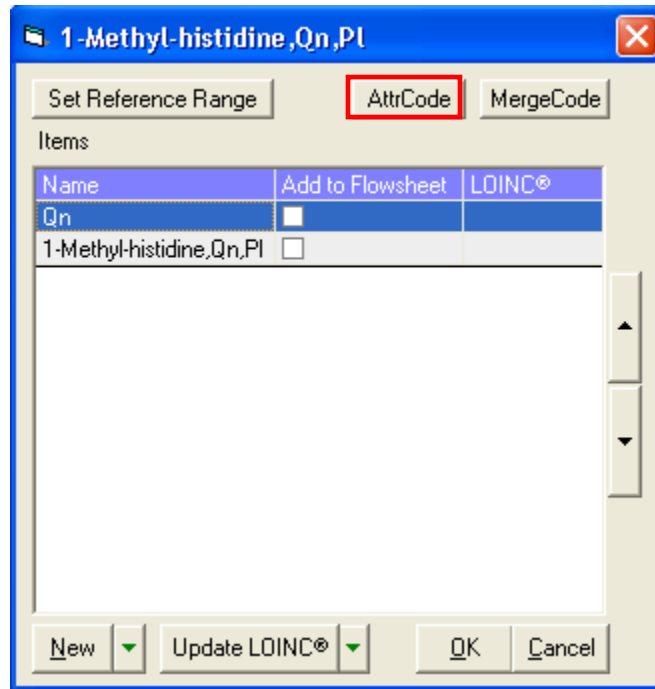
The attribute screen will open up. To add the attribute, click on 'New'.



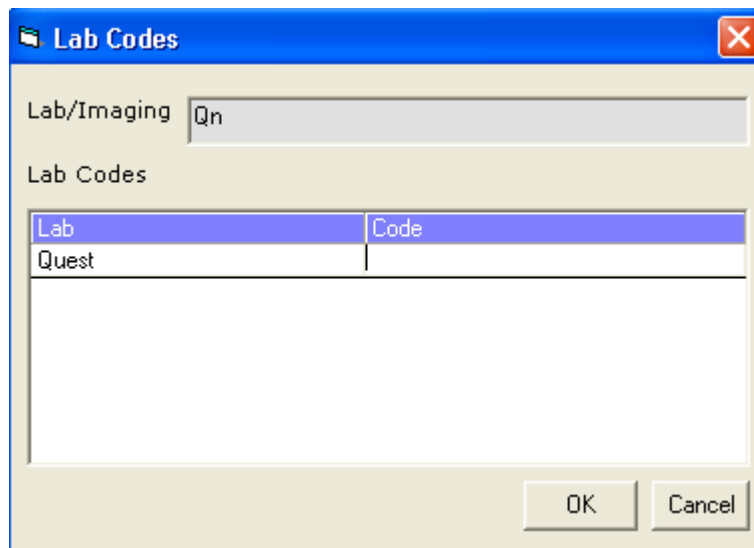
Type in the attribute name and click on OK. The attribute has now been created.



To add the attribute code for that attribute, select the attribute and click on 'AttrCode'.

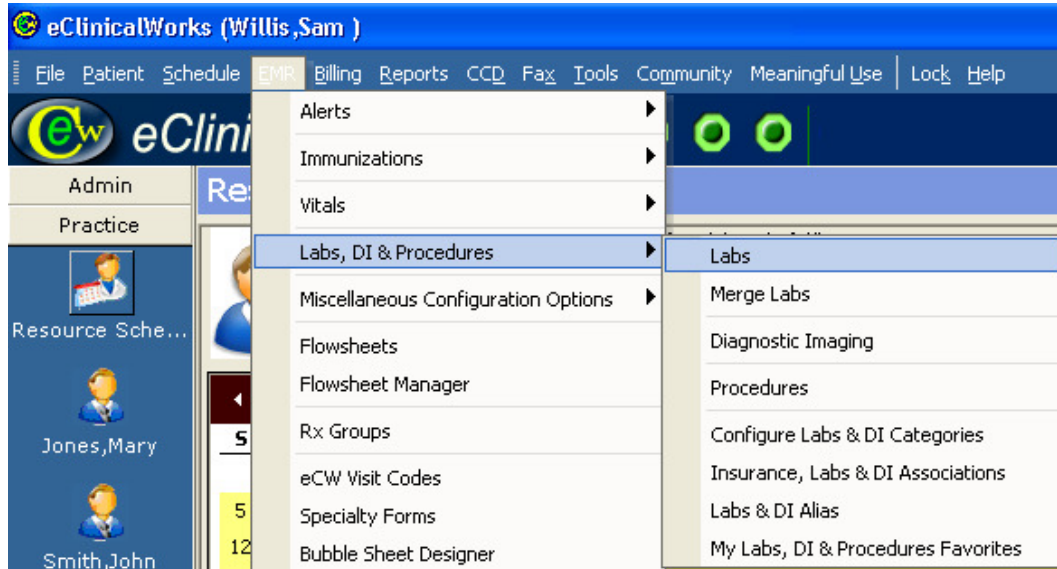


Select the lab company from the lab list and enter the attribute code in the 'Code' column. Click OK.

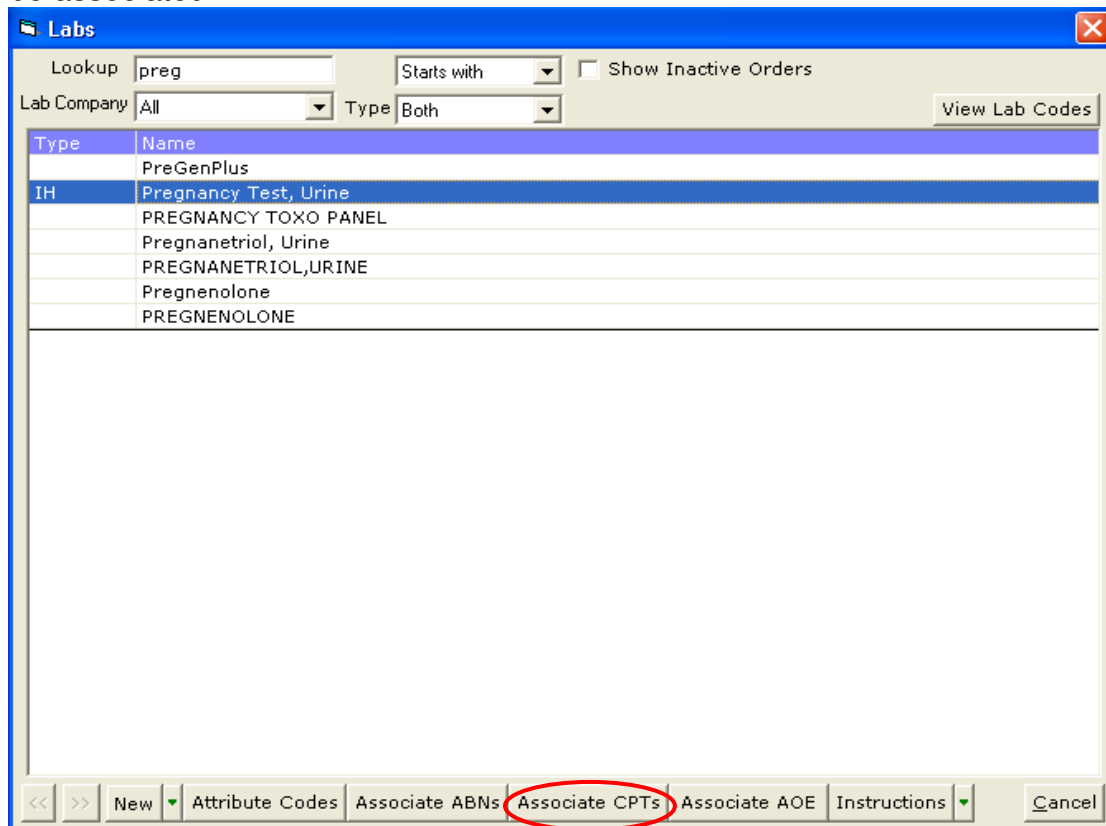


## Associating CPT

CPT can be associated for in-house labs so that when that test is ordered by the provider for a patient it automatically adds the associated CPT to the Billing section of the progress note. To associate the CPT to a lab go to EMR->Labs, DI & Procedures->Labs.



This opens the Lab screen. Then lookup for the lab for which the CPT needs to be associated.





Highlight the lab and click Associate CPTs at the bottom. You can also double click on the lab to associate CPT.

Associate CPTs

Lab Code

Name: Pregnancy Test, Urine

InHouse      Midmark Item: [Dropdown]

Inactive

Do Not Publish to Portal

Associated CPT(s)

[Add] [Remove]

CPT	Name
-----	------

[OK] [Cancel]

Then Click on Add and select the CPT that needs to be associated with that lab and press OK. The selected CPT would appear below the Associated CPT(s) as shown below. More than one CPT can also be associated to the same lab by clicking on Add and adding additional CPTs as needed.

Associate CPTs

Lab Code

Name: Pregnancy Test, Urine

InHouse      Midmark Item: [Dropdown]

Inactive

Do Not Publish to Portal

Associated CPT(s)

[Add] [Remove]

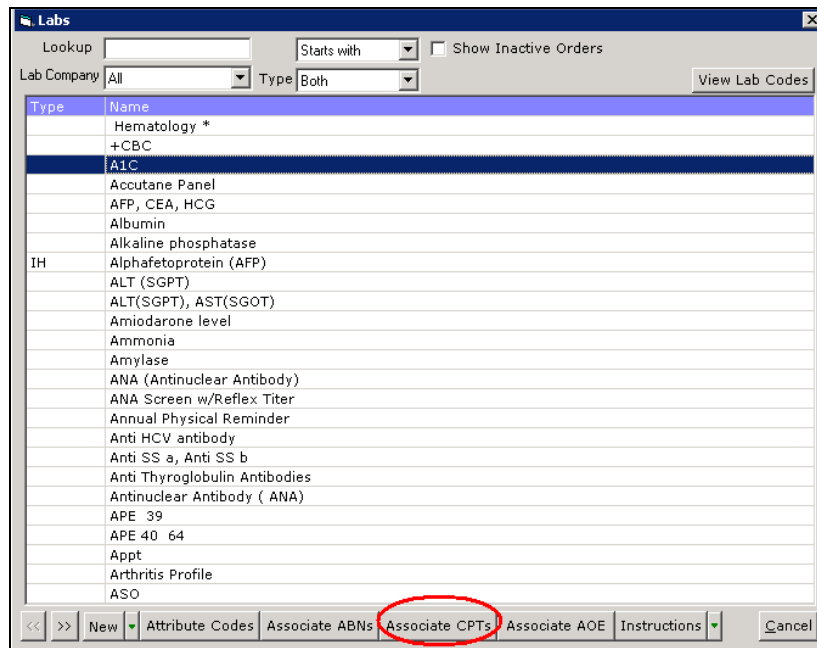
CPT	Name
81025	URINE PREGNANCY TEST

[OK] [Cancel]

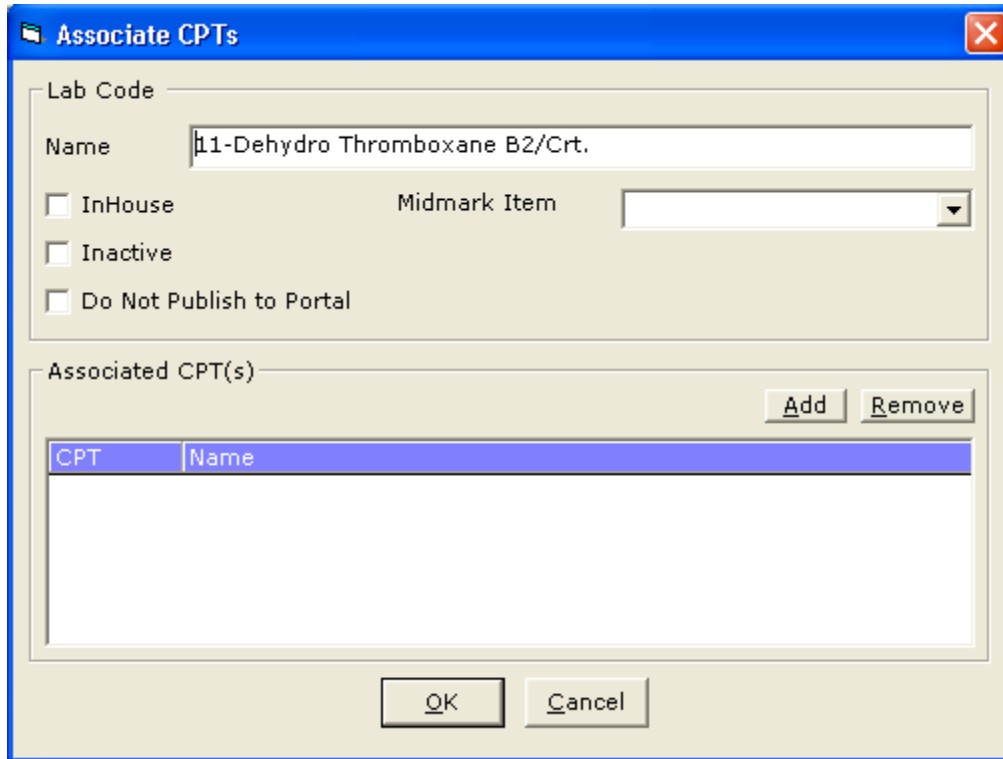
Once the necessary CPT codes are associated, press OK to close the 'Associate CPTs' window.

## Inactivating Tests

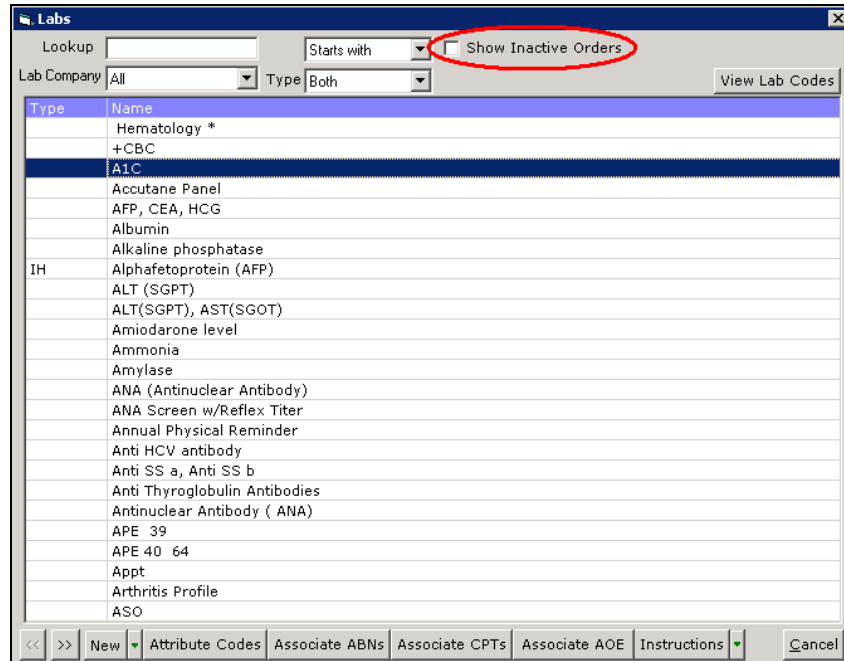
In order to inactive tests so that they do not appear in the test dictionary as an orderable test, go to EMR->Labs, DI & Procedures->Labs and double click on the test you want to inactive or highlight the test and click on 'Associate CPTs.'



The following screen will pop up. Check the 'Inactive' box and hit OK. The test will no longer appear in the test dictionary.



In order to see the inactive labs display, click on 'Show Inactive Orders.'



The inactive tests will now display but will be grayed out.

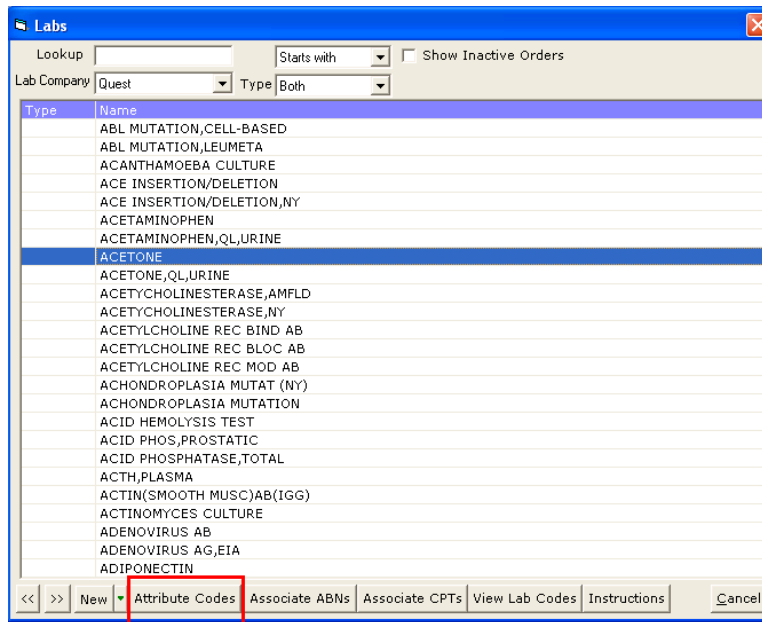
**NOTE:** Inactivating tests does not delete the tests off the patients' records. It only removes the tests from the orderable labs list.

## LOINC Codes

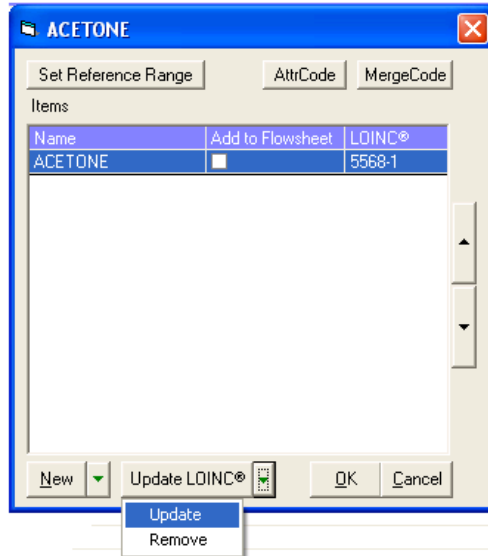
In eClinicalWorks version 8.0, LOINC codes can be entered. LOINC stands for *Logical Observations Identifiers, Names, Codes*. The LOINC laboratory terms set provides a standard set of universal names and codes for identifying individual laboratory and clinical results. LOINC codes allow users to merge clinical results from many sources into one database for patient care, clinical research, or management.

In eClinicalWorks, LOINC codes are NOT used in any interface transactions. They are loaded as a mapping in the compendium to uniquely identify the result components from many different sources. These mappings are then used to run Clinical Decision Support System (CDSS) and various different reports in eClinicalWorks.

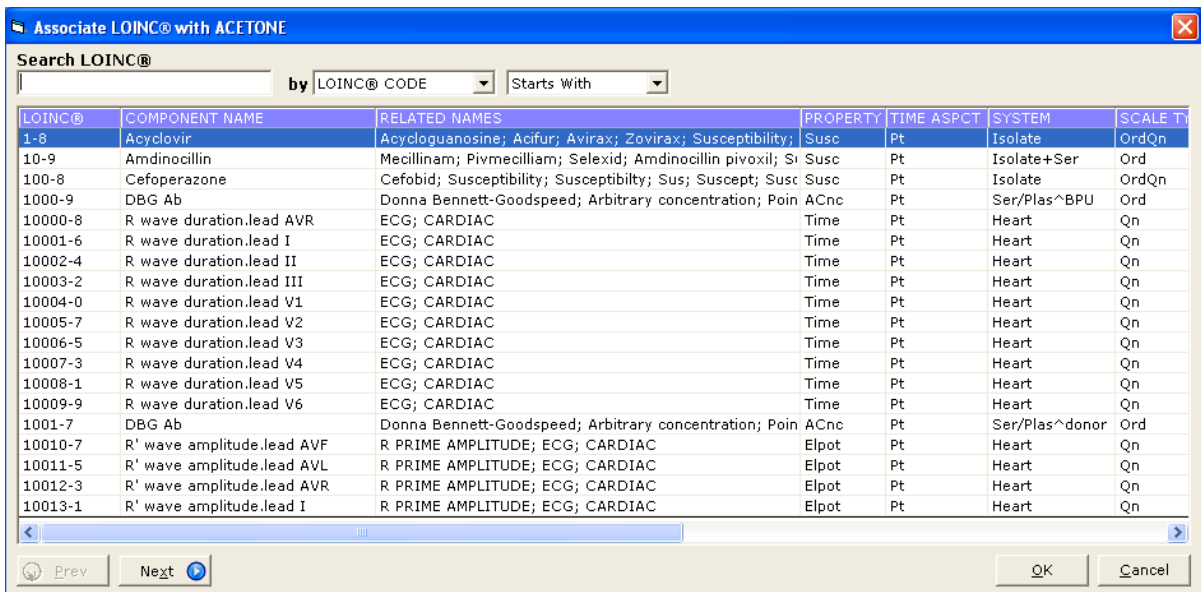
To add/edit/view LOINC codes, go to EMR->Labs. Select a lab and click on Attribute Codes.



The LOINC code will be displayed in the 'LOINC' column.



To update the LOINC code, click on the 'Update LOINC' dropdown. The screen below will display. You can now select the relevant LOINC code and click on OK.



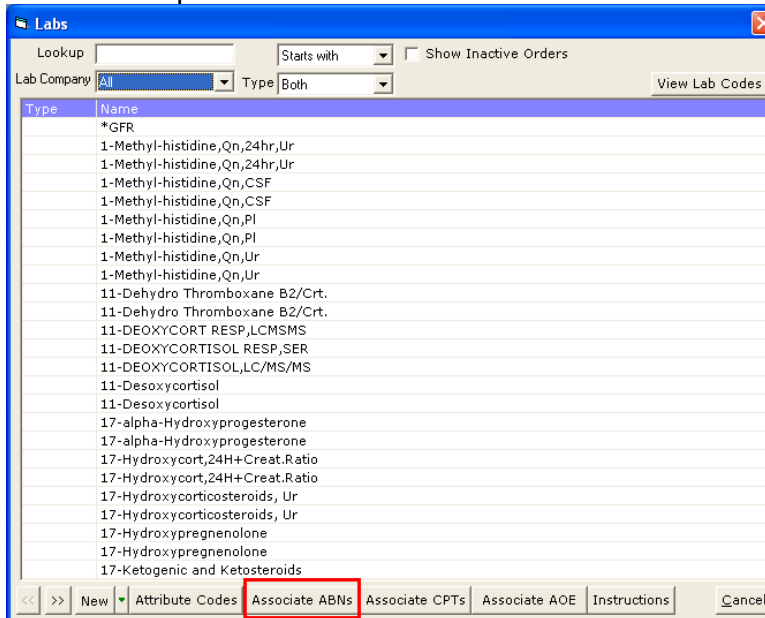
## Associating ABNs (Advanced Beneficiary Notice) to Tests

The Advanced Beneficiary Notice associates the type of coverage for a particular test for Medicare patients with payment source type C, MB, or MA, if Medicare is the primary insurance for a patient. The ABN prompts a notice if a particular test may not be covered by Medicare.

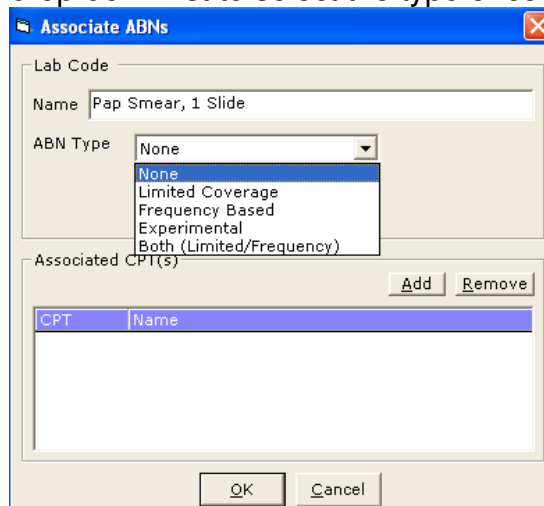
### To associate a coverage type to a test:

1. From the EMR menu, select Labs from the 'Labs, DI, & Procedures' option. The Labs window opens.

2. Select the lab name and click Associate ABNs. The Lab Codes window opens.



3. Use the ABN Type drop-down list to select the type of coverage:



- **Limited:** An ABN will be prompted if the mapping of the selected diagnosis codes for this visit and the CPT code for this test are not in the cpticdcodes table. If a valid mapping exists in this table, the ABN will not be prompted. (**NOTE:** ABN does not work with the CPT-ICD mappings from the application menu).
- **Frequency:** Some frequent tests may not be covered by Medicare, and an ABN appears each time this type of test is ordered.
- **Experimental:** A test might be considered experimental by Medicare, and an ABN appears each time this type of test is ordered.
- **Both:** (Limited/Frequency): An ABN appears each time both of these types of test is ordered.

4. Associate a valid CPT code with the test. Each test has a unique CPT code. This will be verified with the associated ICDs for the visit.

The screenshot shows a window titled "Fee Schedule" with a search bar containing "pl". The window has a checkbox for "Show Invalid CPT/HCPCS Codes" which is checked. Below the search bar are dropdown menus for "All Codes", "Active", and "Masshealth". The main area is a table with columns: Code, Name, Fee, Cost, POS, TDS, M1, M2, M3. The table lists various CPT codes such as V2430, V2499, T4529, T2007, C1300, S4026, S4030, S4031, S4035, S9529, L5331, D6761, D6609, D6612, D6613, D6614, D6750, G0302, and L0140, all with a fee of \$0.00 and a cost of \$0.00. At the bottom of the window are buttons for "< Prev", "Next >", "Customize", "Apply", "OK", and "Cancel".

Code	Name	Fee	Cost	POS	TDS	M1	M2	M3
V2430	PACEMKR MON CHCK BATTERY AUI	\$0.00	\$0.00					
V2499	PACEMKR MON CHCK BATTERY DIX	\$0.00	\$0.00					
T4529	PAD FOR WATER CIRCULATING H	\$0.00	\$0.00					
T2007	PAIL OR PAN USE WITH COMMOD	\$0.00	\$0.00					
C1300	PALATE/UVULA SURGERY	\$0.00	\$0.00					
S4026	PALATL AUG PROSTH SEE CODE Z	\$0.00	\$0.00					
S4030	PALATL LIFT PROSTH DFNTV COD	\$0.00	\$0.00					
S4031	PALATL LIFT PROSTH INTRM CODI	\$0.00	\$0.00					
S4035	PALATL LIFT PROSTH MOD CODE	\$0.00	\$0.00					
S9529	PALLIATIVE TX DENTAL PAIN-MINC	\$0.00	\$0.00					
L5331	PANCA/CANCA	\$0.00	\$0.00					
D6761	PANCREAS SURGERY PROCEDURE	\$0.00	\$0.00					
D6609	PANCREATECTOMY	\$0.00	\$0.00					
D6612	PANCREATECTOMY	\$0.00	\$0.00					
D6613	PANCREATECTOMY	\$0.00	\$0.00					
D6614	PANCREATECTOMY	\$0.00	\$0.00					
D6750	PANCREATORRHAPHY	\$0.00	\$0.00					
G0302	PANORAMIC X-RAY OF JAWS	\$0.00	\$0.00					
L0140	PAPER CHROMATOGRAPHY	\$0.00	\$0.00					

5. After all CPT codes are selected, click OK.

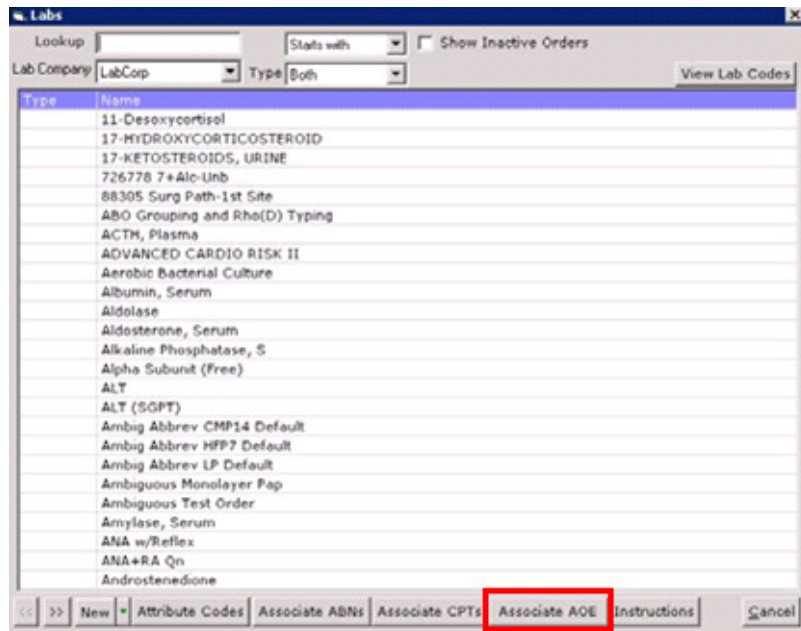
The setup for the Advanced Beneficiary Notice is complete for the lab.

## Associating AOE (Ask-at-Order-Entry) questions to Tests

In many instances, the AOE are given by the lab company and uploaded during the install. When the specific tests are ordered, the AOE automatically pop up.

If you would like to create or add new AOE for specific tests, go to EMR -> Labs, DI, & Procedures -> Labs. Select the Lab test you want to configure AOE for and click the Associate AOE button:

**NOTE:** The test must be linked to an interface in order to associate an AOE



The Configure Ask at Order Entry Questions window opens:

The screenshot shows the 'Configure Ask at Order Entry Questions for - TSH' window. It includes a title bar, a header with 'TSH' and buttons for 'Associated AOE', 'Add New', and 'Modify Existing'. Below is a form with fields for 'LAB COMPANY' (set to 'LabCorp'), 'Question', 'Question Code', 'Hints', 'Required' (set to 'No'), 'Maximum Characters' (set to '0'), 'Field Type' (set to 'Drop Down Options'), and 'Options/Option Codes'. There are also buttons for 'Add new Option' and 'Delete selected'. At the bottom, there are 'Save' and 'Cancel' buttons and a note: '\* indicates required fields'.



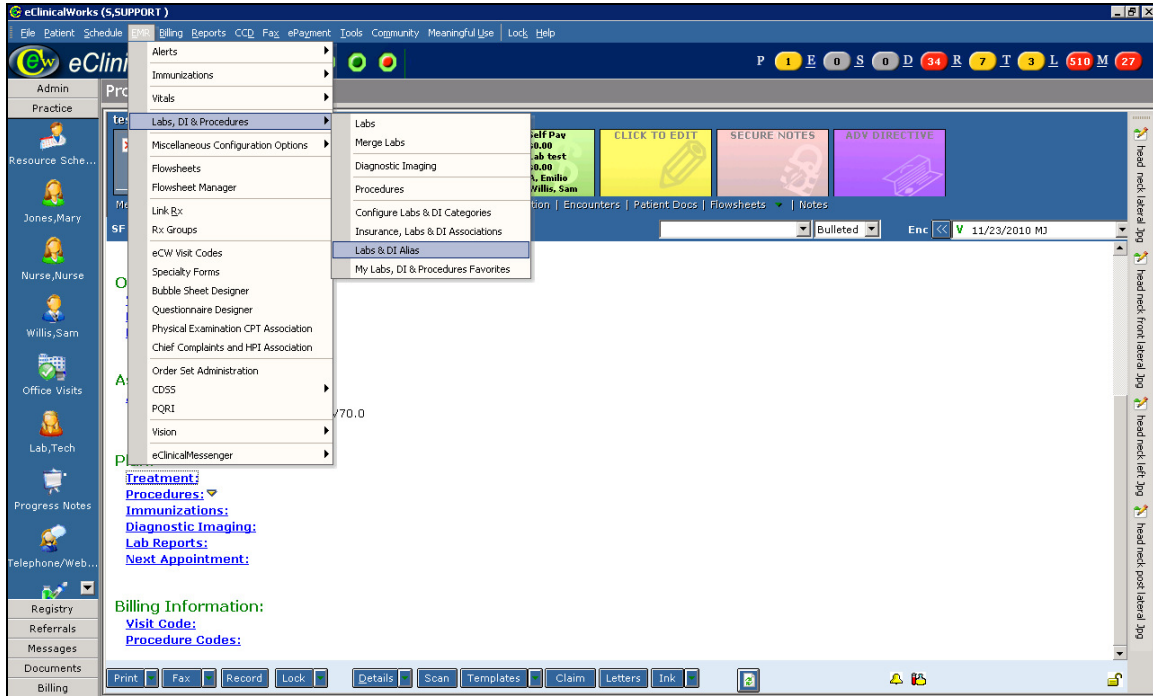
Select the lab company used for this test from the Lab Company drop-down list and follow these steps:

1. Click the 'Add New' tab to add a new question, or click the 'Modify' button next to an existing question to modify it. Options to configure a new questions display.
2. Enter the desired question in the Question field.
3. If applicable, enter a question code in the Question Code field.
4. If desired, enter any hints in the Hints field.
5. Select whether answering this question is mandatory or not from the Required drop-down list.
6. Enter the number of maximum characters in an acceptable answer in the Maximum Characters field.
7. Select one of the following types of options from the Field Type drop-down list:
  - **Free Text** - Select this option if you want providers to answer this question with any manually-typed text.
  - **Standard Text with Validation** - Select this option if you want providers to answer this question with a specific type of text. If you select this option, a Details drop-down list displays with the following options:
    - **Alphabets Only** - select this option if the expected answer contains only letters.
    - **Alpha-numeric** - select this option if the expected answer contains both letters and numbers.
    - **Date** - select this option if the expected answer is a date.
    - **Numbers Only** - select this option if the expected answer contains only numbers.
  - **Drop-Down Options** - Select this option if you want to provide specific options for providers to choose from. If you select this option, an Options/Option Codes field displays, allowing you to enter the text and a code for each of the desired options. Click the Add New Option button to add more options, and check the boxes next to all options you want to include for this question.
  - **Radio-Button Options** - Select this option if you want to display radio buttons for providers to choose from.

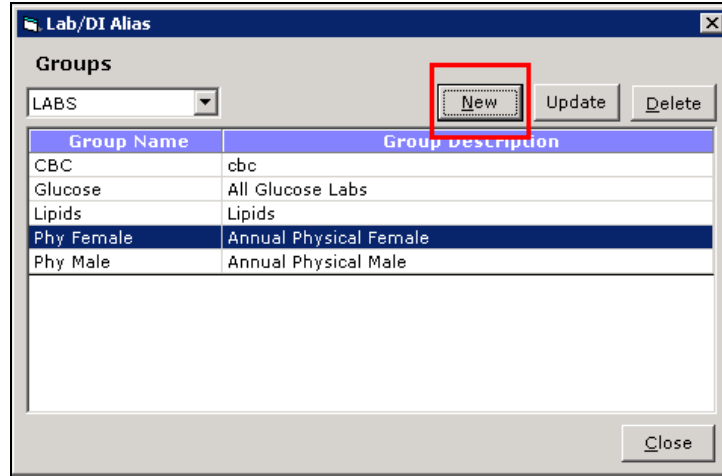
Click the Save button. An Ask at Order Entry Question is now configured.

# Configuring Labs Alias

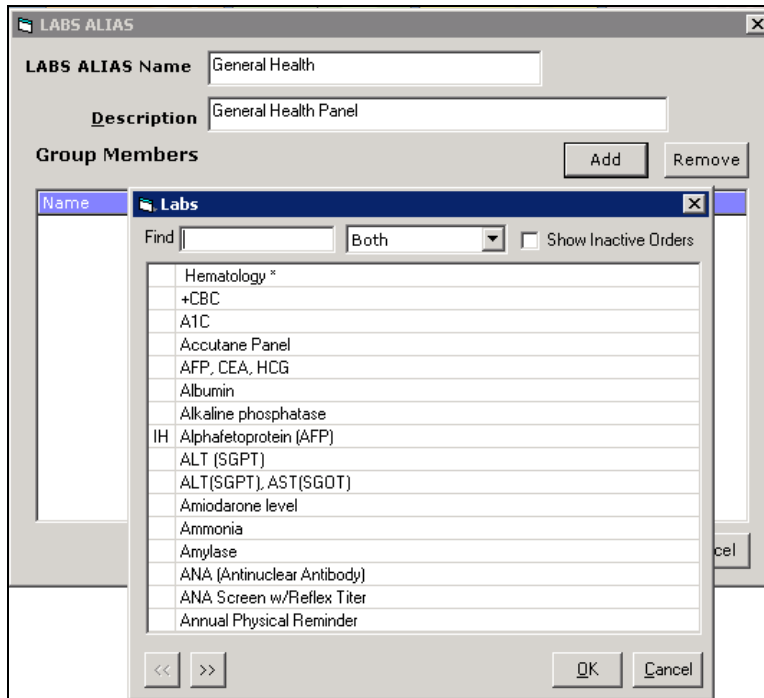
To group tests together while ordering, labs alias can be created. To setup an alias, go to EMR -> Labs, DI, & Procedures -> Labs & DI Alias.



To create a new alias, click on New and enter in a name and description.

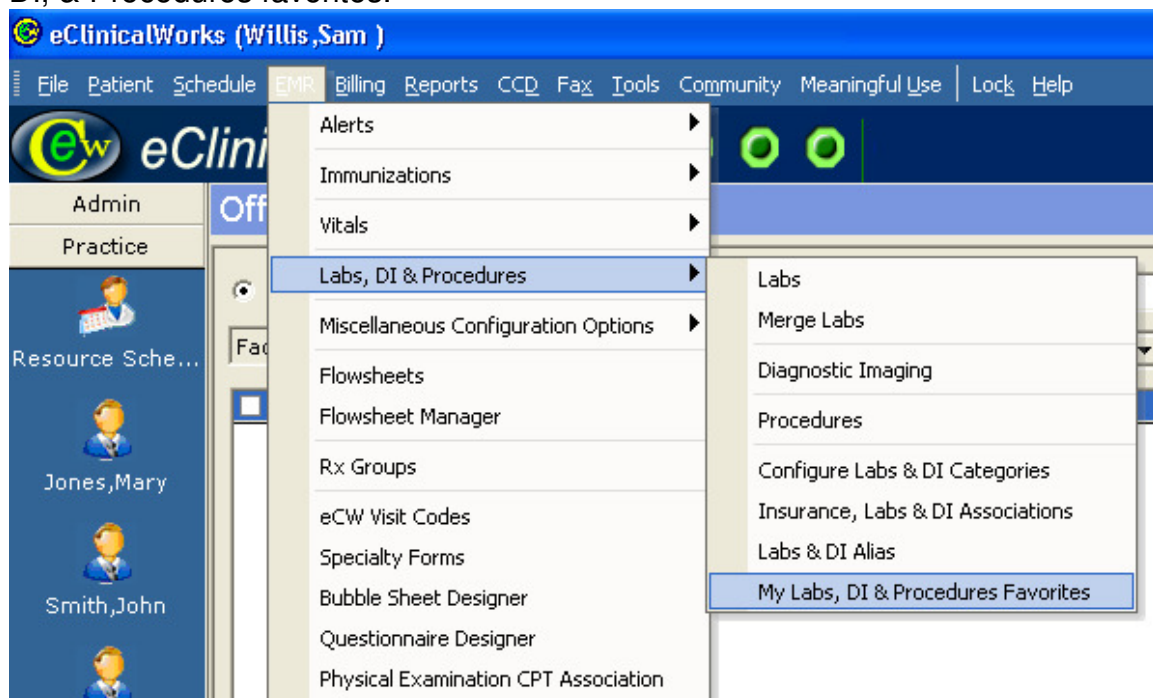


Then click on Add to select the tests associated with this alias.



## Configuring Labs, DI and Procedure Favorites

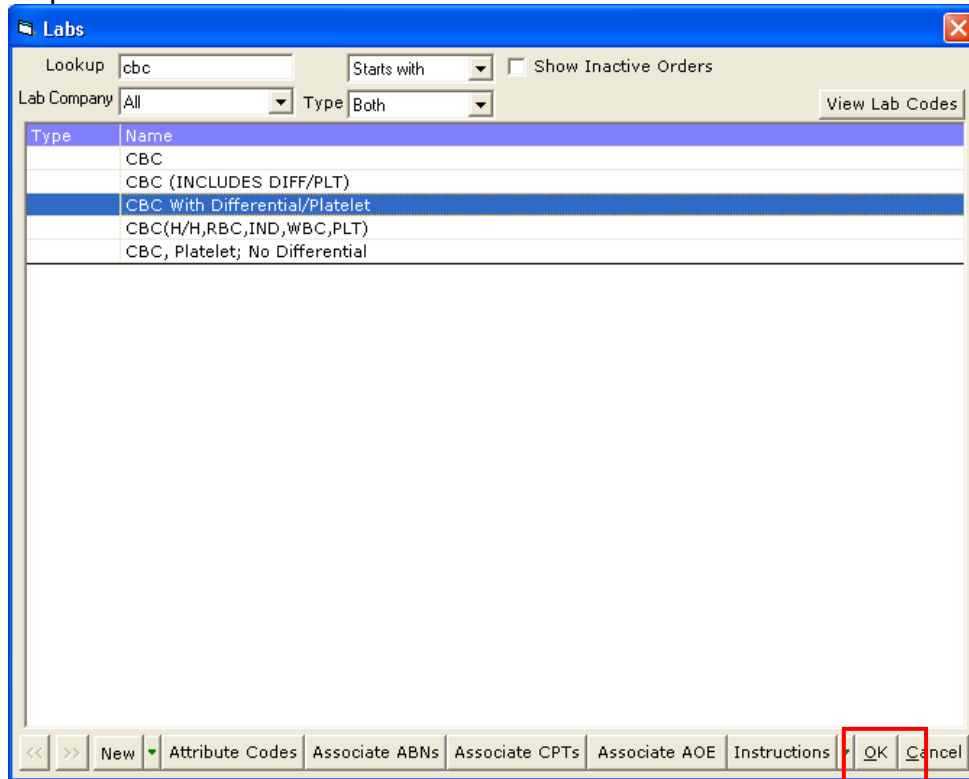
Each user has the ability to setup a list of their favorite labs, diagnostic imaging and procedures. To set it up go to EMR -> Labs, DI, & Procedures -> My Labs, DI, & Procedures favorites.



In order to make your own list of lab favorites select Add.

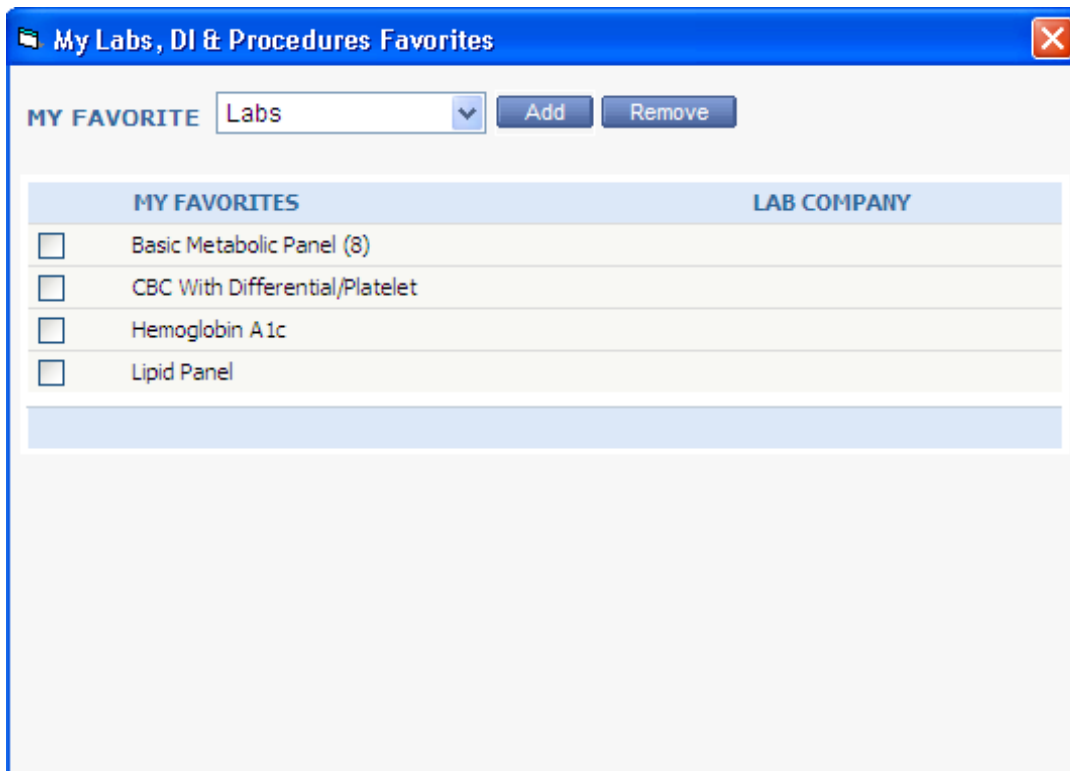


Lab lookup screen pops up. Then find the lab by typing the name of the lab under the lookup tab. Highlight the lab and press ok. "Lab Name' has been successfully inserted in my favorites" will pop up and then press OK. Repeat the same steps to add more than one lab to the favorite list.

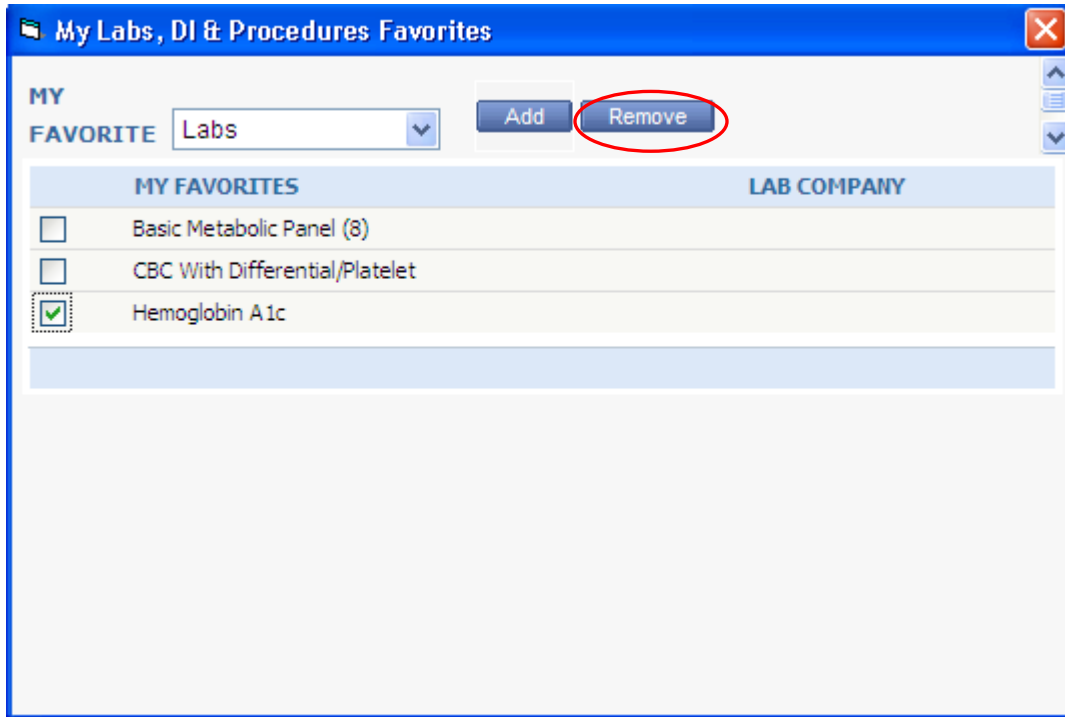




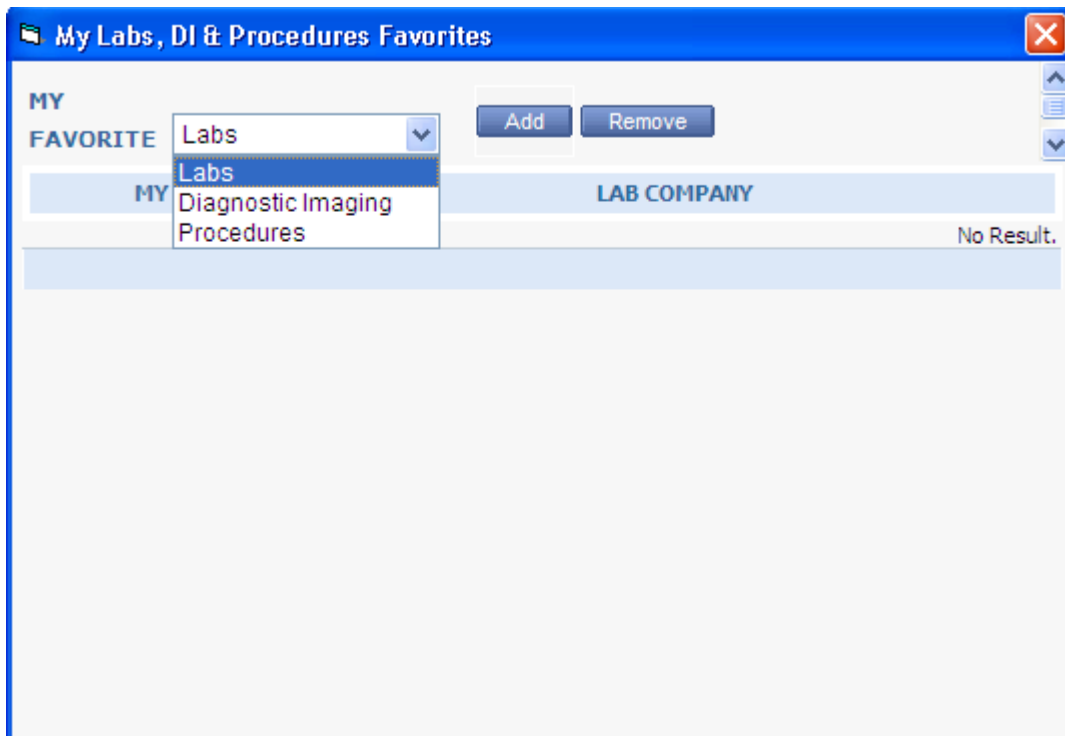
Once the all the labs are added, the My Labs, DI & Procedures Favorites screen looks like below.



If a lab needs to be removed from the favorite list, check the box corresponding to the lab to be removed and press 'Remove' as shown in the screenshot below.

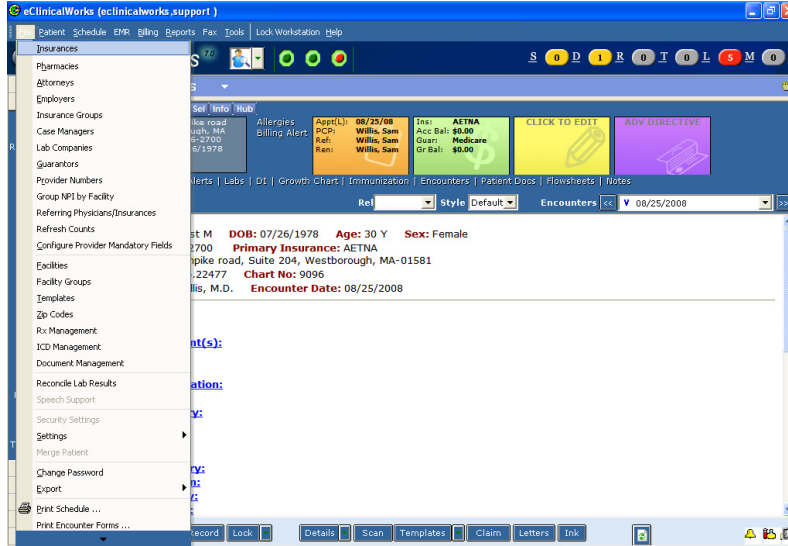


The users also have the ability to make their own DI and Procedure favorites similar to that of the Lab favorites. To do so, from the 'My Labs, DI & Procedure Favorites' click on the drop down to switch among Labs, Diagnostic Imaging or Procedures and press Add to make your favorite list.

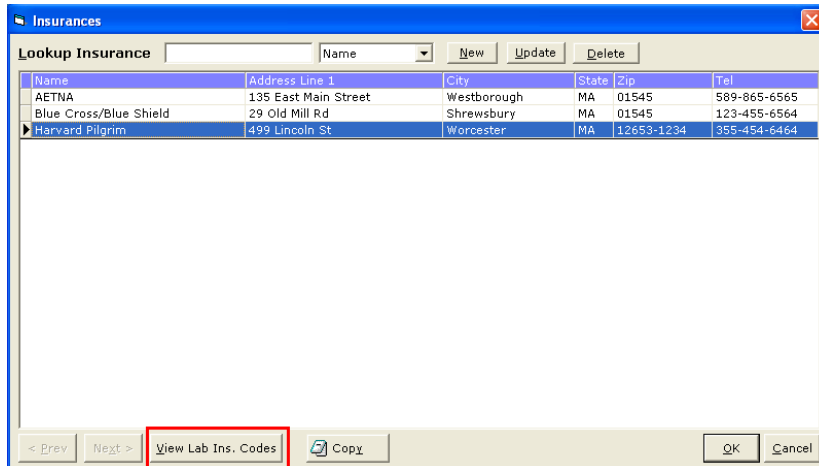


## Adding a New Insurance Code in Insurances

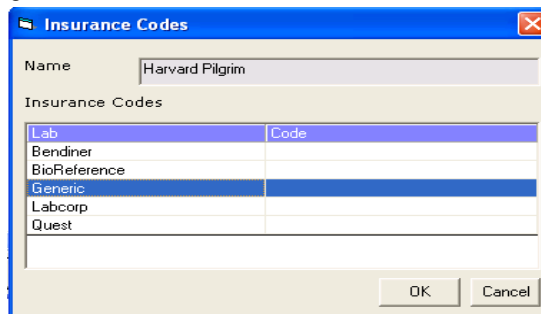
If a new insurance is added, its corresponding carrier code must be added as well. The lab company can provide this code. To enter this code, go to File -> Insurances.



Select the new insurance and click on 'View Lab Ins. Codes'



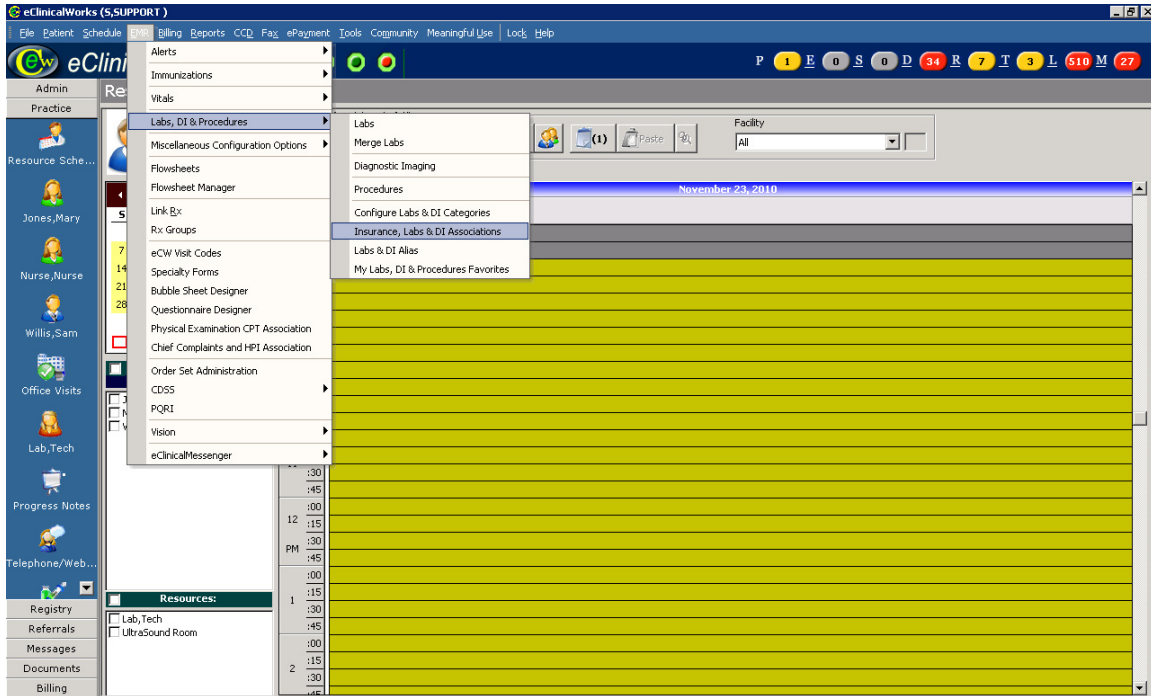
Enter the code provided by the lab corresponding to the lab name by double clicking in the Code column.



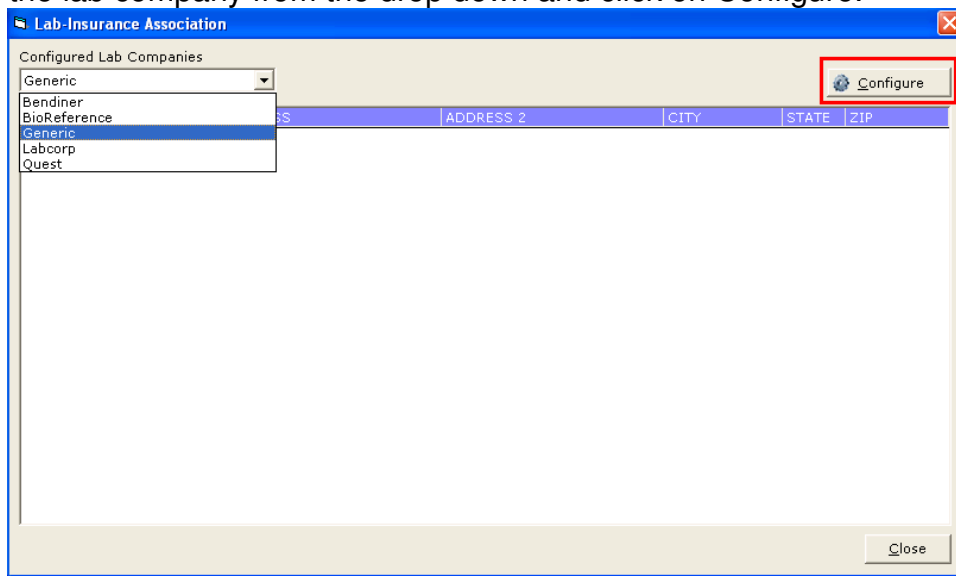
# Insurance/Lab Associations

Based on a patient's insurance, the associated lab tests can be displayed automatically for you to order in the 'Lab Reports' screen if the insurance has been linked to the specific lab company.

To configure this Insurance/Lab Association, go to EMR-> Labs, DI, & Procedures -> Insurance/Lab/DI Associations

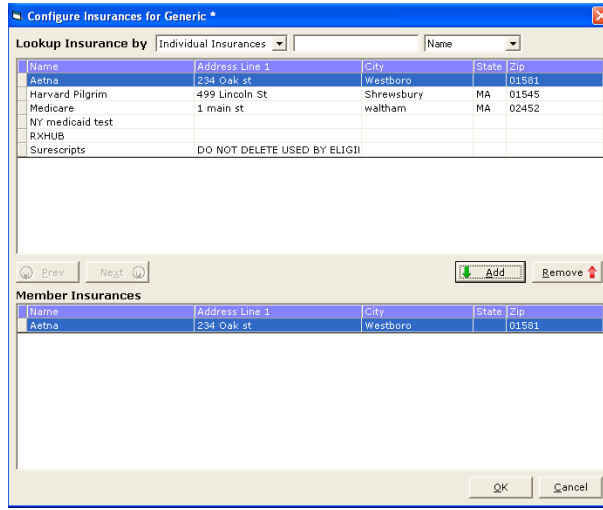


Select the lab company from the drop down and click on Configure.





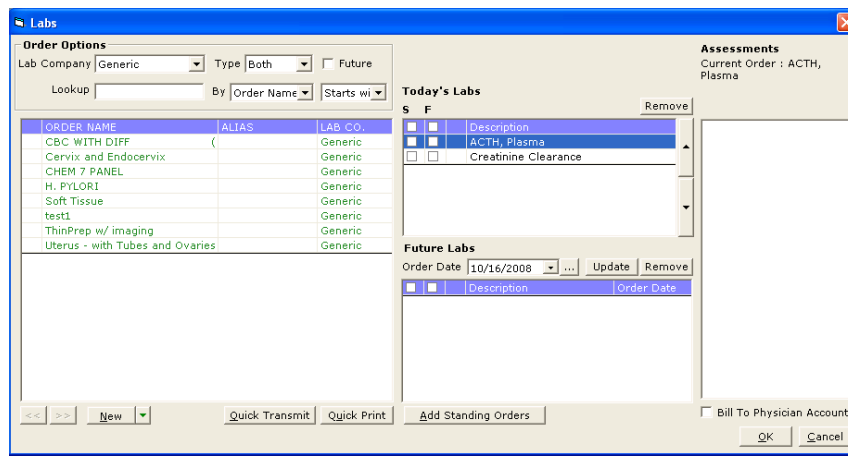
Select the insurance you want to associate with this lab company and click on the 'Add' button. This will move the insurance to the 'Member Insurances' box below.



Repeat this process if you want to associate multiple insurances with the lab company.

Once this association has been done, whenever a provider orders labs for patients who have the specific insurances associated above, the lab company will automatically display in the 'Lab Company' dropdown and all the tests for that lab company will be displayed in green.

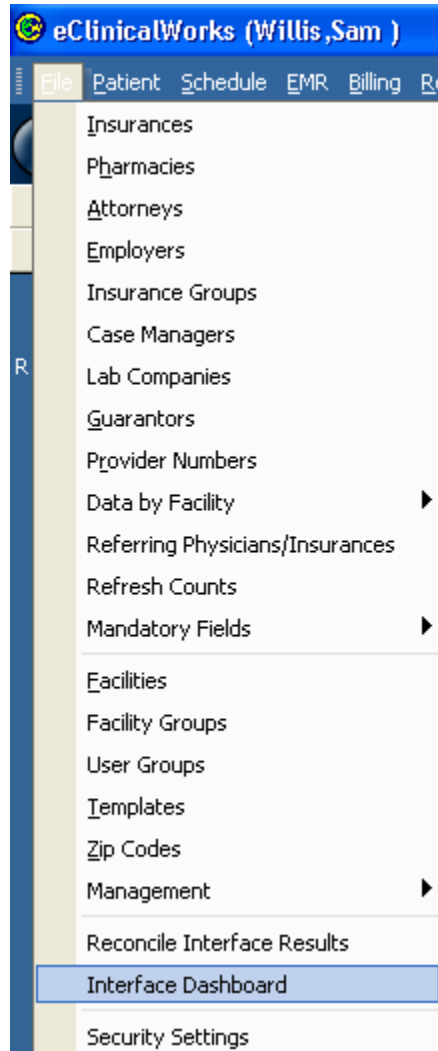
**Patient:** Test, Test M    **DOB:** 07/20/1978    **Age:** 30 Y    **Sex:** Female  
**Phone:** 838-747-4839    **Primary Insurance:** Aetna  
**Address:** 22 Mill Street, Westboro, MA-01581  
**Lab Req No:** 9110.23037    **Chart No:** 9110  
**Provider:** Sam Willis, M.D.    **Encounter Date:** 09/25/2008



The provider can now select the correct labs that are associated to the patient's insurance.

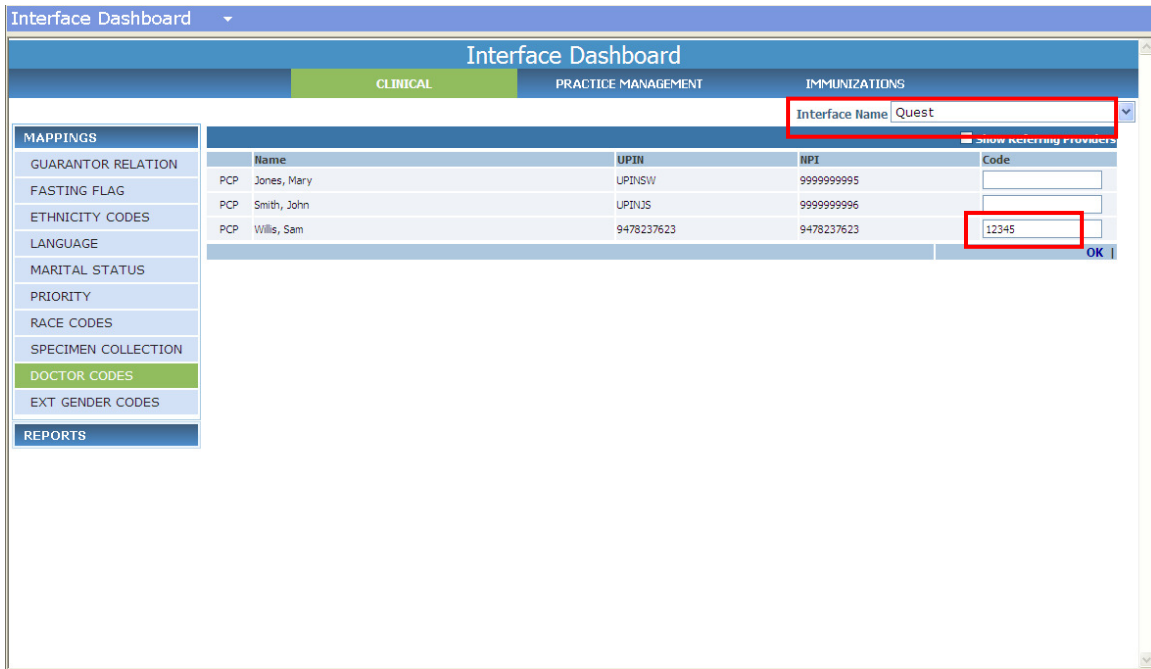
## Adding a Provider Code for a New Provider

If a new provider is added to the practice, then his/her corresponding provider code/mnemonic must be added as well. The lab company can give this code. To enter this code, go to File -> Interface Dashboard.



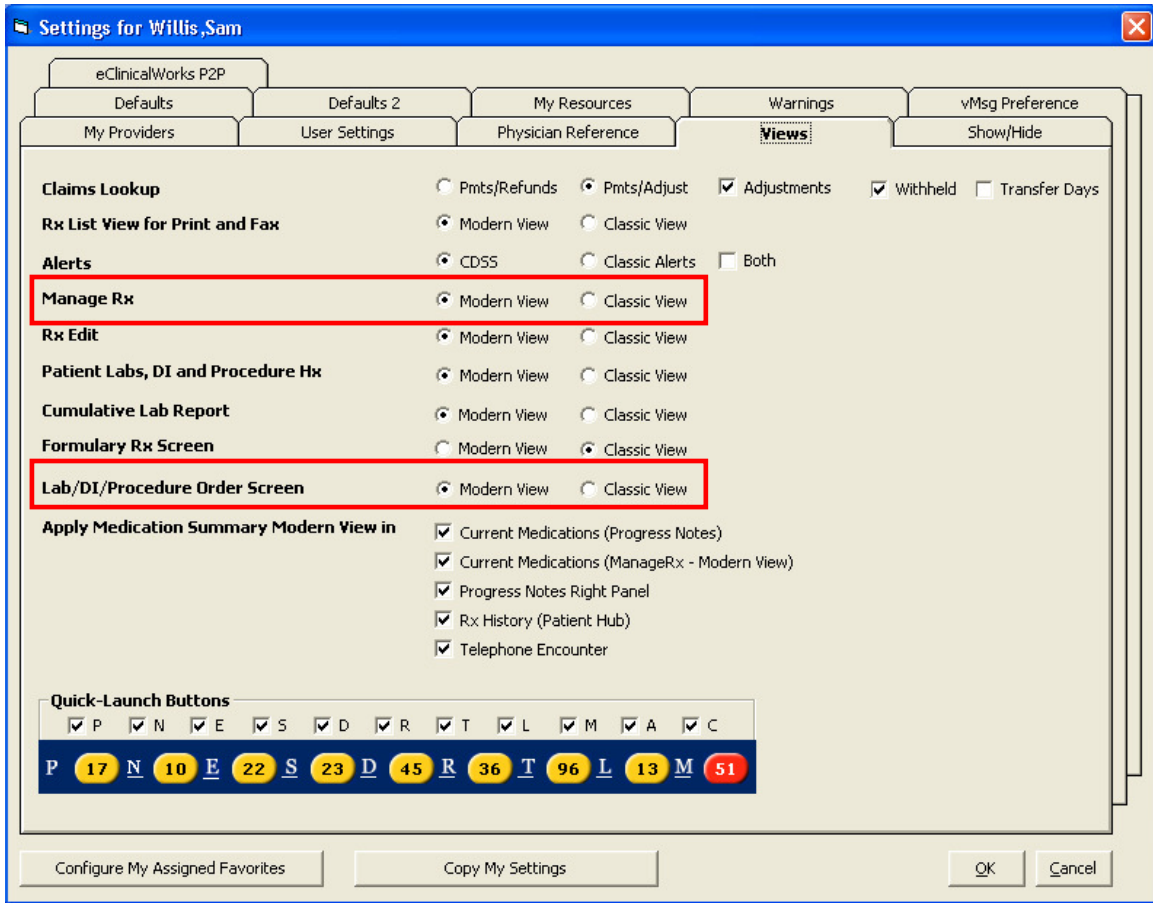
This opens the Interface Dashboard window.

Under Clinical Tab-> 'Interface Name' dropdown select the Lab Company.  
 Select 'Doctor Codes' under 'Mappings'. Enter the provider code given by the lab company in the 'Code' column corresponding to the provider and press OK.



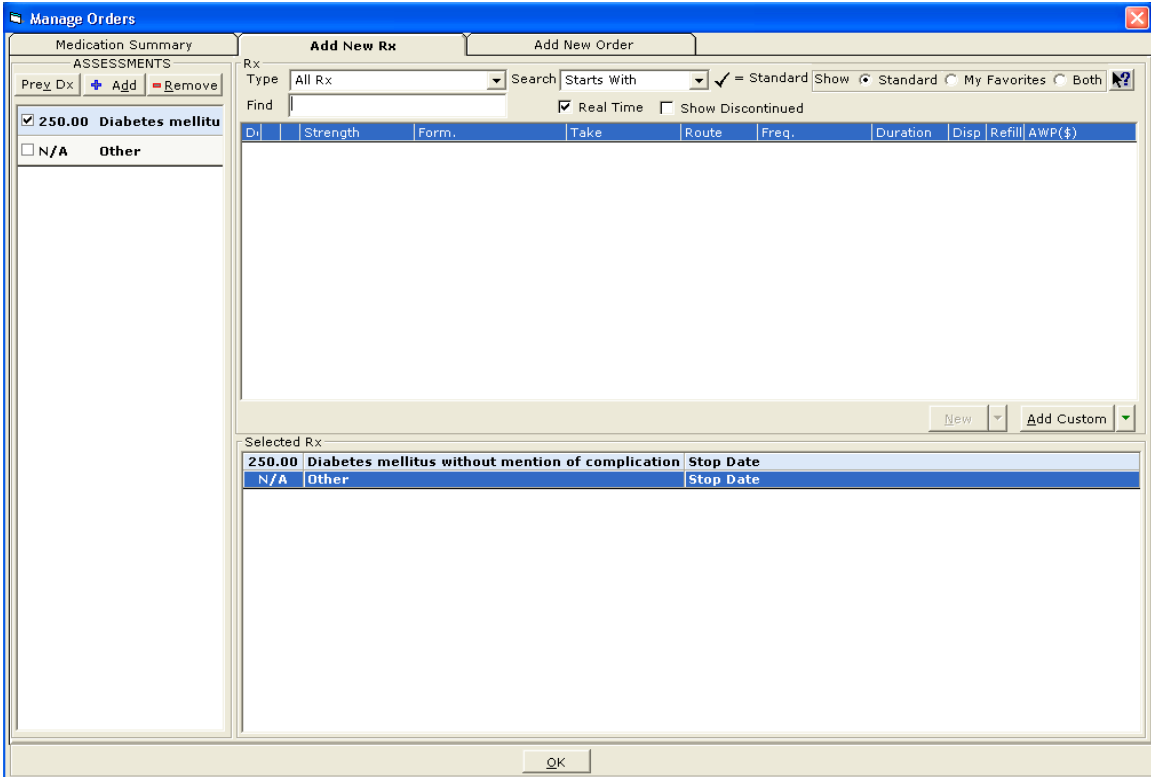
## Lab, DI & Procedure Order screen Modern View

In version 9, a newer 'Lab, DI, Procedure Order screen' can be viewed from the Treatment window of a patient's progress note. It is called Modern View. There is a setting that lets the users to switch to this view. It is found under File->Settings->My settings->Views->Lab/DI/Procedure order screen->Modern View. Since this is controlled under My Setting each user need to change it on their end.



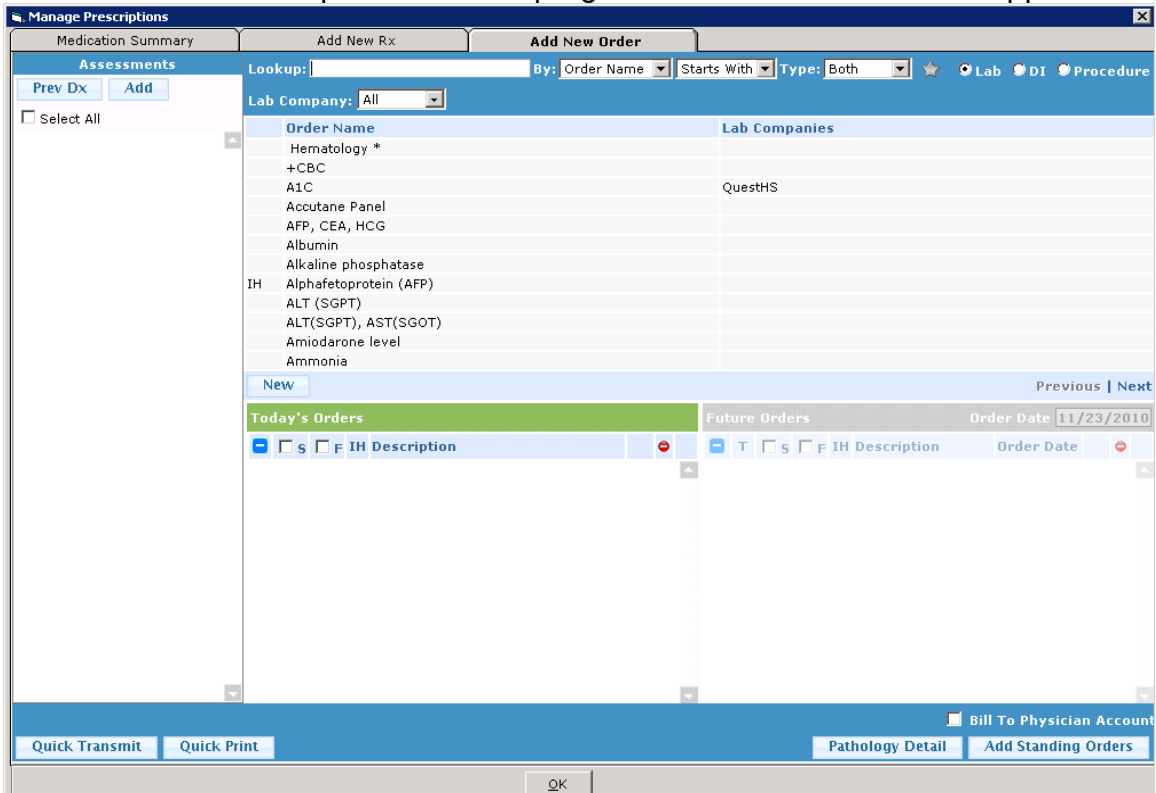
When a user switches to Modern view for Manage Rx and Lab/DI/Procedure Order screen from My Settings->Views and logs out and logs back into eClinicalWorks, the Add Rx screen and Lab screen, accessed from the treatment window changes.

When a user from a patient's progress note clicks on Treatment and Selects 'Add' under Rx the screen below appears.



From the same window a user can click on 'Add new order' to order lab.

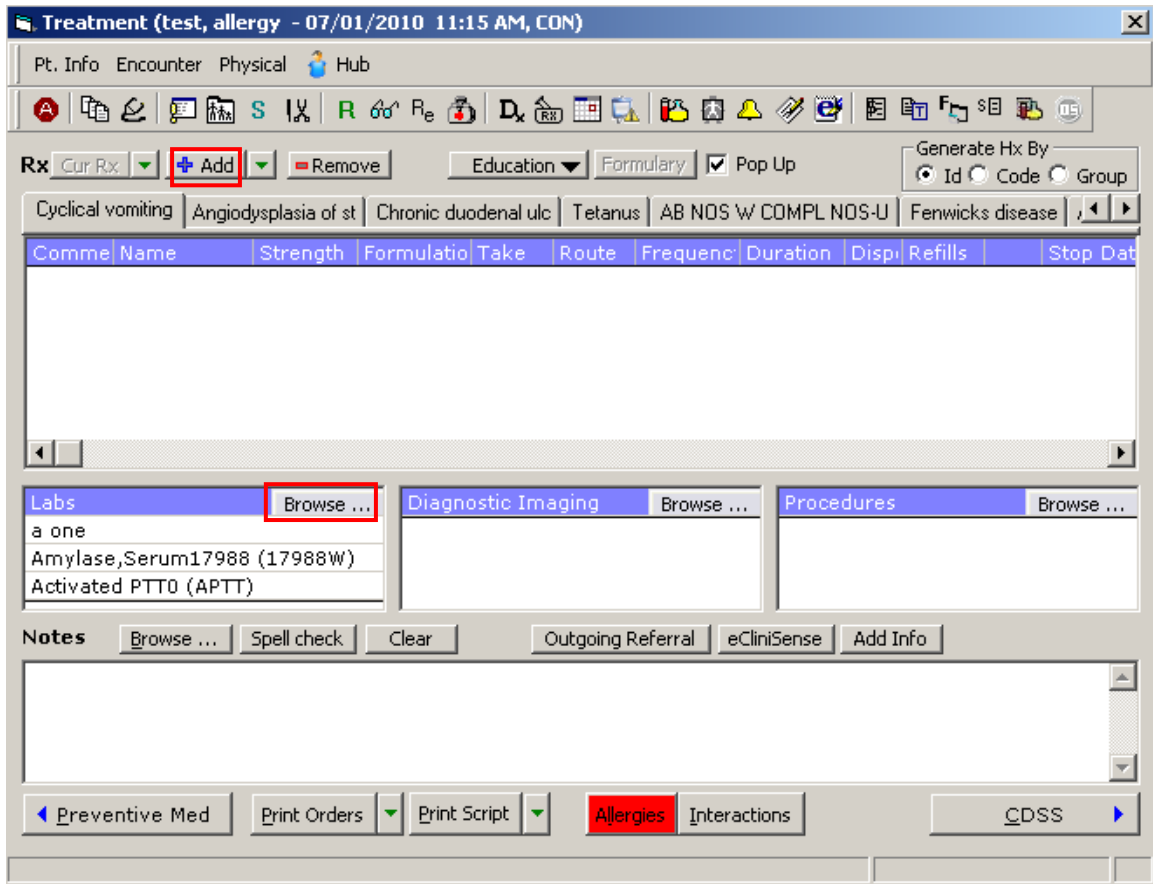
If a user from a patients progress note clicks on 'Treatment' and selects 'Browse' under Labs or 'Lab Reports' from the progress note the screen below appears.



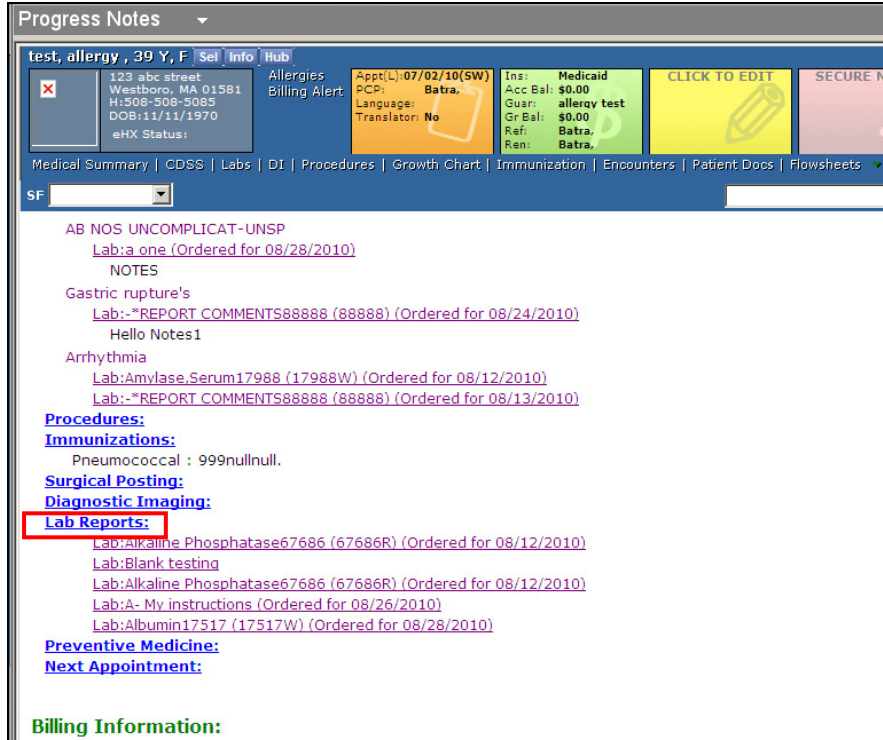
## Ordering a Test in Modern View

To order a test, go to the progress notes for a patient.

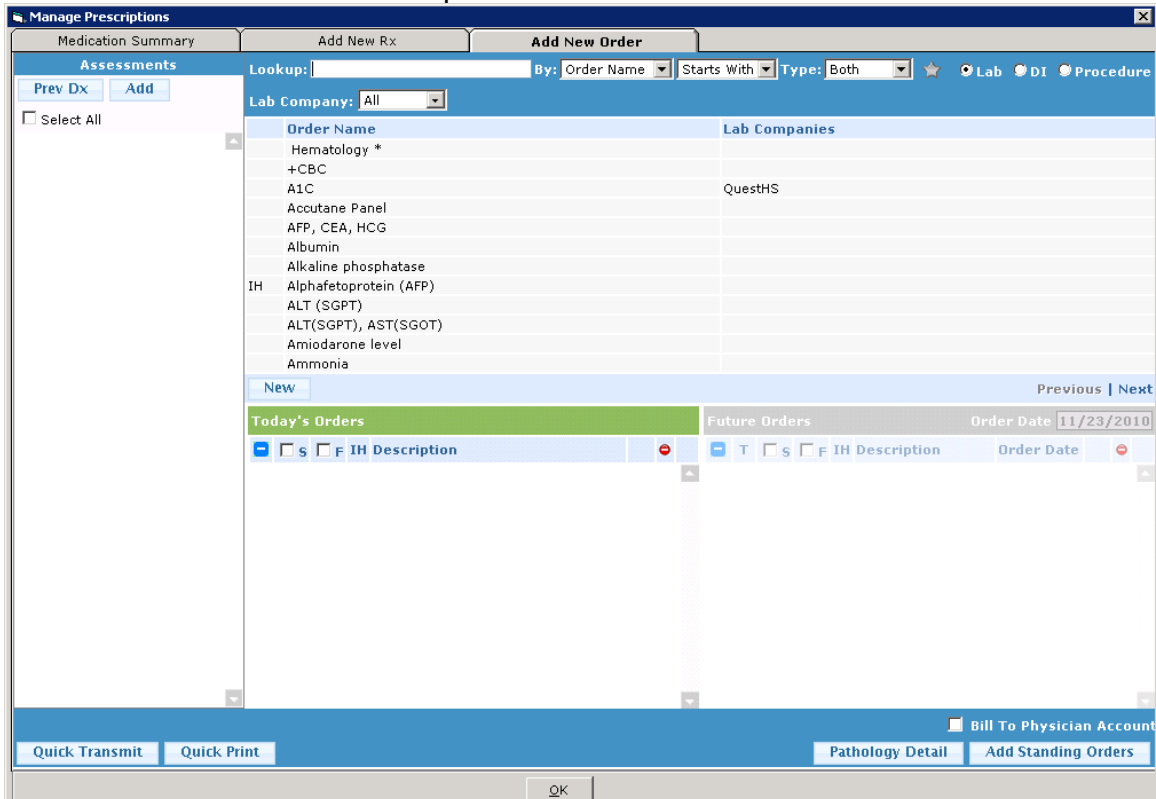
From the progress note select the assessment and click on Treatment. From the treatment window click 'Add' next to Rx if medications needed to be prescribed and click on 'Add new order tab' from that window to order lab or just click on Browse next to Labs to order labs directly.



Lab order screen can also be accessed from Progress Note by selecting Lab Reports.

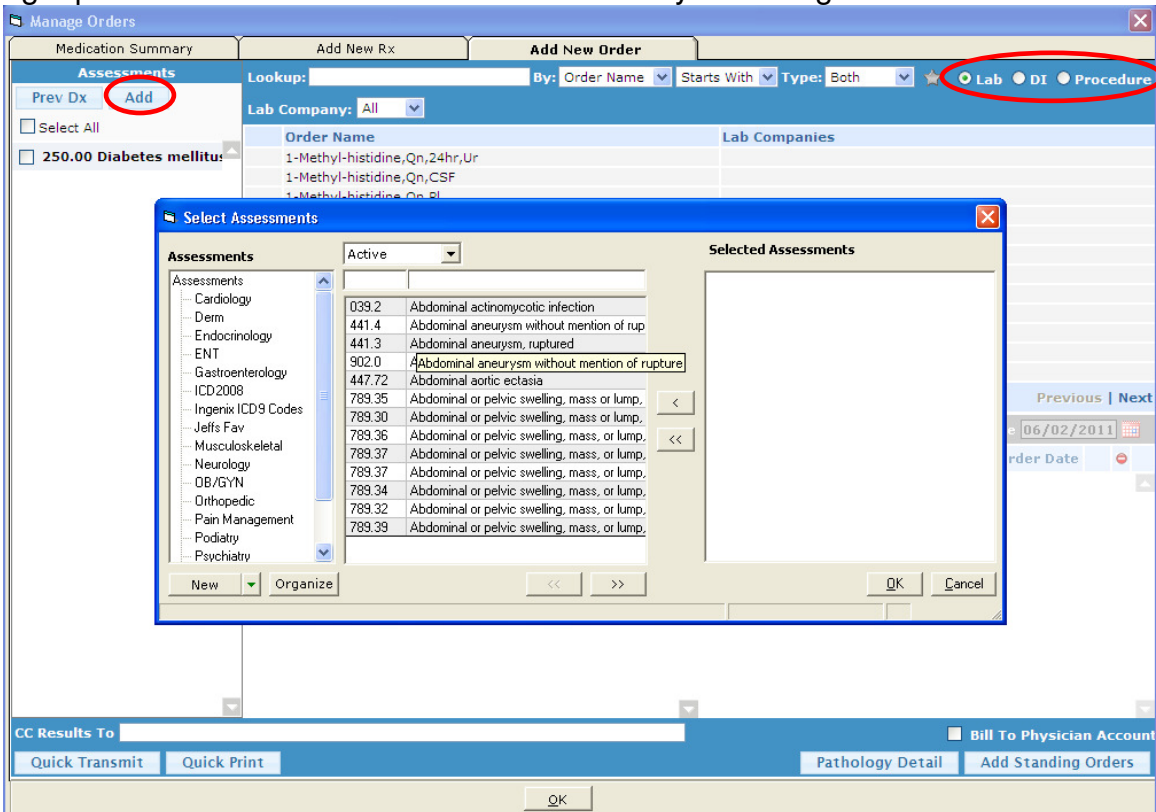


The modern lab view window opens:



On this screen, three radio buttons are present representing 'Lab', 'DI' and 'Procedure'. It will bring the corresponding Lab, DI or Procedure ordering screens.

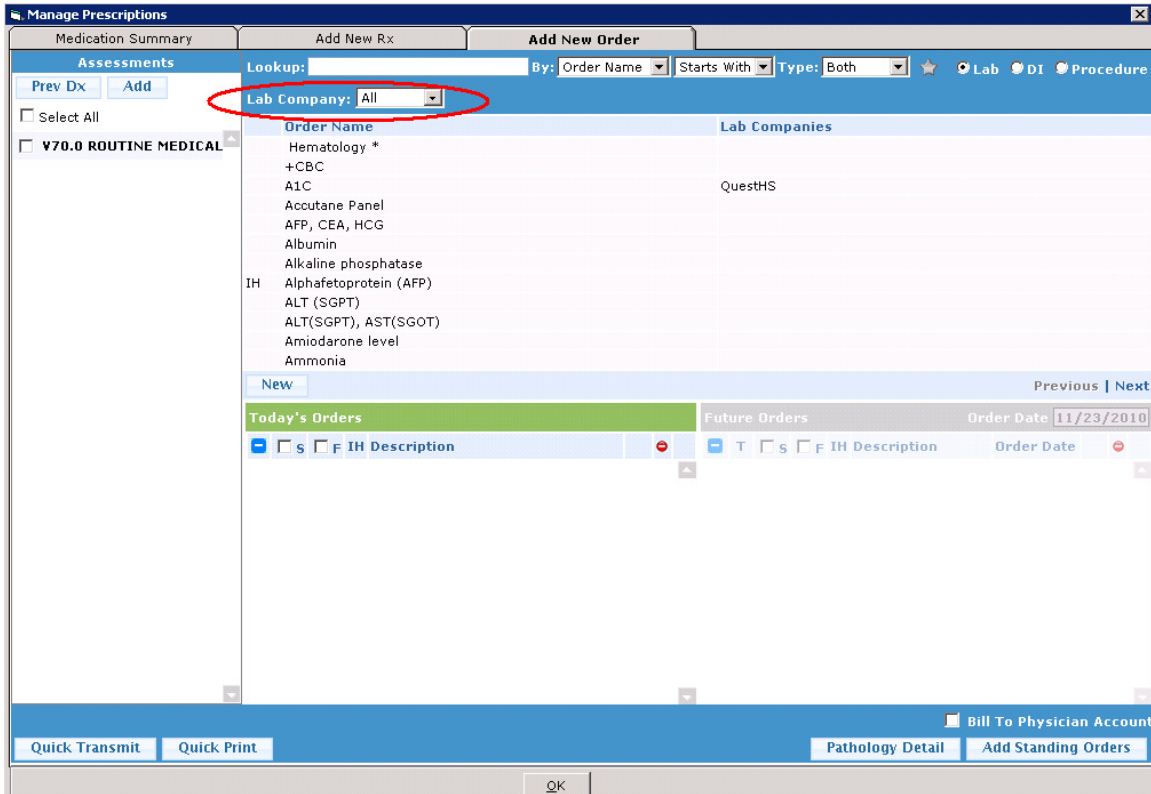
To add assessment (if not added earlier), click on 'Add' under Assessments from the left panel. Select the assessment you want and it will appear under the 'Selected Assessments' section. To remove the assessment, select it from the right panel and click on the left arrow. To save your changes click on OK.



The selected assessments will now display in the left panel under 'Assessments'. To associate different labs with different assessment, check the radio box corresponding to the assessment that is to be associated with tests, before ordering them and then order the tests.

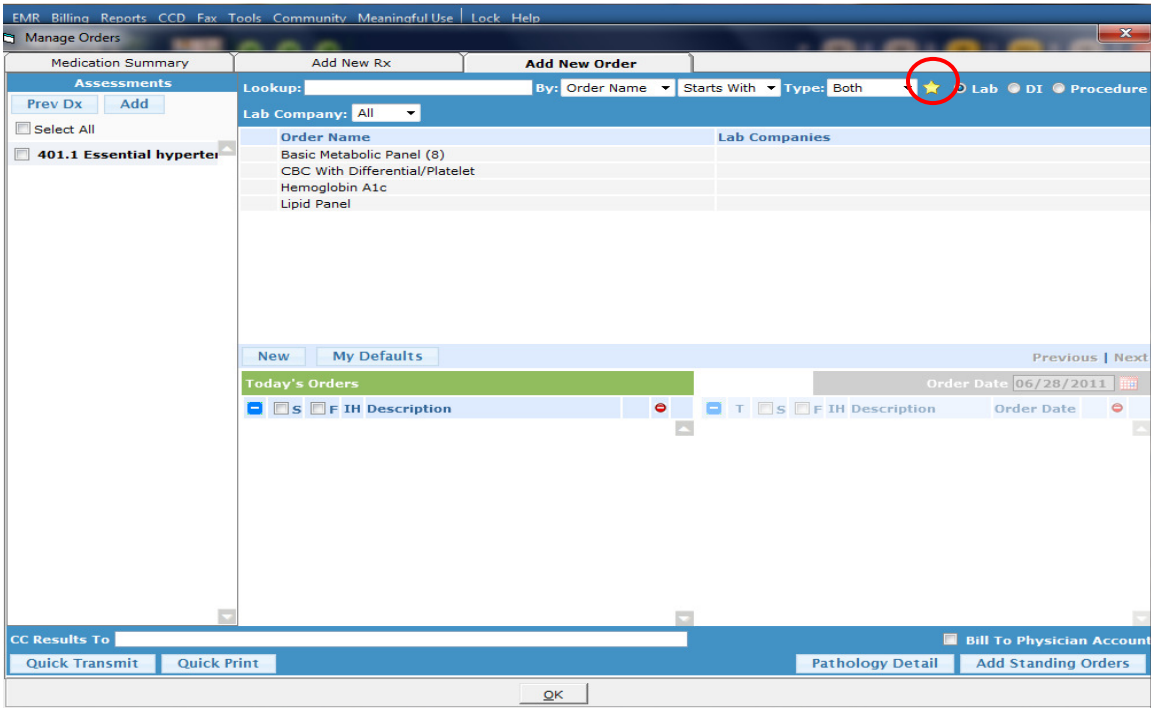
To order tests, select the name of the lab from the 'Lab Company' drop down to display all labs associated with that lab company.





The lab list is the same list as under EMR -> Labs, DI, & Procedures -> Labs.

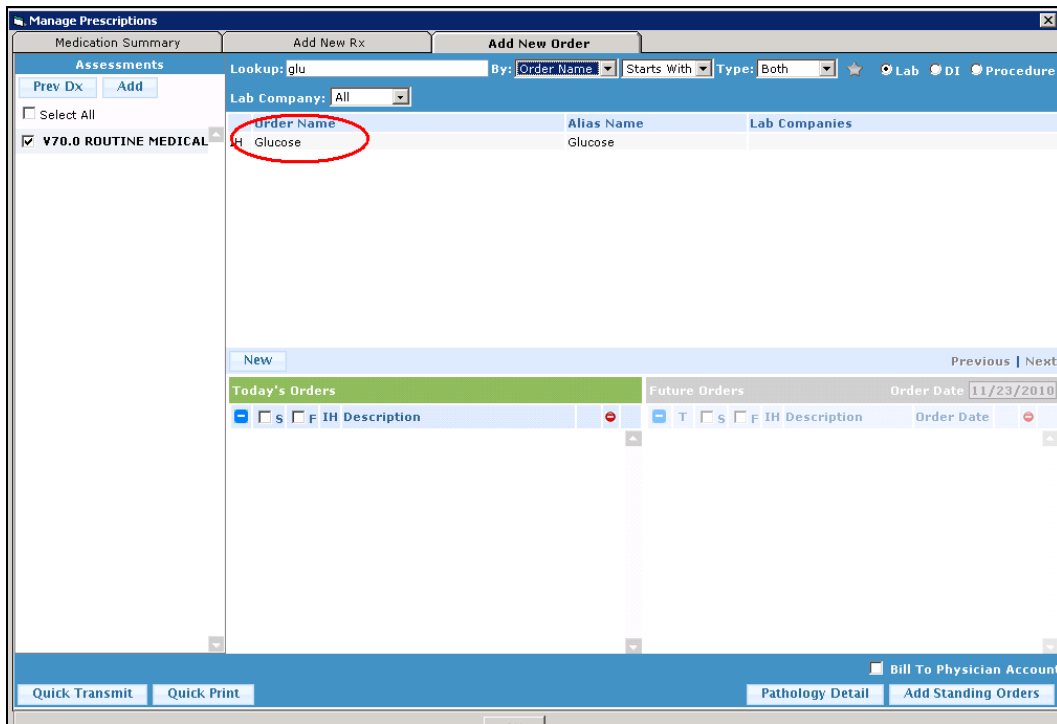
You can look up for the favorites lab that was created under EMR-> Labs, DI, & Procedures->My Labs, DI, & Procedures favorites by clicking on the star icon as shown below.



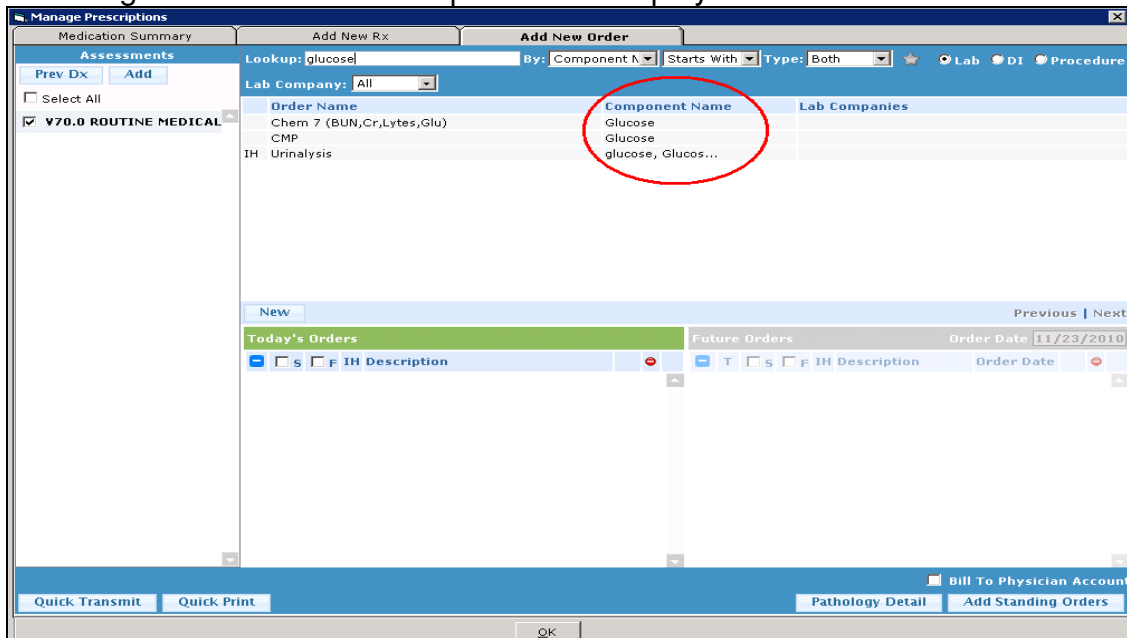
You can look up labs by either 'Order Name', 'Component Name', or 'Alias.'

**Order name** will display the orderable tests whereas **Component name** allows you to search by the test attribute. It will display all the orderable tests that contain that specific component.

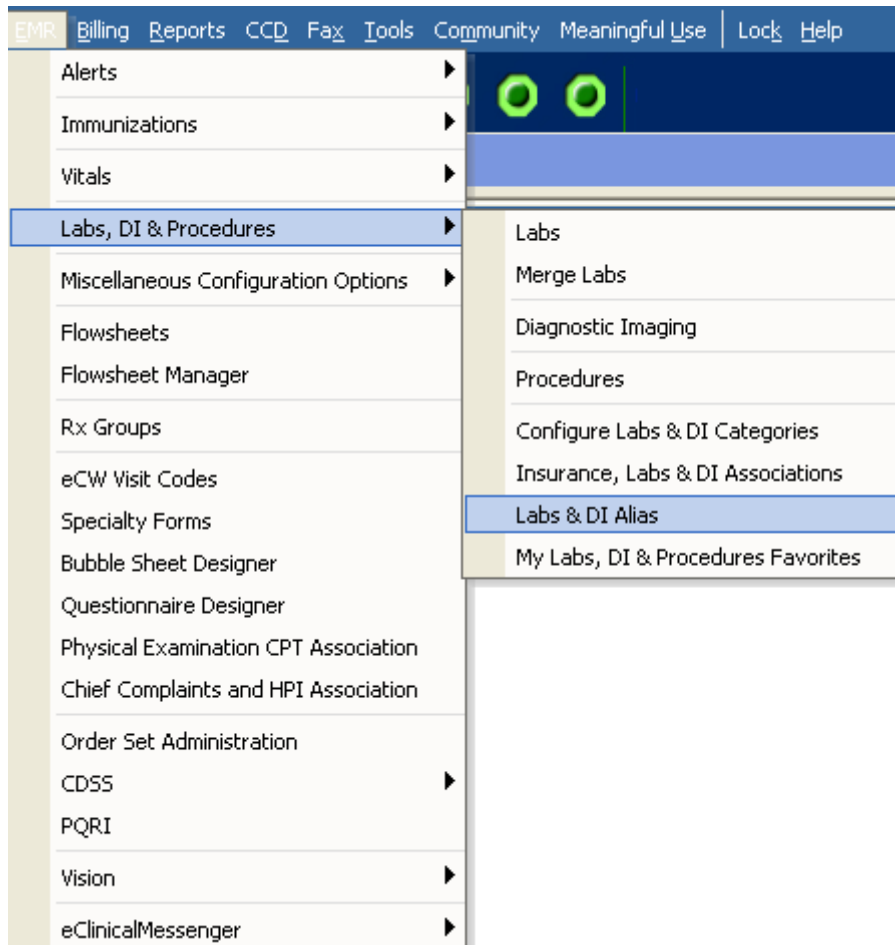
For example, searching 'Glucose' as the Order Name will display:



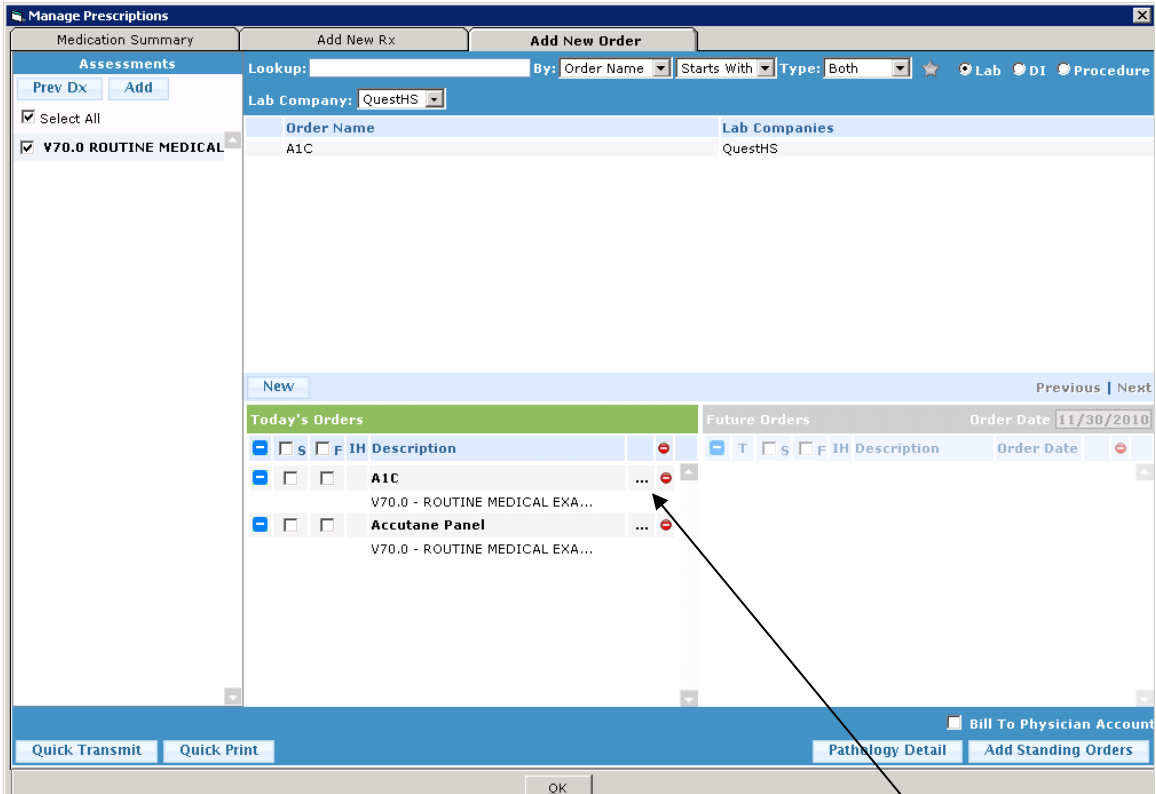
Searching 'Glucose' as the Component will display:



The **Alias** option allows you to lookup tests for which you have created aliases. This feature allows you to group and display tests together in the Lookup screen under the Alias name for you to order. Aliases are created from EMR->Lab, DI & Procedure->Lab & DI Alias.



To add labs to your current order, click on the 'Today's Orders' tab (it will be highlighted in green). Then select the assessment by checking the box corresponding to it, look up for the lab and click on the lab to order it. This makes the lab fall under Today's Orders tab with the linked assessment below it.



If you need to enter in any test specific information, click on the ellipsis next to the test name. The following screen appears:

Enter in any specific information for that test. To transmit a test specific note, enter it in the Clinical Info box. This information will print on the eReq and will transmit in the order message. Click on OK to save the data.

If this order needs to be billed to the physician, then check the box for 'Bill to Physician Account' in the lower right corner of the ordering screen.

Once you have selected your labs to order, click on 'Quick Transmit.'

**Note:** Quick Print button is to print the lab order form for uni-directional interfaces. This option should not be used for bi-directional interfaces.

Some lab companies require additional information for specific tests. For these tests, you will be prompted the Ask at Order Entry Questions (AOE) when you click on 'Quick Transmit'. Fill in the answers for these AOE prompts and click on OK. These AOE's will be transmitted in the order file and will display on the eRequisition.

The screenshot shows a dialog box titled "Ask at Order Entry Questions - CYCLOSPORA/ISOSPORA EXAM". The main heading is "Ask at Order Entry Questions" with the subtitle "CYCLOSPORA/ISOSPORA EXAM". Below this, there is a "LAB COMPANY" label and a dropdown menu currently showing "Generic". Underneath, there is a table with two columns: "Question" and "Answer". The first row has "SOURCE" under the "Question" column and an empty text input field under the "Answer" column. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

After clicking on OK, the Quick Transmit screen will display. Select the labs you want to transmit, as well as the collection date and time.

If you want the order assigned to a specific individual, select that person from the 'Assigned To' box. Otherwise, leave it blank.

Select the lab company from the Lab drop down to which you want to transmit the order.

If there is a clinical note that will apply to all the labs, it can be entered under the 'Clinical Information' option on the Quick Transmit screen (highlighted in red below). Click on Transmit to send the order.

**Transmit Labs**

Select All

NAME	LAB CO.
<input checked="" type="checkbox"/> A1C	QuestHS
<input checked="" type="checkbox"/> Accutane Panel	

Collection Date: 11/30/2010    Time: 02:41 PM    Actual Fasting: Not Recorded


Assigned To: Nurse, Nurse

Select Lab: QuestHS

**Clinical Information**

Transmit    Cancel

A printer dialog box will appear to print out the eRequisition.

 \* T E S T 5 6 . 2 2 4 8 7 \*

**Vendor: eClinicalWorks  
eREQ**

**Client Information:**  
Name: eClinicalWorks    Account No: 686868  
Address: 110 Turnpike Road,    Phone Number: 508-842-2070  
City, State, Zip: Westborough, MA, 01581

**Requisition/Physician Information:**  
Req/Ctrl# (CD-): 22487    Provider Upin: 12345  
Physician Name: Willis, Sam    Provider NPI: 24681357

**Patient Information:**  
Name: TEST,ZEE    Date of Birth: 12/12/1985  
ID: 9109    Sex: Male  
Phone: (849)503-8237    SSN: 346-45-6156  
Coll Date: 09/19/2008    Coll Time: 10:13:00

**Responsible Party/Insured's Information:**  
Name: Test, Zee    Relationship: Self  
Address: 87 Boston Turnpike Shrewsbury MA 01545

**Primary Billing: Insurance**  
Medicare#:    Medicaid/HMO#:    Worker's Comp?  
Insurance Co Name : AETNA    Payor/Carrier Code:    Physician's Provider#:  
Insurance Address: 135 East Main Street,    Subscriber/Member# :    Group Number:  
City, State, Zip: Westborough, MA, 01545

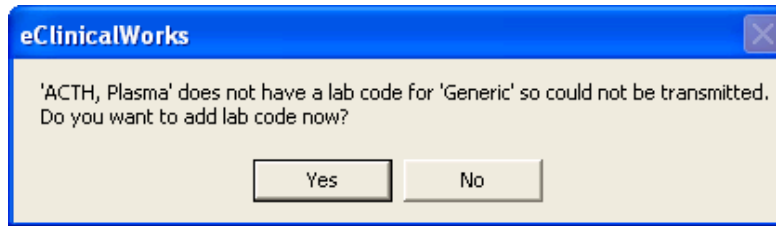
**Tests Ordered:**    **Comments:**    **AOE:**    **Diagnosis Codes:STAT: FASTING**  
C-Peptide - C-Peptide    277.3

**Authorization - Please sign and Date:**  
I hereby authorize the release of medical information related to the services described hereon and authorize payment directly to Regional Medical Labs.

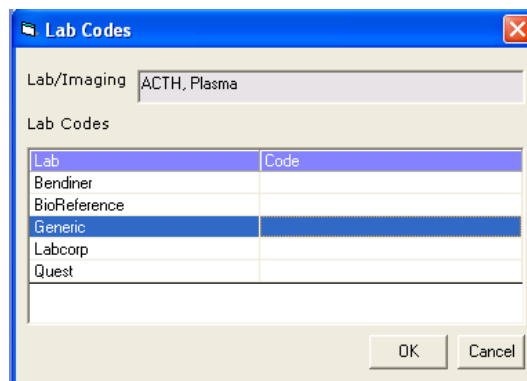
Patient Signature \_\_\_\_\_ Date \_\_\_\_\_  
Physician Signature \_\_\_\_\_ Date \_\_\_\_\_

Print    Select Printer    Print Preview

If the labs selected do not have corresponding codes for the lab company, the following error box will pop up after the 'Transmit' button is clicked.

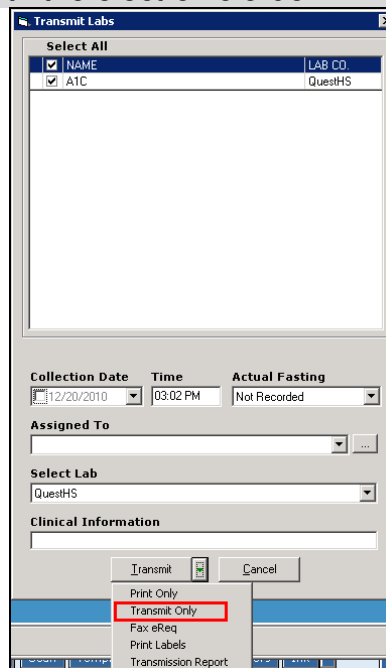


If you want to add the code now, click on Yes and enter in the code as described in the previous sections.



If you do not want the eReq to print but only want to transmit the lab, click on the arrow next to the Transmit button and select 'Transmit Only'

**Note:** Check with the vendor if this is acceptable, as many vendors require the paper requisitions along with the electronic order



If you do not want to transmit the lab at this time and would just like to print or fax the eRequisition, then click on the arrow next to the Transmit button and select either 'Print Only' or 'Fax eReq'. This will just print or fax the requisition but will not transmit the order.

## Order Transmission Based on Specimen Collection

eClinicalWorks has the ability to indicate in an order message whether the specimen was collected in-house or whether the patient goes to a Patient Service Center (PSC) for specimen collection. Depending on the vendor's capability to support this information, this feature is turned on accordingly from the backend.

With this feature turned on, the provider will see a 'Sp' column next to the labs in the Quick Transmit screen. Selecting this column indicates the specimen was collected in-house. Deselecting this column indicates the specimen was NOT collected in-house. Accordingly, this information is sent in the order message and printed on the eRequisition.

A	Sp	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NAME
<input checked="" type="checkbox"/>	<input type="checkbox"/>	C-Peptide
<input checked="" type="checkbox"/>	<input type="checkbox"/>	F] Q-ALT (2008-10-23)

Collection Date:  9 /19/2008

Time: 10:13 AM

Assigned To:

Select Lab: QuestBi

Transmit Cancel

The default setting for this column can be setup as described below:



## Configuring the Specimen Collection Status for Labs

The 'Specimen Collection' box for labs can be configured as selected (checked) by default from Practice Defaults.

### To configure the default *Specimen Collection* status for labs:

1. From the File menu, hover over the Settings option to open a drop-down list.
2. From the drop-down list, click the Practice Defaults option. The Practice Defaults window opens.
3. Click the Labs tab. The Labs options will display.
4. Check the *Select 'Specimen Collection' for current labs while transmitting* box:
  - This will always default the 'Sp' box to be checked upon transmission.

Practice Defaults

Default values set here will be applied to all computers in all offices across the practice. Please make sure to choose proper defaults.

Front Office | Mid Office | Interface | General | **Labs** | Styles | Performance | Portal | Options | Scanning/Printing

- All orders must be associated with assessment(s) while ordering
- Change appointment provider to ordering provider when transferring lab from future to current visit
- Allow ONLY selection of specimen source and description in lab review
- Show ONLY outstanding and unreviewed Future Orders in order screen
- Select 'Specimen Collection' for current labs while transmitting**  
- Option must be enabled for the supporting lab interface.
- Select the logged in provider as the default provider while ordering labs from virtual visits
- Mark In House lab as received if results are entered manually
- Do not allow transfer of reviewed future orders to current visit.
- Show notes on Progress Notes for Past Results

Show Lab Results on Progress Notes

- Show Labs/DI/Procedures notes
- Show only In-House labs results

**Lab Results**

- Assign results to referring provider  
- Assigns to ordering provider if referring provider is an external provider
- Enable 'Result Based Billing' interface (MUST be enabled for the interfaces as well)  
- CPTs and diagnosis codes are associated with lab codes upon arrival of the result.
- Send copies of lab results to providers in the 'CC list' (internal providers ONLY)  
- Option must be enabled for the supporting lab interface.

**Lab/DI Default Company**

Lab Company: None

DI Company: None

- User level default will overwrite the above selection.

**Default Bill To Physician Account**

Lab Company: Never

DI Company: Never

Save Setting for Future Orders

**Lookup Date Range For Viewing**

Lab Cumulative Report: 1000 days

View All Reports by Patient: 100 days

Maximum number of reports for the same test in Cumulative Report: 6

- Web View of Cumulative Report must be enabled

OK Cancel

All ordered tests for a patient can be viewed in the progress note of that visit. Also it can be viewed under Labs in Patient's Hub or patient dashboard in the progress note. If the ordered lab were assigned to a staff it can be view in that staff's L jelly bean.

## Transmitting Future Orders

eClinicalWorks has the ability to transmit future orders to the vendor. This feature is enabled if the vendor has capability of accepting these future orders and is typically used in the scenario where specimens are not collected in-house.

To order future tests, select the 'Future Order' tab (it will be highlighted in green) and change the order date by picking a future date and select the tests from the top panel. These will be moved down to the circled tab.

The screenshot shows the 'Manage Prescriptions' window with the 'Add New Order' tab selected. The 'Future Order' sub-tab is highlighted in green and circled in red. The 'Order Date' is set to 09/03/2010. The interface displays a list of tests on the left and a table of orders on the right.

Order Name	Alias Name	Lab Companies
-*my test (code's for my test)		Quest
-*REPORT COMMENTS88888 (88888)		Quest, Fake Lab, Generic
-DIGOXIN LEVEL		Quest
-ELECTROLYTES		Quest
-LIPID PROFILE		Quest
A- My instructions		Quest
A1C HEMOGLOBIN (DBS)58844 (58844)		Quest
Actn (Smooth Muscle) Ab (IgG)15043 (150...		Quest, Meditech
Activated PTT0 (APTT)	Bhavina	Quest, GHS, Meditech
Adrenal Ab w/rfx42465 (42465N)		Quest, Meditech, Generic
Albumin17517 (17517W)	CBC	Quest, Meditech, GHS
Alkaline Phosphatase67686 (67686R)		Quest

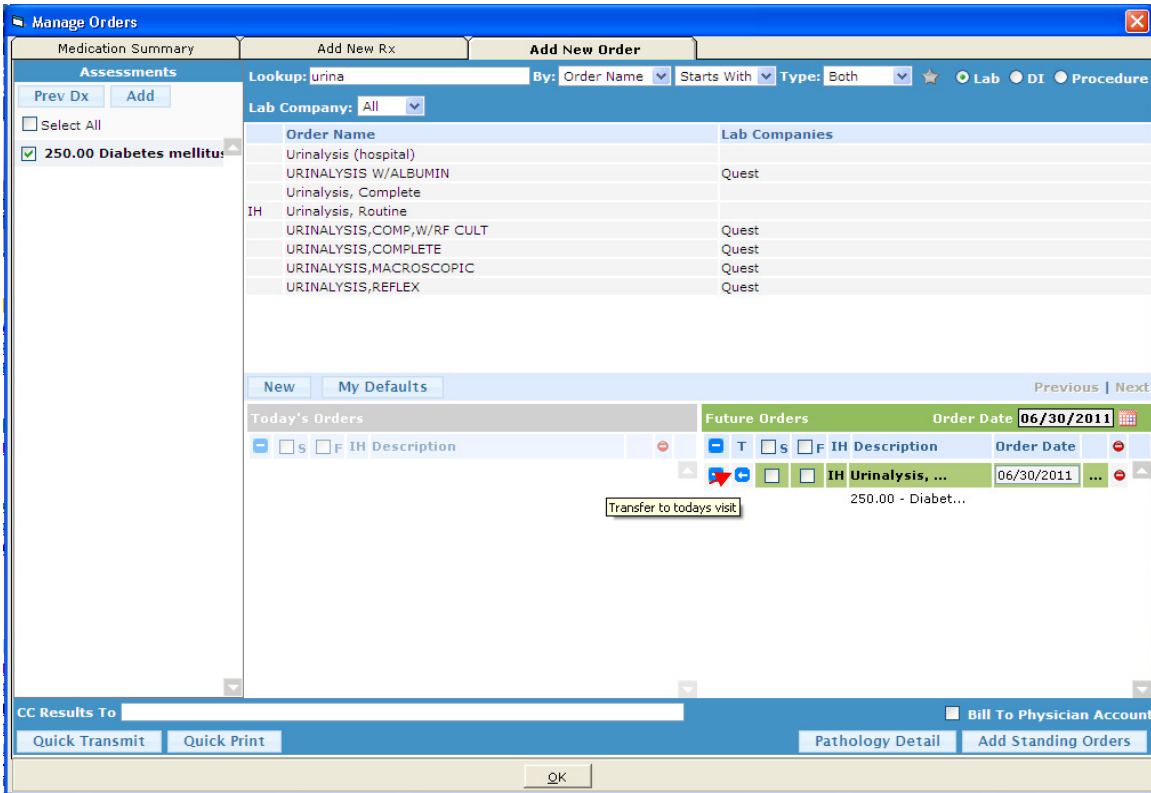
  

Current Order	Future Order	Description	Order Date
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Activated PTT0 (APTT)	08/24/2010
<input type="checkbox"/>	<input checked="" type="checkbox"/>	456.5 - Cyclical vomiting	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	008.61 - Chronic duodenal ulcer wit...	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Alkaline Phosphatase67686 (67686R)	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Blank testing	08/26/2010
<input type="checkbox"/>	<input checked="" type="checkbox"/>	BH a one	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	456.5 - Cyclical vomiting	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Actin (Smooth Muscle) Ab (IgG) 15043...	08/26/2010
<input type="checkbox"/>	<input checked="" type="checkbox"/>	382.01 - Angiodysplasia of stomach ...	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	008.61 - Chronic duodenal ulcer wit...	08/27/2010

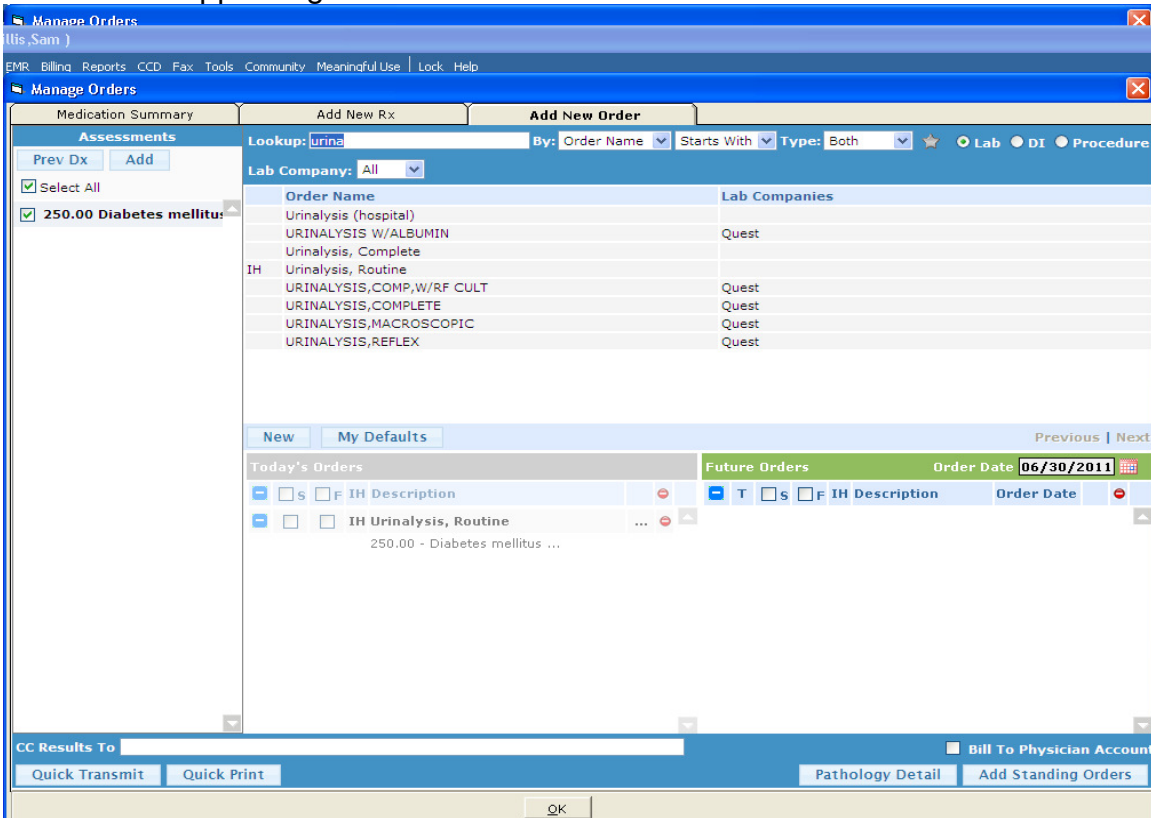
Once selected, click on Quick Transmit and the current order and future orders will display on the screen when the lab company is selected from the drop down.

**NOTE:** The future labs will only display for the lab company if this feature is enabled.

If specimens are collected in-house, patients may return to have these tests done. In this scenario, provider can transfer these future orders to the current visit. This can be done by clicking on the blue arrow under the 'Future Order' tab as shown in the screen shot below. This will move the future order to the current order for that visit.



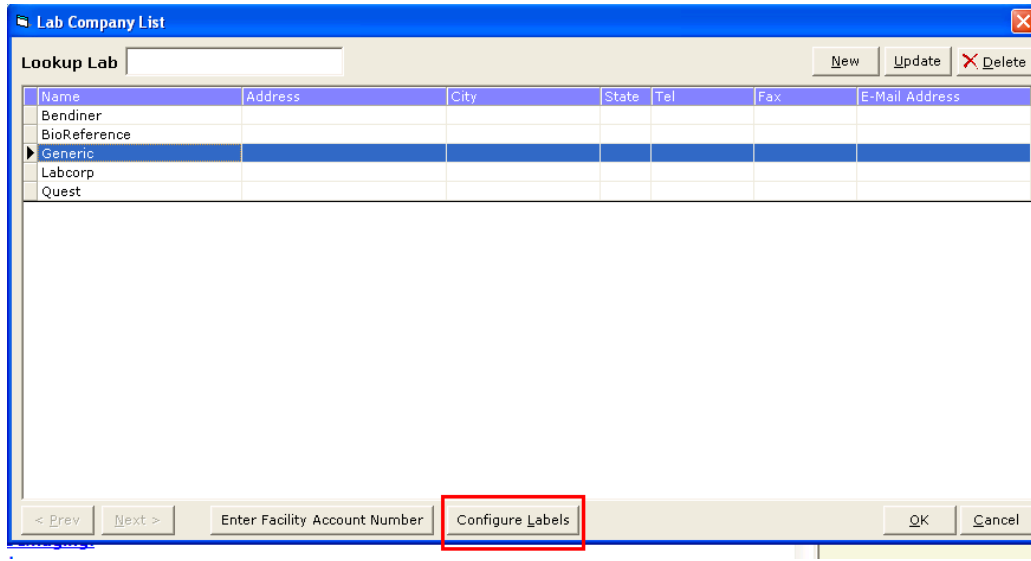
Once the order is transferred to today's visit, the order will appear in the Today's order tab disappearing from Future orders as shown below.



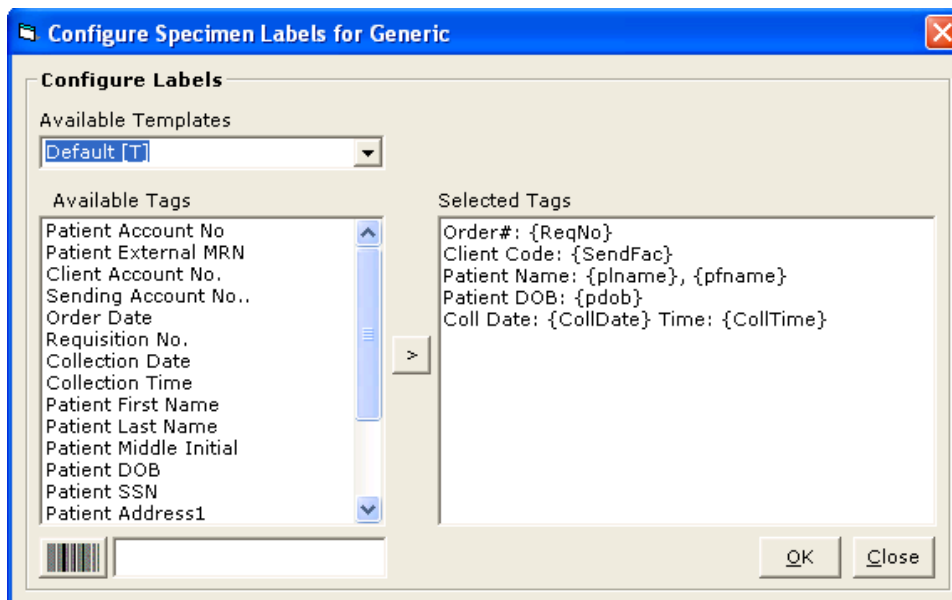
## Dymo Label Printing

If you would like to print labels from your Dymo label printer, you need to setup the labels for the lab company.

To configure Dymo labels, go to File -> Lab Companies. Select the lab company and click on 'Configure Labels.'



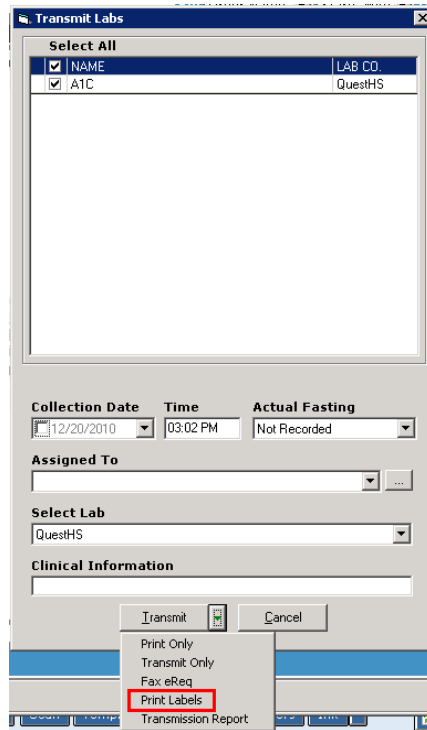
A default template has already been created. To select that template, select 'Default [T]' from the 'Available Templates' dropdown. The Selected Tags will print on the label. Additional tags can also be added from the 'Available Tags' list by selecting on the tag and clicking on the '>' button.



You can also set up tags to print with a barcode on the label by selecting on the tag and clicking on the barcode icon shown above.

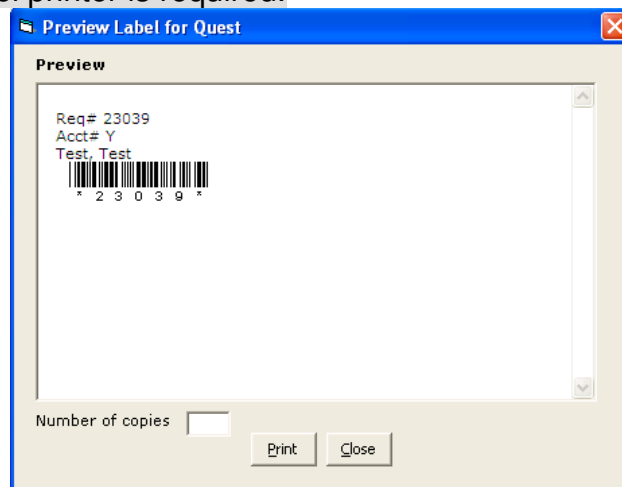
You can create your own template by selecting the appropriate tags and clicking on OK. This template is now saved for that lab company.

To print these labels, go to Lab Reports -> Quick Transmit. Select the lab company and then select 'Print Labels' from the Transmit dropdown.



A print preview will display and you can choose the number of copies you want to print. Hit Print to print the labels.

**NOTE:** A DYMO label printer is required.



## Reason Status

There are different interface reason statuses that are found in the reason column for Labs under Lab result screen.

1. **Transmitted to 'Lab Company'**- After the order has been successfully transmitted, the 'Reason' column under Labs Results screen will be updated to display 'Transmitted to 'Lab Company'' as shown below.

The screenshot shows the 'Lab Results' window for a patient named 'Test, Lab'. The 'Reason' dropdown menu is highlighted with a red box and contains the text 'Transmitted to Westborough Medical'. Other fields include 'Lab: CBC (INCLUDES DIFF/PLT)', 'Order Date: 11/1/2010', 'Collection Date: 6/1/2011', and 'Actual Fasting: Not Recorded'. The 'Specimen' section is empty.

2. **Ready to transmit** – After the order is transmitted, if the order is in pending state to be transmitted from eCW the 'Reason' column under Labs Results screen will be updated to display 'Ready to Transmit' as shown below.

The screenshot shows the 'Lab Results' window for a patient named 'Kumar, Raj'. The 'Reason' dropdown menu is highlighted with a red box and contains the text 'Ready to Transmit'. Other fields include 'Lab: HEMOGLOBIN A1c', 'Order Date: 10/12/2010', 'Collection Date: 10/12/2010', and 'Actual Fasting: Not Recorded'. The 'Specimen' section is empty.

- Requisition Printed: 'Lab Company'** - When 'Print Only' option is used to print the eRequisition, the reason message is updated to Requisition Printed: 'Lab Company' as shown below

**Lab Results**

**Patient:** Lab, Larry  
 DOB: 1/1/1983 Age: 28Y Sex: M  
 Tel: 561-750-4753  
 Acct No: 9122, WebEnabled: No

**Status:**  Open  Reviewed

**Provider:** Willis, Sam  
**Facility:** Westborough Medical Assoc  
**AssignedTo:** Willis, Sam

Don't publish to Web Portal

**Lab Information**

Lab: AMYLASE,SERUM  
 Order Date: 1/16/2009  
 Collection Date: 1/15/2009  
 Time: 04:55 PM

**Reason:** Requisition Printed: Quest  
 Actual Fasting: Not Recorded  Ordered Fasting

**Specimen**

Source	Description	Collection Volume	Units

- Received - 'Lab Company'** - Once the result comes back from the lab, the reason will change to 'Received - 'Lab Company'.'

**Lab Results**

**Patient:** Durana, Dorisa  
 DOB: 4/19/1942 Age: 69Y  
 Sex: M  
 Tel: 555-555-5516  
 Acct No: 9307, WebEnabled: No

**Status:**  Open  Reviewed

**Provider:** Willis, Sam  
**Facility:** Westborough Medical Assoc  
**AssignedTo:** Willis, Sam

Don't publish to Web Portal

**Lab Information**

Lab: PROTEIN, TOTAL, RANDOM URINE  
 Order Date: 12/3/2008  
 Collection Date: 12/3/2008  
 Time: 10:40 AM

**Reason:** Received - Westborough Medica  
 Actual Fasting: Not Recorded  Ordered Fasting

**Specimen**

Source	Description	Collection Volume	Units

**Results**

Received Date: 10/8/2010 Result:

Order Date	Coll Date	CREATINI	CREATINI	PROTEIN,	PROTEIN,
10/08/2010	10/08/2010	173		318	55
10/08/2010	10/08/2010	99		1384	137
10/08/2010	10/08/2010	131		1237	162

5. **Reconciled – ‘Lab Company’** - If the results were reconciled immediately after selecting Reconcile Now under File->Reconcile lab result, then the Reason field will update to Reconciled – ‘Lab Company’ as shown below

The screenshot shows the 'Lab Results' window for patient Durana, Dorisa. The 'Reason' dropdown menu is highlighted with a red box and contains the text 'Reconciled-Westborough Medica'. Other fields include 'Order Date' (12/3/2008), 'Collection Date' (12/3/2008), and 'Time' (08:37 AM). The 'Actual Fasting' dropdown is set to 'Not Recorded'.

Order Date	Coll Date	ALBUMIN	BUN/CREA	CALCIUM	CARBON I	CHLORIDE	CREATINI	eGf
10/08/2010	10/08/2010	3.8	41	10.0	23	109	1.70	36
10/08/2010	10/08/2010	3.7	22	9.2	16	110	1.23	53
10/08/2010	10/08/2010	4.0	25	9.2	19	112	2.48	32

6. **Manually Reconciled – ‘Lab Company’** - If the results were manually reconciled then the Reason field will update to Manually Reconciled – ‘Lab Company’ as shown below.

The screenshot shows the 'Lab Results' window for patient Durana, Dorisa. The 'Reason' dropdown menu is highlighted with a red box and contains the text 'Manually Reconciled - Westbon'. Other fields are identical to the previous screenshot, including 'Order Date' (12/3/2008), 'Collection Date' (12/3/2008), and 'Time' (08:37 AM).

Order Date	Coll Date	ALBUMIN	BUN/CREA	CALCIUM	CARBON I	CHLORIDE	CREATINI	eGf
10/08/2010	10/08/2010	3.8	41	10.0	23	109	1.70	36
10/08/2010	10/08/2010	3.7	22	9.2	16	110	1.23	53
10/08/2010	10/08/2010	4.0	25	9.2	19	112	2.48	32



These statuses can also be found under Labs in Patient's Hub or Progress Note.

LAB CATEGORIES	HM	O	Order Date	Coll Date	Result Date	Labs	Reason	Result	Received	Reviewed
ALL										
ANATOMIC PATH/CYTO...			11/01/2010			CBC (INCLUDES DIFF/PLT)	Ready to Tran...		No	No
BLOOD BANK			10/29/2010		11/02/2010	Lipid Panel With LDL...		Normal	Yes	No
BLOOD GASES			10/15/2010			CBC (INCLUDES DIFF/PLT)	Transmitted t...		No	No
CHEMISTRY			10/15/2010			LIVER PANEL II	Requisition P...		No	No
COAGULATION			10/13/2010		10/15/2010	Hemoglobin A1c		High	Yes	Yes
GENETICS			10/13/2010		10/15/2010	Urinalysis, Complete		Negative	Yes	Yes
HEMATOLOGY			10/13/2010	10/13/2010	10/15/2010	CBC With Differentia...		Abnormal	Yes	Yes
IMMUNOLOGY			10/13/2010		10/15/2010	TSH+Free T4		High	Yes	Yes
IMMUNOLOGY RAST			10/13/2010		10/15/2010	RENAL FUNCTION PANEL...	Manually Reco...		Yes	No
MICROBIOLOGY			10/13/2010		10/15/2010	URINALYSIS, COMPLETE...	Received -Wes...		Yes	Yes
MISC BODY FLUIDS			10/13/2010			SODIUM			No	No
TOXICOLOGY/DRUG MO...										
URINALYSIS / URINE...										
URINE CHEMISTRY										
URINE STUDIES										

A new feature in 9.0 (which is itemkey enabled) will create a new column called 'Interface Status' which will populate with the interfaces messages above, instead of populating in the 'Reason' column. This can be activated per client request.

LAB CATEGORIES	HM	O	Order Date	Coll Date	Result Date	Labs	Reason	Result	Interface Status
ALL									
ANATOMIC PATH/CYTO...			12/14/2010	12/20/2010		A1C			Transmitted...
BLOOD BANK			12/14/2010	12/20/2010		TSH			Transmitted...
BLOOD GASES			12/09/2010			testcpl			Transmitted to Generic
CHEMISTRY			12/09/2010			A1C			
COAGULATION			12/09/2010			A1C			Requisition...
GENETICS			12/07/2010			testcpl			
HEMATOLOGY			12/07/2010			Alkaline phosph...			Requisition...
HEMATOLOGY/COAGULA			12/07/2010			Accutane Panel			Requisition...
IMMUNOLOGY			11/23/2010			Accutane Panel			
IMMUNOLOGY RAST			11/23/2010			A1C			
MICROBIOLOGY			11/16/2010	08/16/2007	08/17/2007	Lipid Profile	Keep	Normal	
MISC BODY FLUIDS			11/16/2010		03/18/2010	Glucose	Diabetes	Normal	
New Category			11/16/2010		08/16/2007	08/17/2007	CMP	Keep	
TOXICOLOGY/DRUG MO...			11/16/2010	08/16/2007	08/17/2007	PSA	Keep		
URINALYSIS / URINE...									

## Receiving and Reviewing Results

To view labs for a specific patient, you can click on the Labs button from the Progress Note or from the Patient Hub. It lists all labs ordered for that patient.

When the result comes back, you will see a pink paper clip on the left of the lab with a message from which lab company it was received from in the 'Reason' column.

Labs (test, Lab) Lab Category-All												
Show CC List												
New   Delete   Cumulative Report												
	HM	O	Order Date	Coll Date	Result Date	Labs	Reason	Result	Received	Reviewed		
+		C	12/14/2010	12/20/2010		A1C	Transmitted t...		No	No		
+		C	12/14/2010	12/20/2010		TSH	Transmitted t...		No	No		
+		T	12/09/2010			testcpl			No	Yes		
+		F	12/09/2010			A1C			No	No		
+		C	12/09/2010			A1C	Requisition P...		No	No		
+		F	12/07/2010			testcpl			No	No		
+		C	12/07/2010			Alkaline phosphatase	Requisition P...		No	Yes		
+		C	12/07/2010			Accutane Panel	Requisition P...		No	Yes		
+		C	11/23/2010			Accutane Panel			No	No		
+		C	11/23/2010			A1C			No	No		
+		C	11/16/2010	08/16/2007	08/17/2007	Lipid Profile	Received from...	Normal	Yes	Yes		
+		C	11/16/2010		03/18/2010	Glucose	Diabetes	Normal	Yes	No		
+		C	11/16/2010	08/16/2007	08/17/2007	CMP	Received from...		Yes	Yes		
+		C	11/16/2010	08/16/2007	08/17/2007	PSA	Received from...		Yes	No		

A new feature in 9.0 is to view the discrete values of the result by clicking on the + sign. This expands the result to display the values as shown below:

Labs (test, Lab) Lab Category-All																																										
Show CC List																																										
New   Delete   Cumulative Report																																										
	HM	O	Order Date	Coll Date	Result Date	Labs	Reason	Result	Received	Reviewed																																
+		C	11/16/2010	08/16/2007	08/17/2007	CMP	Received from...		Yes	Yes																																
<table border="1"> <thead> <tr> <th>Attributes</th> <th>Values</th> <th>Range</th> </tr> </thead> <tbody> <tr> <td>BUN/Creatinine Ratio</td> <td>13</td> <td></td> </tr> <tr> <td>Calcium</td> <td>9.9</td> <td></td> </tr> <tr> <td>Carbon Dioxide</td> <td>25</td> <td></td> </tr> <tr> <td>Chloride</td> <td>104</td> <td></td> </tr> <tr> <td>Creatinine</td> <td>1.2</td> <td></td> </tr> <tr> <td>Glucose</td> <td>92</td> <td></td> </tr> <tr> <td>Potassium</td> <td>4.7</td> <td></td> </tr> <tr> <td>Sodium</td> <td>140</td> <td></td> </tr> <tr> <td>Urea Nitrogen (BUN)</td> <td>15</td> <td></td> </tr> </tbody> </table>													Attributes	Values	Range	BUN/Creatinine Ratio	13		Calcium	9.9		Carbon Dioxide	25		Chloride	104		Creatinine	1.2		Glucose	92		Potassium	4.7		Sodium	140		Urea Nitrogen (BUN)	15	
Attributes	Values	Range																																								
BUN/Creatinine Ratio	13																																									
Calcium	9.9																																									
Carbon Dioxide	25																																									
Chloride	104																																									
Creatinine	1.2																																									
Glucose	92																																									
Potassium	4.7																																									
Sodium	140																																									
Urea Nitrogen (BUN)	15																																									

To view the electronic result, click once on the pink paper clip. The following will display:

Westborough Medical Associates  
114 Turnpike road Suite 204  
Westborough, MA 01581  
508-836-2700

PHYSICIAN INFORMATION		PATIENT INFORMATION	
Requesting: Willis, Sam		Name: test, Lab	
		DOB: 01/01/1980	
		Sex: female	
		Tel: 508-888-8888	

REPORT DETAILS		REPORT DATES	
Name: CMP		Order: 11/16/2010	
Accession ID: 25104		Collection: 11/16/2010 13:51:00	
Lab Ref Id: 25104		Report: 11/16/2010	

NAME	VALUE	REF RANGE
GLUCOSE	92	65-99 MG/DL
UREA NITROGEN (BUN)	15	7-25 MG/DL
CREATININE	1.2	0.5-1.2 MG/DL
BUN/CREATININE RATIO	13	6-25 (CALC)
SODIUM	140	135-146 MMOL/L
POTASSIUM	4.7	3.5-5.3 MMOL/L
CHLORIDE	104	98-110 MMOL/L
CARBON DIOXIDE	25	21-33 MMOL/L
CALCIUM	9.9	8.5-10.4 MG/DL

Patient: test, Lab DOB: 01/01/1980

Print Fax Patient Hub Cancel

You can also print or fax the report from this screen.

To view the original order with the values populating in the yellow grid, directly click on the test name, and the following screen will appear:

Lab Results

Patient: test, Lab  
DOB: 12/12/1961 Age: 49Y  
Sex: F  
Tel: 508-888-8888  
Acct No: 75802, WebEnabled: No

Status:  Open  Reviewed

Provider: Willis, Sam  
Facility: Westborough Medical Assoc  
Assigned To: Willis, Sam

Don't publish to Web Portal

Lab Information

Lab: CMP  
Order Date: 11/16/2010  
Collection Date: 11/16/2010  
Time: 01:51 PM

Reason: Received from Generic  
Actual Fasting: Not Recorded  
 Ordered Fasting

Specimen

Source	Description	Collection Volume	Units

Results

Received Date: 11/16/2010 Result: [Empty]

Order Date	Coll Date	Glucose	Urea Nitro	Creatinine	BUN/Crea	Sodium	Potassium	Chlori
11/16/2010	11/16/2010	92	15	1.2	13	140	4.7	104

Assessments: Show Specify Notes: Addendum  
add note

Clinical Info: lab req Internal Notes: ecw only eClinicalMessenger

Custom Reports Print Midmark ECG Display Graph Options

OK Cancel

To view all the results in one report, click on the 'Cumulative Report' button on the Labs screen.

LAB CATEGORIES	HM	O	Order Date	Coll Date	Result Date	Labs	Reason	Result	Received	Reviewed
ALL										
ANATOMIC PATH/CYTO...			12/14/2010	12/20/2010		A1C	Transmitted t...		No	No
BLOOD BANK			12/14/2010	12/20/2010		TSH	Transmitted t...		No	No
BLOOD GASES			12/09/2010			testcpl			No	Yes
CHEMISTRY			12/09/2010			A1C			No	No
COAGULATION			12/09/2010			A1C	Requisition P...		No	No
GENETICS			12/07/2010			testcpl			No	No
HEMATOLOGY			12/07/2010			Alkaline phosphatase	Requisition P...		No	Yes
HEMATOLOGY/COAGULA			12/07/2010			Accutane Panel	Requisition P...		No	Yes
IMMUNOLOGY			11/23/2010			Accutane Panel			No	No
IMMUNOLOGY RAST			11/23/2010			A1C			No	No
MICROBIOLOGY			11/16/2010	08/16/2007	08/17/2007	Lipid Profile	Received from...	Normal	Yes	Yes
MISC BODY FLUIDS			11/16/2010		03/18/2010	Glucose	Diabetes	Normal	Yes	No
New Category			11/16/2010	08/16/2007	08/17/2007	CMP	Received from...		Yes	Yes
TOXICOLOGY/DRUG MO.			11/16/2010	08/16/2007	08/17/2007	PSA	Received from...		Yes	No
URINALYSIS / URINE...										

**Note:** A new feature of 9.0 is that manually entered results will also display in this report; It will show both electronic and in-house values.

From: 06/01/2006 To: 12/21/2010  
 Lookup By: Collection Date Sort By: Collection Date  
 Categories: ALL Lab: [ ]

Patient Name: test, Lab  
 Date of Birth: 12/12/1961  
 Telephone: 508-888-8888

**CBC UNASSDIFF.2202**

COLLECTION DATE	10/10/2008
ORDER DATE	10/10/2008
RESULT DATE	12/21/2010
ORDERING PHYSICIAN	Sam Willis MD
HCT	34.0 (34.0-44.0 %)
HGB	11.0 (11.1-15.7 G/DL) L
MCH	34.0 ( PG)
MCHC	36.0 ( G/DL)
MCV	81.0 (81.0-99.0 FL)
RBC	15.00 (4.2-5.4 /CMM)
WBC	SAPRO1 (4.5-13.0 /CMM)

**Lipid Profile**

COLLECTION DATE	08/16/2007
ORDER DATE	11/16/2010
RESULT DATE	08/17/2007
ORDERING PHYSICIAN	Sam Willis MD
Triglycerides	70 (55 - 115 mg/dl)
Total Chol	166 (55 - 115 mg/dl)
HDL	61 (50 - 100 mg/dl)
LDL	91 (100 - 150 mg/dl)

**CMP**

COLLECTION DATE	08/16/2007
ORDER DATE	11/16/2010
RESULT DATE	08/17/2007
ORDERING PHYSICIAN	Sam Willis MD
Glucose	92
Urea Nitrogen (BUN)	15
Creatinine	1.2
BUN/Creatinine Ratio	13
Sodium	140
Potassium	4.7
Chloride	104
Carbon Dioxide	25
Calcium	9.9

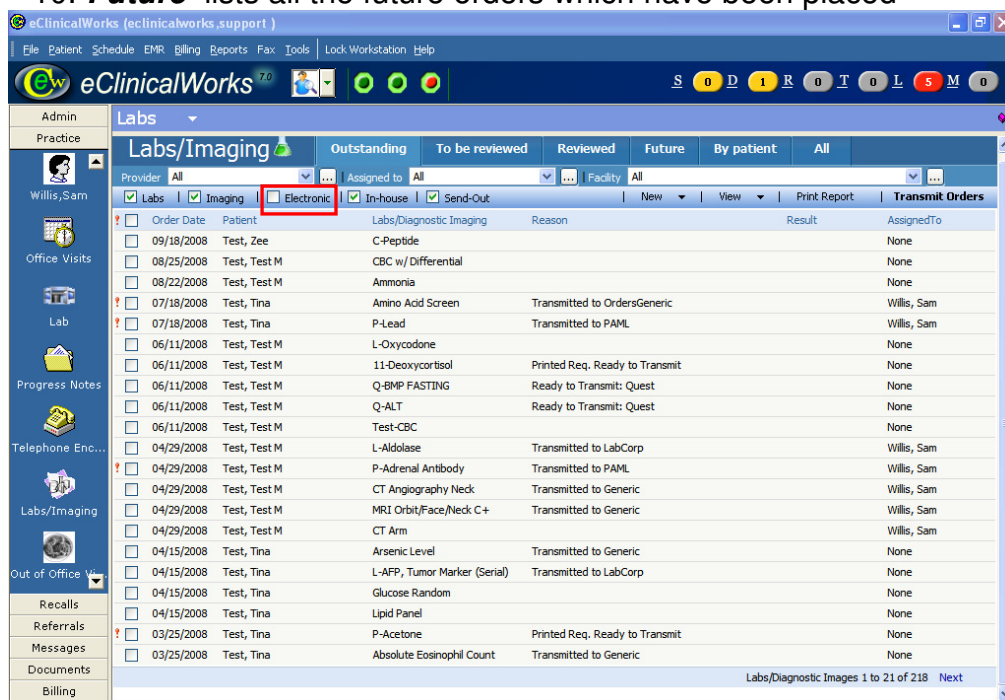
**PSA**

COLLECTION DATE	08/16/2007
ORDER DATE	11/16/2010
RESULT DATE	08/17/2007

The Cumulative Report lets the provider search within a specific date range, and do a lookup or sort by either Collection or Order date. The provider also has an option of searching by a specific lab category or pulling up a report for a specific test. This report can be printed or faxed.

Another area in eClinicalWorks from where the provider can track all the labs is from the 'Labs/Imaging' section.

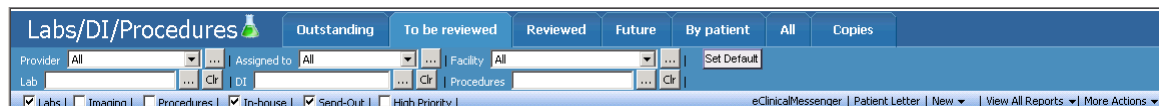
7. **'Outstanding'** lists all the labs that have been ordered and for which the results have not yet come in.
8. **'To be Reviewed'** lists all labs for which the results have come back.
9. **'Reviewed'** lists all reviewed labs which are locked and no more changes can be made.
10. **'Future'** lists all the future orders which have been placed



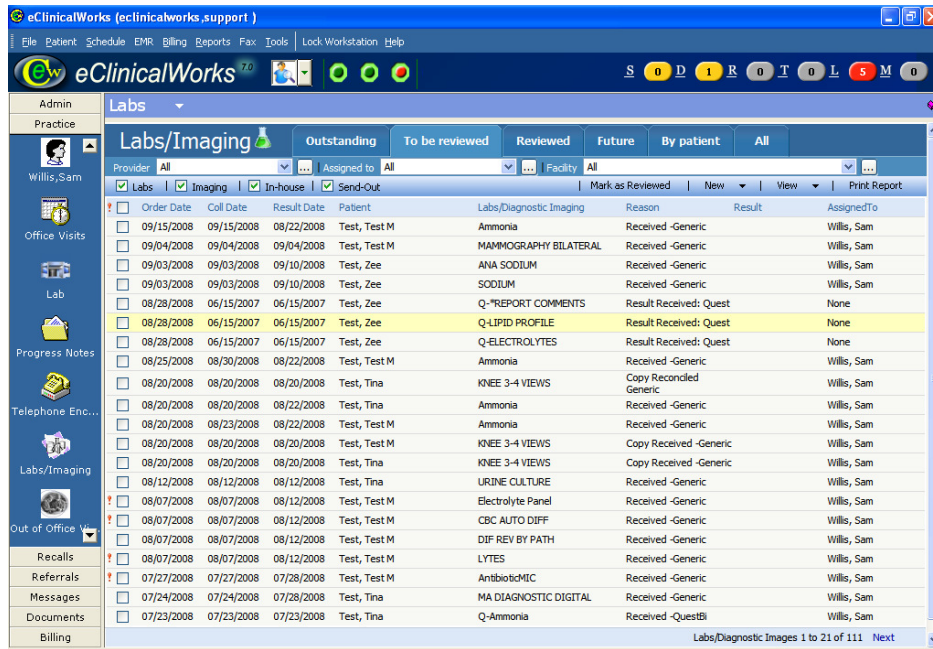
Various filters are available in this screen. You can filter by Provider, whom the order is assigned to, and by facility. A new feature in 9.0 allows the user to their preference as a default to save the filtering options selected.

When 'Electronic' (shown above) is checked, it will list all orders that have been transmitted electronically to the lab company but pending to be resultated.

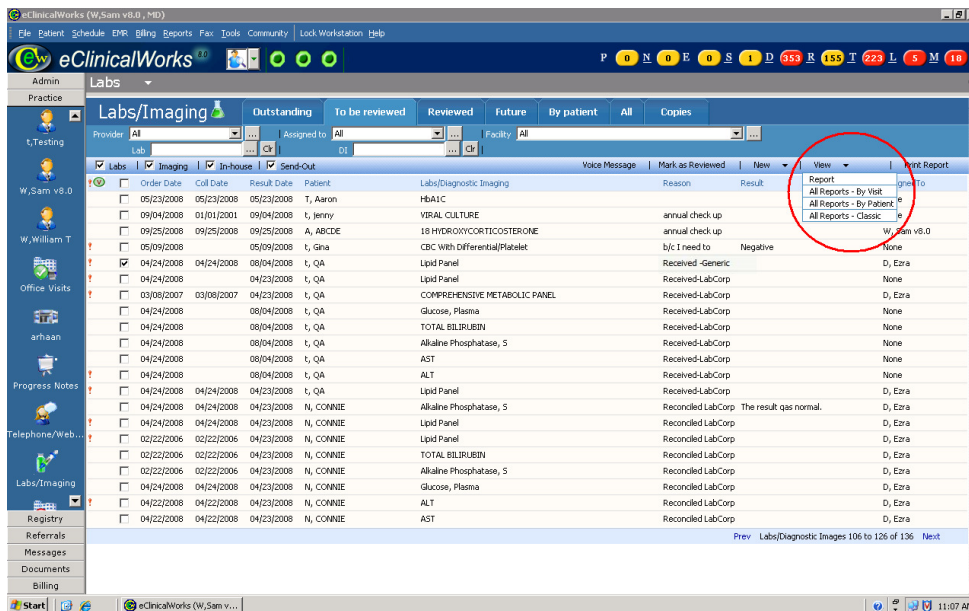
A provider can also filter by a specific lab, DI, or a procedure. The provider can also select if only in-house labs should be displayed. In 9.0, the provider can filter by high priority as well.



When the electronic results come in, the lab moves from 'Outstanding' to 'To be Reviewed'. You can click on the lab you want to review and it will open up the Lab result. Once you are done, you can click on Reviewed. The lab will get locked and will be moved to 'Reviewed.'



You have the option of viewing either all the lab results from one visit or all the lab results for that patient collectively from the Labs/Imaging screen. Select the patient by clicking on the check box and then go to View -> All Reports – By Visit or All Reports – By Patient.



This will display all the lab results that came back on one visit for this patient.



From this screen, you can view all the results, assign them to one individual, and can review them simultaneously. You also have the ability to view and add individual notes for each of the labs.

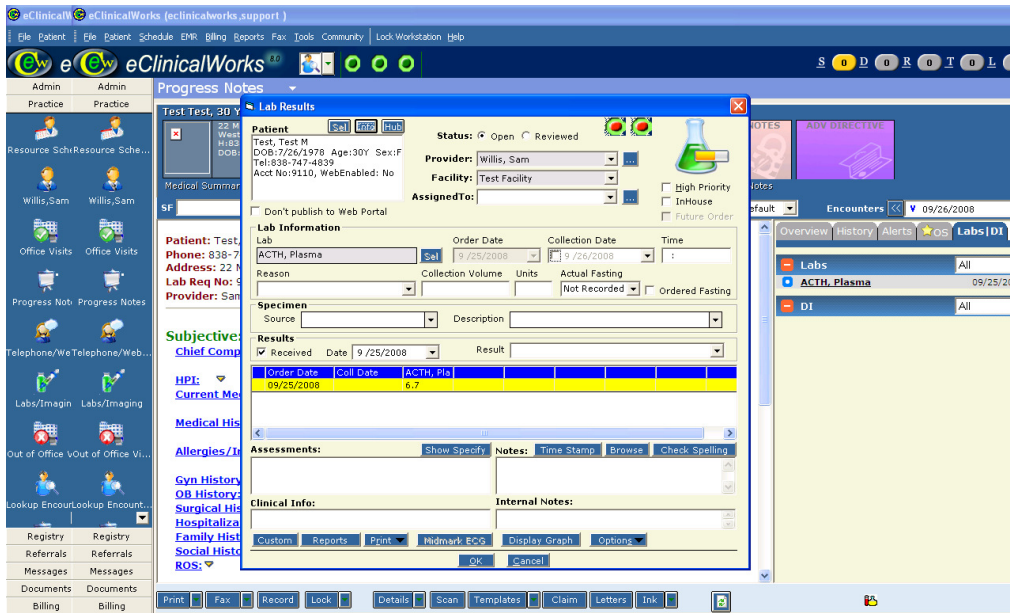
## Viewing past results on current Progress Note

In order to view past reviewed lab results on a current progress note, they must be transferred over.

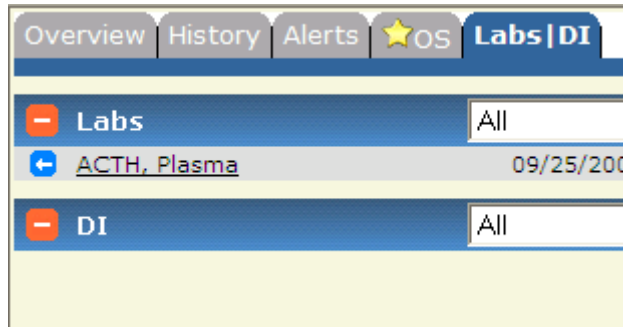
On the current progress note, select the Labs/DI tab from the right panel. Select 'All' from the drop down and all labs done for this patient will display.



Clicking on the lab name (e.g. ACTH, Plasma) will open up the lab result screen



In order for this lab to be transferred onto the current progress note, it must be marked as 'Reviewed'. After a lab is reviewed, it will display under the lab with a blue arrow.



Click on the arrow to transfer to the current progress note. The lab, along with the values from the yellow grid, is moved onto the progress note under the 'Past Results' section and is removed from the 'Labs/DI' tab.



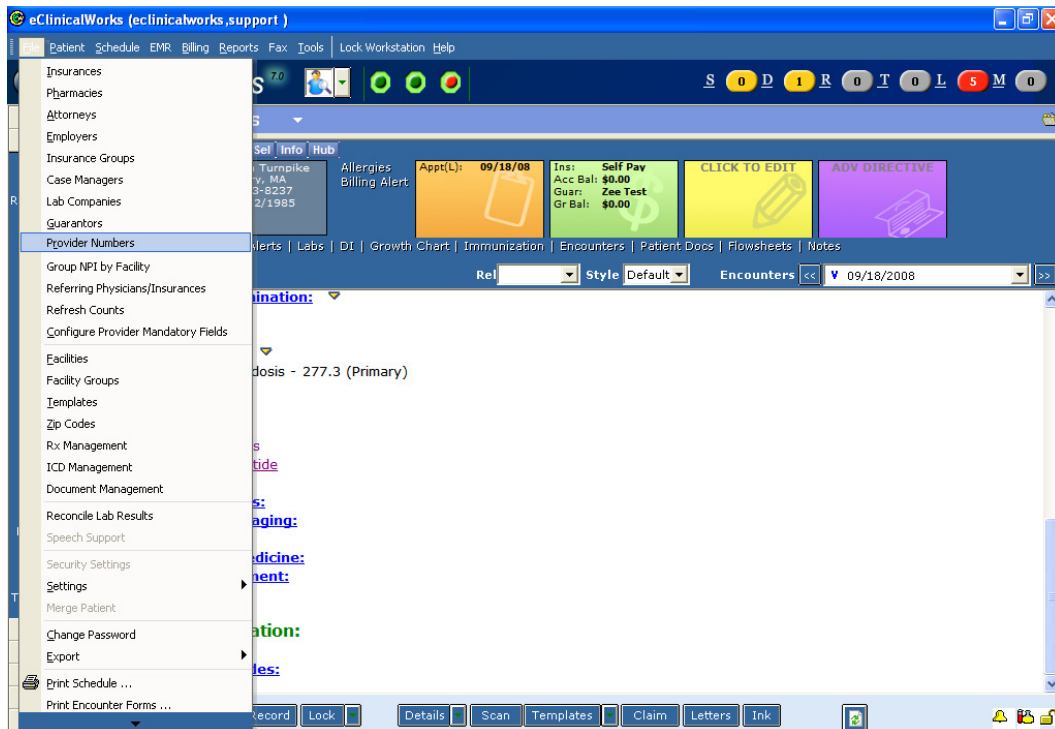


**NOTE:** The labs do remain on the original progress note as well.

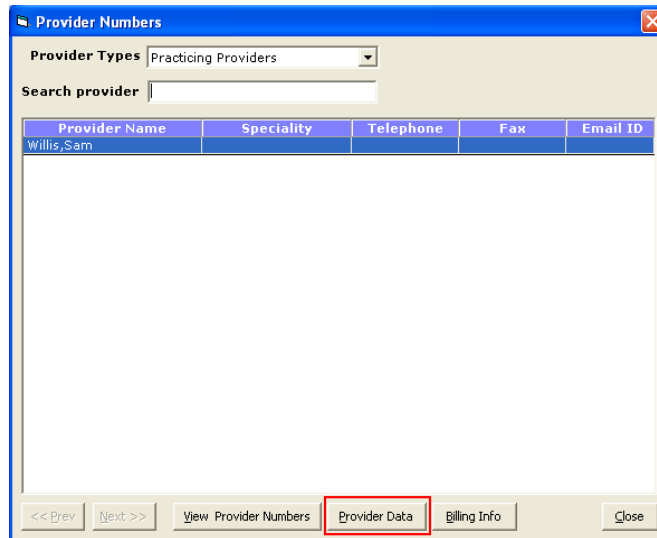
## Default Lab Assistant

By default, any lab orders made within eClinicalWorks will not be assigned to any user. By setting default lab assistant for each provider, all the orders made by the provider can be automatically sent to the assigned lab assistant (e.g. a nurse).

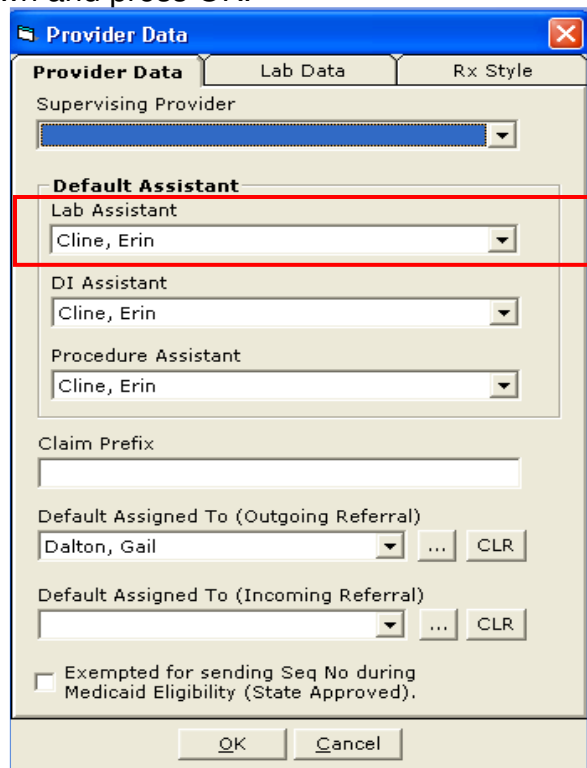
To set up default lab assistant for each provider, go to File -> Provider Numbers



Select the provider and click on Provider Data



From the first tab 'Provider Data', select the individual from the 'Default Lab Assistant' drop down and press OK.

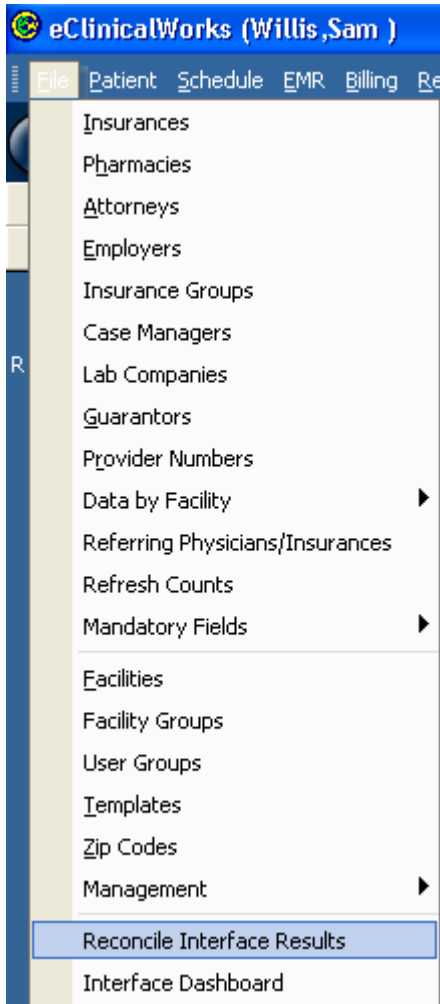


For all labs ordered under this provider, the orders will be assigned to this individual if this setting is in place.

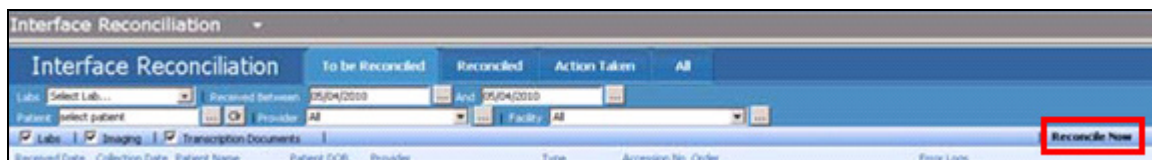
All results can also be assigned to one individual. **eClinicalWorks must be contacted to have this setup.**

## Reconciliation

To get a report of the failed results in eClinicalworks, a reconciliation report can be run. There is a new menu for the Reconciliation screen. Go to File -> Reconcile Interface Results.



The Interface Reconciliation window opens:



**Note:** Users must have access to the *Interface Reconciliation View* security attribute in order to access this feature. If user has access to the *Interface*

*Reconciliation-Electronic* security attribute, then they will have access to the 'Reconcile Now' button in the upper right corner.

In the interface reconciliation window the following tables display:

- **To be Reconciled** – Displays electronic results that have not been reconciled
- **Reconciled** – Displays electronic results that have already been reconciled
- **Action Taken** – Displays electronic results that have had actions taken on them
- **All** – Displays all lab results.

Select the Lab Company from the drop-down list and select the date range for which you want to reconcile from the filters provided. If you want to reconcile for a specific patient, then select the patient from the ellipsis. The user also has the option of viewing failed results for a specific provider and for a specific facility.

To exclude specific types of orders from your results, uncheck any of the following boxes: labs, imaging, transcription documents.

Once all the options have been set, the results that match the selected criteria will display:



On the 'To be Reconciled' table, results can be reconciled automatically in batches by clicking on the 'Reconcile Now' button. All current results are reconciled.

**Note:** Failed messages that have not been reconciled for a certain number of days on the 'To be Reconciled' tab are marked with a red exclamation mark. This indicates that the provider has not reconciled the results and needs to open the message and reconcile it. This feature is enabled by request and provider can indicate after how many days the result should be marked.

In the 'To be Reconciled' table, the following errors can be found:

- Patient Match Not Found
- Provider Match Not Found
- Patient and Provider match not found

- Test Code not found in HL7 file
- Unique specimen number not found

The provider or a user can manually reconcile the results for the first 3 types of errors shown above (Patient Match Not Found; Provider Match Not Found; Patient and Provider match not found).

Manual reconciliation can be done individually by clicking on the result. When clicked upon, the failed result window opens:

(FINAL RESULT)

**WESTBOROUGH MEDICAL ASSOCIATES**  
Ste. 200  
112 Turnpike Road

Requesting Physician: Wills, Sam  
Patient: test,lab DOB: 01/01/1999 Sex: M Tel:  
Lab: Open Test  
Accession ID: 53510  
Order Date: Collection Date: 05/31/2008 Time: 17:26:00  
Specimen Source: Specimen Description:

Name	Value	Reference Range
- Test was requested by Dr Willis		
- Test was performed at lab		
F GLUCOSE	82	70 - 110 MG/DL
F BUN	9	L 10 - 26 MG/DL
F CREATININE	0.8	0.6 - 1.6 MG/DL
F BUN/CREAT RATIO	12.5	
F CALCIUM	10.8	H 8.3 - 10.6 MG/DL
F SODIUM	137	135 - 145 MEQ/L
F POTASSIUM	4.4	3.5 - 5.0 MEQ/L
- Reference Range has been updated		
F CHLORIDE	104	98 - 108 MEQ/L
F CARBON DIOXIDE	25	23 - 33 MEQ/L

**THIS REPORT IS NOT PART OF THE PATIENTS ELECTRONIC MEDICAL RECORD.  
RESULT WAS RECEIVED THROUGH THE LAB INTERFACE FROM LABGENERIC AND  
FAILED TO ATTACH TO A PATIENT**

Patient: test,lab DOB: 01/01/1999

Notes [TimeStamp] [Browse...]

Reconcile

Patient [ ]

Provider Wills, Sam D

Status:  Open  Action Taken

[Print] [OK] [Cancel]

- **Patient Match Not Found** – the patient name for the lab does not match any patient names in the system. Selecting the correct patient from the database by clicking on the ellipsis next to it will resolve the problem.

Once the problem is resolved, click the Reconcile button. For Patient Match Not Found, the lab window opens for the selected patient and displays the list of labs for the patient. Perform one of the following actions:

- Select a lab order for which results has been electronically received but not posted
- Select a lab for which results have not been received.
- Click 'Attach to New Order' to attach results to a new lab order.

Click on yes for confirmation. The reconciled lab is moved from 'To Be Reconciled' tab to the 'Reconciled' tab. Result will display in patients labs with message 'Manually Reconciled – Lab Company'

The screenshot shows a 'Lab Results' window with the following details:

- Patient:** Durana, Dorisa; DOB: 4/19/1942; Age: 69Y; Sex: M; Tel: 555-555-5516; Acct No: 9307, WebEnabled: No.
- Status:** Open (radio button selected).
- Provider:** Willis, Sam
- Facility:** Westborough Medical Assoc
- AssignedTo:** Willis, Sam
- Options:**  High Priority,  InHouse,  Future Order.
- Lab Information:**
  - Lab: RENAL FUNCTION PANEL W/EGFR
  - Order Date: 12/3/2008
  - Collection Date: 12/3/2008
  - Time: 08:37 AM
  - Reason: Manually Reconciled - Westbor (highlighted in red)
  - Actual Fasting: Not Recorded
  - Ordered Fasting

**Note:** The changes cannot be undone once the result is manually reconciled. Use this option carefully.

- **Provider Match Not Found** – the provider name for the lab does not match any provider names in the system. Selecting the correct provider from the database by clicking on the ellipsis next to it will resolve the problem.
- **Patient and Provider match not found** – both the patient and the provider for the lab do not match in the system. Selecting the correct patient and the provider from the database by clicking on the ellipsis corresponding to each of it and hitting Reconcile will resolve the problem.

The below are the ways to fix the other issues in the 'To be reconciled' table.

- **Test Code not found in HL7 file** – the correct lab code must be entered on the Lab Code window (discussed in earlier section). Then select the lab result and click on the Reconcile Now button on the Interface Reconciliation window.

Interface Reconciliation									
To be Reconciled		Reconciled		Action Taken		All			
Labs	Westborough Medical Cent	Received Between	01/01/2004	And	06/01/2011				
Patient	select patient	Provider	All	Facility	All				
<input checked="" type="checkbox"/>	Labs	<input checked="" type="checkbox"/>	Imaging	<input checked="" type="checkbox"/>	Transcription Documents			<b>Reconcile Now</b>	
Received Date	Collection Date	Patient Name	Patient DOB	Provider	Type	Accession No	Order	Error Logs	
10/12/2010	10/08/2010	DURANA, DORISA	04/19/1942	WILLIS,SAM (WSAM)	LAB	ST296852F		Test Code not found in HL7 file	
10/12/2010	10/08/2010	DURANA, DORISA	04/19/1942	WILLIS,SAM (WSAM)	LAB	ST296852F		Test Code not found in HL7 file	

- **Unique specimen number not found** - each orders that are sent out will have a unique specimen number attached to it. The same specimen number should be sent back with the result for it to match with the order. If that specimen number is not found then the lab company should be notified about it and they should send the result back with the specimen number. If it is not a vendor issue, contact eClinicalWorks.

### Matching Criteria:

The initial matching criteria are the requisition number and patient date of birth. If there is a mismatch on either of these, then the patient's last name, first name, and date of birth are checked (along with the ordering provider). If there is a mismatch again, the result will fail and will display on this reconciliation report.

### Security Settings:

There are three security settings under File->Security Settings related to Interface Reconciliation

**Security Settings (Dr.Sam Willis)**

By User	By Security Attribute	By Facility
Security Settings	Hub - Problem List	<input checked="" type="checkbox"/>
Providers	Hub - Rx	<input checked="" type="checkbox"/>
Dr.Mary Jones	ICD Codes	<input checked="" type="checkbox"/>
Dr.Nurse Nurse	IHE Documents Access	<input checked="" type="checkbox"/>
Dr.test test test'o	Immunization Export User Setup	<input checked="" type="checkbox"/>
<b>Dr.Sam Willis</b>	Immunization Form	<input checked="" type="checkbox"/>
Staff	Immunization LotNumber Customization	<input checked="" type="checkbox"/>
A, Sharon L	Immunizations in Progress Notes	<input checked="" type="checkbox"/>
B, Jamie	Insurances	<input checked="" type="checkbox"/>
D, Debbie	Interface Dashboard	<input checked="" type="checkbox"/>
Deveraux, Isabeau	Interface Dashboard - Modify Mappings	<input checked="" type="checkbox"/>
E, Room	Interface Dashboard - View HL7 Transaction i	<input checked="" type="checkbox"/>
eclinicalworks, sup	<b>Interface Reconciliation - Electronic</b>	<input checked="" type="checkbox"/>
G, Darjon	<b>Interface Reconciliation - Manual</b>	<input checked="" type="checkbox"/>
Herrington, Lisa	<b>Interface Reconciliation - View</b>	<input checked="" type="checkbox"/>
J, Mary	Lab Alias	<input checked="" type="checkbox"/>
J, Dana	Labs	<input checked="" type="checkbox"/>
K, Joffia	Lock Chart	<input checked="" type="checkbox"/>
Lab, Tech	Lock Lab Result Grid	<input checked="" type="checkbox"/>
M, Shannon	Lock Refunds	<input checked="" type="checkbox"/>
M, Donna A	Manage access to account action codes	<input checked="" type="checkbox"/>
	Manage access to adjustment codes	<input checked="" type="checkbox"/>

Rx Security    Configure Categories    Locked Users    Configure Template    Copy Template    Save    Close

Checked and greyed options have permissions

**Interface Reconciliation – Electronic:** Grants or denies users permission to reconcile failed electronic results using the Reconcile Now button (File menu > Reconcile Lab Results > Reconcile Now button).

**Interface Reconciliation – Manual:** Grants or denies users permission to manually reconcile failed electronic results (File menu > Reconcile Lab Results).

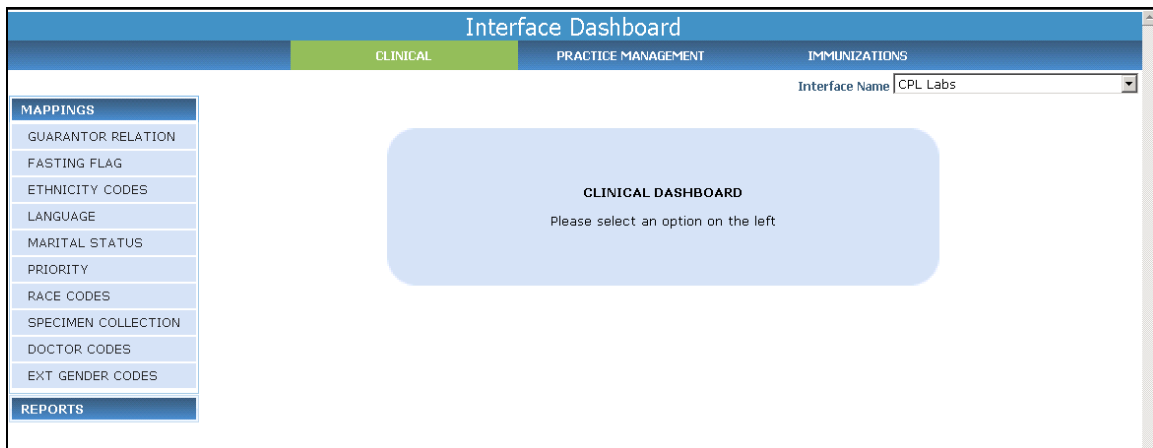
**Interface Reconciliation – View:** Grants or denies users permission to access the Interface Reconciliation window in Web view (File menu > Reconcile Lab Results).

## Interface Dashboard

The Interface Dashboard provides a place to configure mappings and view reports for various lab, practice management, and immunization interface elements. The lab elements will be discussed below.

To get to the Interface Dashboard, go to File -> Interface Dashboard option. The Interface Dashboard window opens with the 'Clinical' tab selected by default. This tab refers to the lab elements.

Select an interface from the Interface Name drop-down list:



### Configuring Clinical Mappings:

eClinicalWorks items can be mapped to external codes provided by the interface vendor. These mappings are done during install time and should not be changed unless indicated by the provider. The following items can be mapped:

- Guarantor Relations

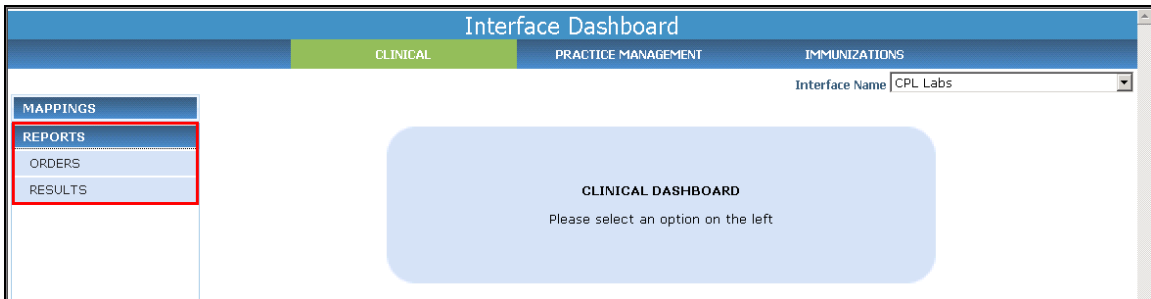


- Fasting
- Ethnicity Codes
- Language
- Marital Status
- Priority
- Race Codes
- Specimen Collection
- Doctor Codes
- External Gender codes

Confirm with vendor before making any changes. Click on OK to save the changes.

### Running Clinical Reports:

Reports on lab orders and results can be run from the Clinical Tab.



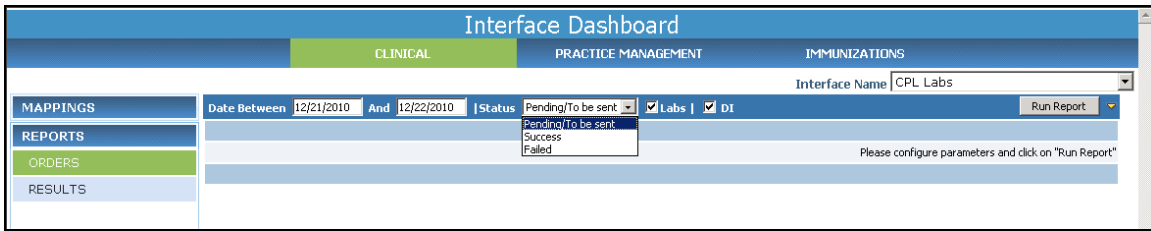
### Orders

The Orders report includes information about the lab orders sent from eClinicalWorks to the lab companies.

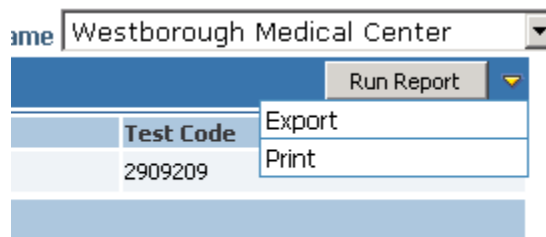
Click on the Orders option. The Orders report options display. Select the date range and a transmission status. To exclude labs or diagnostic imaging, uncheck the Lab and/or DI box. Then click Run Report'. The lab order information that meets the selected criteria displays.

The different statuses are

- **Pending to be sent** – displays orders which have been transmitted but not sent yet
- **Success** – displays successfully transmitted orders
- **Failed** – displays failed transmissions.



**Note:** To export or print this report, click the yellow arrow icon to the right of the Run report button to open a drop-down list, and then click the Export or Print option.



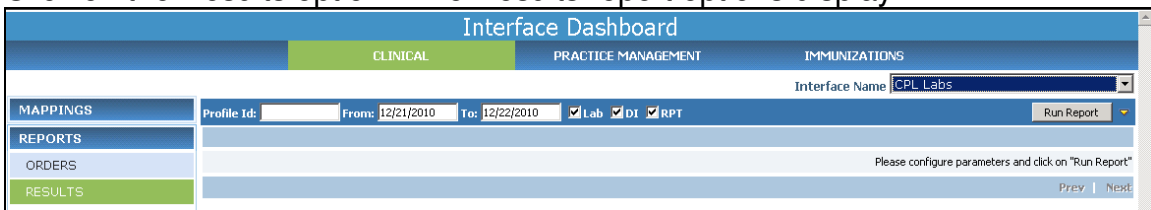
The status will be failed for the following reasons:

- Connectivity issues
- Interface is not configured properly

## Results

The Results report includes information about lab results sent from the lab companies to eClinicalWorks.

Click on the Results option. The Results report options display.



To view a report on specific results, enter the results accession number in the Profile Id box. It is the unique specimen number given for each test. The provider can also select a date range and can exclude Lab, DI, or Procedures by unchecking the respective boxes. Then click on 'Run Report'. The lab result information that meets the selected criteria will display.

The different statuses that can be noted on a results report are:

- **Passed**

Date Received	Patient Name	Test Name	Profile Id	Date of Birth	Order Type	Status
10/11/2010	DURANA, DORISA	EXR CHEST PA AND LAT	1901475	04/19/1942	RAD	Passed
10/11/2010	DURANA, DORISA	CT SINUS FACIAL W/O	73661740000100	04/19/1942	RAD	Passed

- **Failed** – Results fail to attach due to match for provider or patient not found or lab or specimen code information missing

Date Received	Patient Name	Test Name	Profile Id	Date of Birth	Order Type	Status
10/12/2010	DURANA, DORISA		ST296852F	04/19/1942	LAB	Failed

- **Manually reconciled** - if the results were manually reconciled from File->Reconcile Interface Result.

Date Received	Patient Name	Test Name	Profile Id	Date of Birth	Order Type	Status
10/11/2010	DUR, LISA	RENAL FUNCTION PANEL W/JEGR	ST297022F	04/19/1942	LAB	Manually reconciled
10/11/2010	DUR, LISA	URINALYSIS, COMPLETE W/REFLEX TO CULTURE	ST297022F	04/19/1942	LAB	Manually reconciled
10/11/2010	DUR, LISA	CBC (INCLUDES DIFF/PLT)	ST297022F	04/19/1942	LAB	Manually reconciled

- **Failed after reconciliation** – if the information entered before reconciling were incorrect.

Date Received	Patient Name	Test Name	Profile Id	Date of Birth	Order Type	Status
10/11/2010	DUR, LISA	REFLEXIVE URINE CULTURE	ST297022F	04/19/1942	LAB	Failed after reconciliation
10/11/2010	DUR, LISA	CULTURE, URINE, ROUTINE	ST297022F	04/19/1942	LAB	Failed after reconciliation

- **Result not processed** – if there are formatting issues in HL7 specs or interface is not configured properly.

This report can be exported or printed but clicking on the arrow next to Run Report.

Date Received	Patient Name	Test Name	Profile Id	Date of Birth	Order Type	Status
12/21/2010	test, LISA	highlight	0023tlda8	12/12/1961	LAB	Failed
12/21/2010	test, LISA	highlight	0023tlda8	12/12/1961	LAB	Failed
12/21/2010	TEST, med	CBC UNASSDIFF:2202		12/12/1960	LAB	Failed

If the security attribute 'Interface Dashboard – View HL7 Transaction in reports' is enabled, then provider can view the HL7 message received from the vendor by clicking on the result.

The screenshot shows the 'Interface Dashboard' with a 'RESULTS' tab selected. A table displays report data with columns: Date Received, Patient Name, Test Name, Profile Id, Date of Birth, Order Type, and Status. The third row is expanded to show an 'HL7 Transaction' window. The window title is 'HL7 Transaction' and it contains a 'Message Content' field with the following HL7 text:   
MSH|^~|^&MIC|NOB^|CDB|200609181559|MICRO|ORU^R01|5561D|2.3|PID|1|N124|N0000106|TEST^med|119601212|F||C101 STOCKTON DRIVE^NORTH ADAMS^MA^01247^|[(413)555-9731|CATNC|N00000172|973-19-7315|PVI|1|O|LAB^N0B|WY99898||000100^Butler^Internist^E^Dr^MD^|PR|REG REF|COM^|1|1|1|1|1|1|1|1|1|1|200608071539|1|0001111^Henter^Test^E^Dr^MD^|E|PD1|1|0001111^Henter^Test^E^Dr^MD^|E|OBR|1|umassW|umass^CBC UNASSDIFF.2202^DIFFERENTIAL REFLEX|200810101041|1|1|1|1|1|1|WSAM^Henter^Test^E^Dr^MD^|E|NORTH ADAMS REGIONAL HOSPITAL||F|OBX|1|CE|L200.0200^WBC^L200.0200^WHITE BLOOD COUNT|1|SAPRO1^SAPROPHYTIC FUNGUS|CMM|4.5-13.0|N|C|OBX|2|ST|L200.0300^RBC^L200.0300^RED CELL COUNT|1|15.00^7.00|CMM|4.2-5.4|N|C|OBX|3|L|L200.0400^HGB^L200.0400^HEMOGLOBIN|1|1.0|G|DL|11.1-15.7|L|C|OBX|4|L|L200.0500^HCT^L200.0500^HEMATOCRIT|1|34.0|^%|34.0-44.0|N|C|OBX|5|L|L200.0600^MCV^L200.0600^MEAN CORPUSCULAR VOLUME|1|81.0|fL|81.0-99.0|N|C|OBX|6|L|L200.0700^MCH^L200.0700^MEAN CORPUSCULAR HEMOGLOBIN|1|34.0|PG|N|C|OBX|7|L|L200.0800^MCHC^L200.0800^MEAN CORPUSCULAR HGB CONCENTRA|1|36.0|G|DL|N|C|

## Additional Features

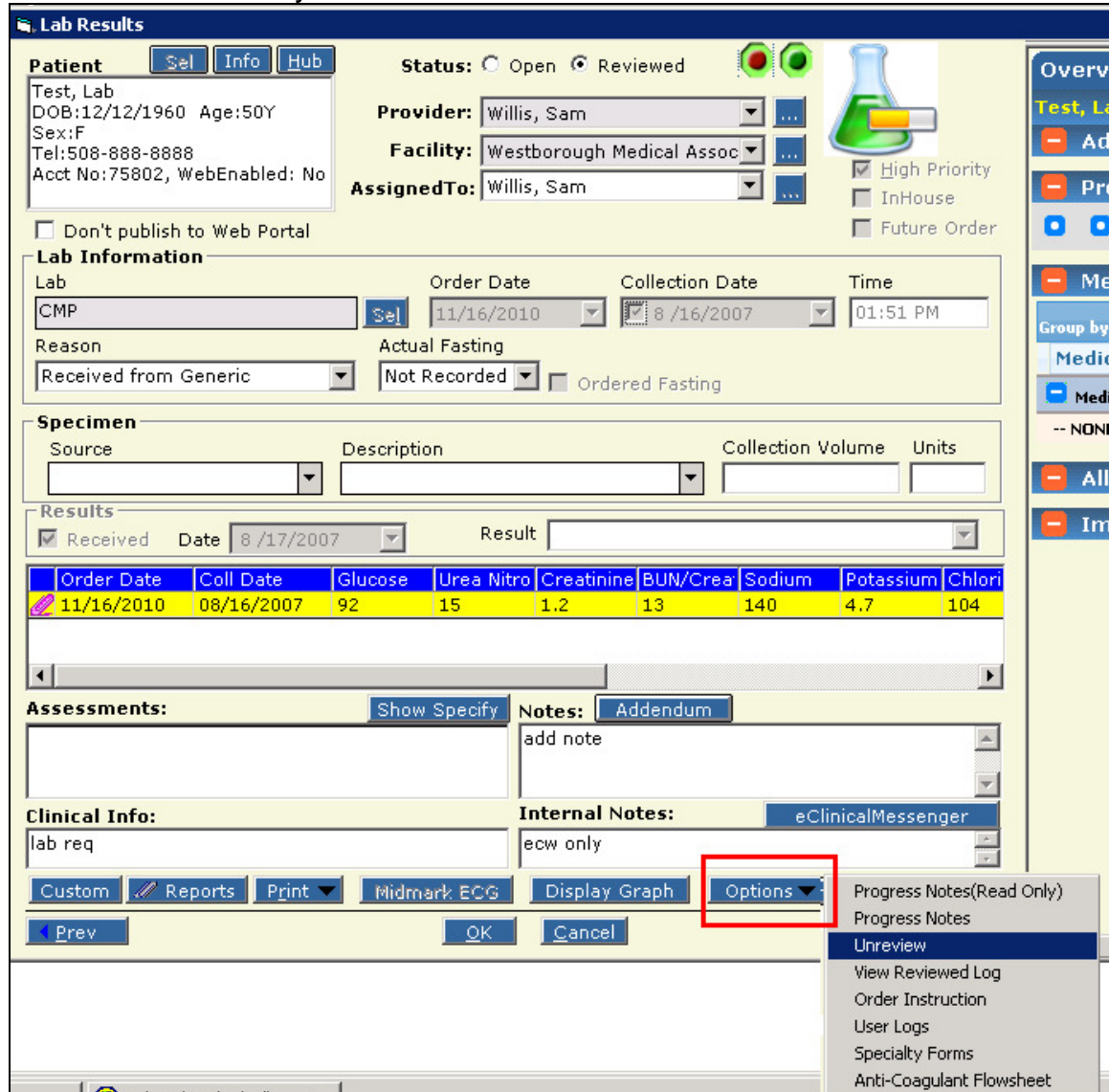
### Unreviewing a Reviewed Lab:

The security attribute, 'Unreview Labs/DI/Procedure' has been added to the Security Settings window to enable the user to open and mark a previously reviewed lab as unreviewed.

To mark reviewed labs as not reviewed, go to File -> Security Settings. Select 'Unreview Labs/DI/Procedure' security key. Assign the security setting to a user who can access the feature:

The screenshot shows the 'Security Settings' window. The 'By Security Attribute' tab is active. A tree view on the left lists various security attributes. The attribute 'Unreview Labs/DI/Procedure' is highlighted, and a tooltip shows its description: 'Unreview a reviewed Lab or DI or Procedure'. The 'User Name' and 'Permission' columns are visible but empty. 'Save' and 'Close' buttons are at the bottom.

To unreview a reviewed lab, select a reviewed lab from the Labs/Imaging screen and open it. The Lab Result window will open. Click on the Options button on the bottom of the window and click on Unreview. A pop-up message will display. Select Yes. The lab will now be marked as unreviewed and the Open button is selected automatically.



## Practice Defaults Settings

**To display lab results on Progress Notes:**

1. From the File menu, hover over the Settings option to open a drop-down list.
2. From the drop-down list, click the Practice Defaults option. The Practice Defaults window opens.
3. Click the Labs tab to display the Labs options.

#### 4. Check the Show Lab Results on Progress Notes box:

Practice Defaults

Default values set here will be applied to all computers in all offices across the practice. Please make sure to choose proper defaults.

Front Office | Mid Office | Interface | General | Labs | Styles | Performance | Portal | Options | Scanning/Printing

- All orders must be associated with assessment(s) while ordering
- Change appointment provider to ordering provider when transferring lab from future to current visit
- Allow ONLY selection of specimen source and description in lab review
- Show ONLY outstanding and unreviewed Future Orders in order screen
- Select 'Specimen Collection' for current labs while transmitting
  - Option must be enabled for the supporting lab interface.
- Select the logged in provider as the default provider while ordering labs from virtual visits
- Mark In House lab as received if results are entered manually
- Do not allow transfer of reviewed future orders to current visit.
- Show notes on Progress Notes for Past Results
- Show Lab Results on Progress Notes
  - Show Labs/DI/Procedures notes
  - Show only In-House labs results

**Lab Results**

- Assign results to referring provider
  - Assigns to ordering provider if referring provider is an external provider
- Enable 'Result Based Billing' interface (MUST be enabled for the interfaces as well)
  - CPTs and diagnosis codes are associated with lab codes upon arrival of the result.
- Send copies of lab results to providers in the 'CC list' (internal providers ONLY)
  - Option must be enabled for the supporting lab interface.

**Lab/DI Default Company**

Lab Company: None

DI Company: None

- User level default will overwrite the above selection.

**Default Bill To Physician Account**

Lab Company: Never

DI Company: Never

Save Setting for Future Orders

**Lookup Date Range For Viewing**

Lab Cumulative Report: 0 days

View All Reports by Patient: 0 days

Maximum number of reports for the same test in Cumulative Report: 5

- Web View of Cumulative Report must be enabled

OK Cancel

5. Check one or both of the following boxes as appropriate (these options are only available if the Show Lab Results on Progress Notes box is checked):

**Show Labs/DI/Procedure notes** - Display notes for lab, diagnostic imaging, and procedures on the Progress Notes window (in the Treatment section, under the associated lab).

**Show only In-House labs results** - Display results ONLY for In-House labs. Results for labs that are sent out to a lab company are not displayed. If a lab is marked as in-house and this Practice Default option is checked, then results for those lab orders will be displayed in Progress Notes, but results for labs that are not marked as in-house, will not display in Progress Notes.

6. Click the OK button. The lab results and notes are displayed or hidden as configured.

#### Configuring the Default Bill to Physician Status for Labs:

Configure the default setting for 'Bill to Physician' option for labs and diagnostic imaging tests from Practice Defaults.

1. From the File menu, hover over the Settings option to open a drop-down list.
2. From the drop-down list, click the Practice Defaults option. The Practice Defaults window opens.
3. Click the Labs tab. The Lab options display.

4. Select one of the following options from the Lab Company and DI Company drop-down lists:
  - **Never** - The Bill to Physician box is unchecked by default.
  - **Always** - The Bill to Physician box is checked by default.
  - **Self-Pay/No Insurance** - The Bill to Physician box is only checked when the patient is marked as Self-Pay or has no insurance.
5. To use these settings on future labs as well, check the Save Setting for Future Orders box.
6. Click OK. The default Bill to Physician status is configured.

### Configuring the Default Lookup Date Range for Cumulative Reports

1. From the File menu, hover over the Settings option to open a drop-down list.
2. From the drop-down list, click the Practice Defaults option. The Practice Defaults window opens.
3. Click the Labs tab. The Labs options display.

4. Enter the number of days in the fields in the Lookup Date Range for Viewing section:

Practice Defaults

Default values set here will be applied to all computers in all offices across the practice. Please make sure to choose proper defaults.

Front Office | Mid Office | Interface | General | Labs | Styles | Performance | Portal | Options | Scanning/Printing

All orders must be associated with assessment(s) while ordering

Change appointment provider to ordering provider when transferring lab from future to current visit

Allow ONLY selection of specimen source and description in lab review

Show ONLY outstanding and unreviewed Future Orders in order screen

Select 'Specimen Collection' for current labs while transmitting  
- Option must be enabled for the supporting lab interface.

Select the logged in provider as the default provider while ordering labs from virtual visits

Mark In House lab as received if results are entered manually

Do not allow transfer of reviewed future orders to current visit.

Show notes on Progress Notes for Past Results

Show Lab Results on Progress Notes

Show Labs/DI/Procedures notes

Show only In-House labs results

**Lab Results**

Assign results to referring provider  
- Assigns to ordering provider if referring provider is an external provider

Enable 'Result Based Billing' interface (MUST be enabled for the interfaces as well)  
- CPTs and diagnosis codes are associated with lab codes upon arrival of the result.

Send copies of lab results to providers in the 'CC list' (internal providers ONLY)  
- Option must be enabled for the supporting lab interface.

**Lab/DI Default Company**

Lab Company: None

DI Company: None

- User level default will overwrite the above selection.

**Default Bill To Physician Account**

Lab Company: Never

DI Company: Never

Save Setting for Future Orders

**Lookup Date Range For Viewing**

Lab Cumulative Report: 0 days

View All Reports by Patient: 0 days

Maximum number of reports for the same test in Cumulative Report: 5

- Web View of Cumulative Report must be enabled

OK Cancel

Note: The default for these two fields is set to 180 days; if zero (0) is entered, the default of 180 days will be applied.

5. Click the OK button.

The default date range for Cumulative Reports is configured.

### Specifying the Default Lab Company

Specify the lab company or diagnostic imaging company selected by default from Practice Defaults. This will apply to entire practice. This option affects the windows access from the following locations:

- EMR menu > Labs
- EMR menu > Diagnostic Imaging
- Progress Notes window > Lab Reports
- Progress Notes window > Diagnostic Imaging
- Progress Notes window > Treatment heading > Printing Labs or Diagnostic Imaging

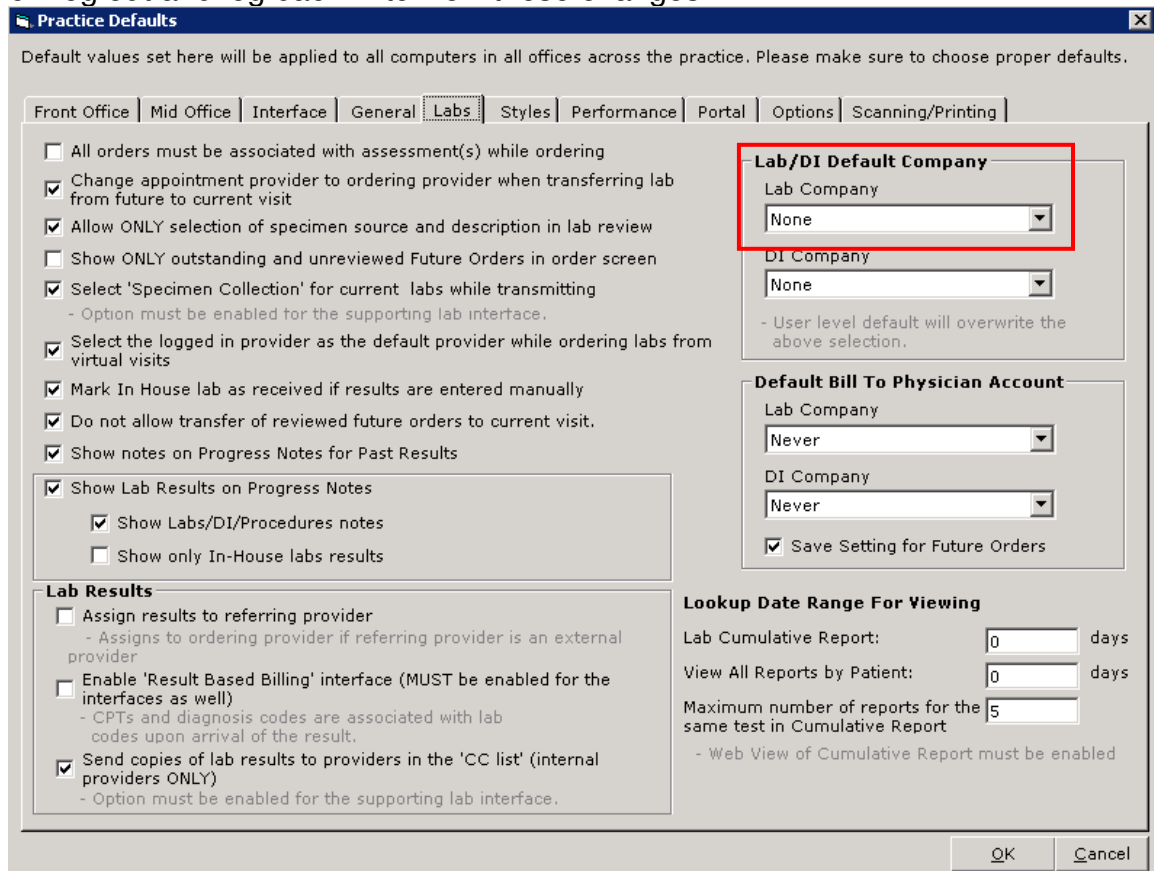


- Progress Notes window > Treatment heading > Faxing Labs or Diagnostic Imaging
- Progress Notes window > Treatment heading > Transmitting Labs or Diagnostic Imaging

**To specify a default lab company:**

The Practice Defaults window opens. Specify the lab company selected by default from Practice Defaults. This option affects the windows access from the following locations:

1. From the File menu, hover over the Settings option to open a drop-down list.
2. From the drop-down list, click the Practice Defaults option.
3. Click the Labs tab. The Lab options display.
4. Select the lab company from the Lab Company drop-down list.
5. Click the OK button. The default diagnostic imaging company is specified.
6. Log out and log back in to view these changes.



The same setting can also be configured per user from progress note of a patient.

1. From the progress note of a patient click on Lab Reports.
2. Click on My Defaults and My Lab/DI Orders window opens.
3. Select a Lab company from the drop down.

