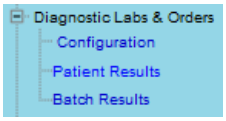
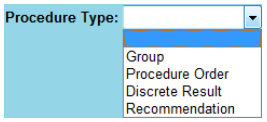
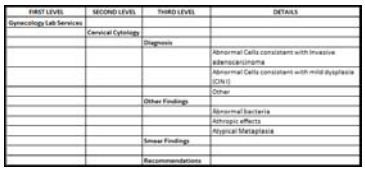
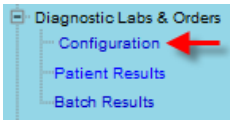
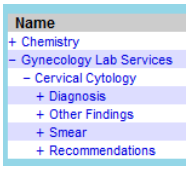
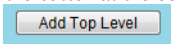
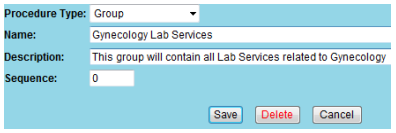
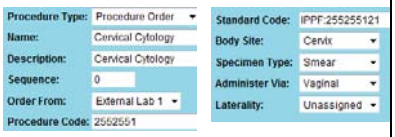
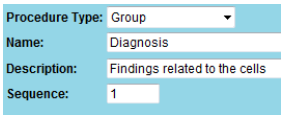
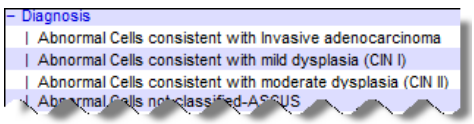
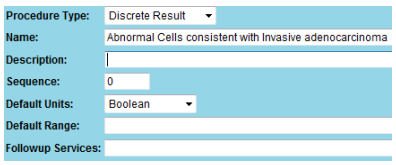
PROCESS DESCRIPTION – VERSION 4.0 (June 2010)

ROLES: IT MGR / CMIS STEERING COMMITTEE SUPERVISION	PROCESS 4.5.1: LABORATORY CATALOGUE CONFIGURATION

#	Step	Observations	Menu options or screen information
0	**Preliminary steps:** Before configuring the Diagnostic Lab & Orders module, you need to: 1. Define Lab service location(s) either within the clinic or external, with the Miscellaneous > Address Book 2. Check and adjust default settings related to Lab tests (Procedures) in Administration>Lists	Configuring the Diagnostic Lab & Orders module is a highly technical task that must involve Medical Senior Staff and the CMIS Steering supervision, with the support of IT staff. Once the configuration is completed, lab staff, nurses or other clinicians can easily use this module	**Note**: The following Diagnostic Lab & Orders function are available from OpenEMR version 3.1.1.7 onward. Please check with your system admin about system version 
1	**Laboratory Test Structure** This module has been designed to use a 3-level structure of Procedure Types: 1st (Top) Level: **Group level** 2nd Level: Procedure **Order level** 3rd Level: Discrete **Results level**	• **Group Level**: Can be a location or a particular classification of Lab Tests • **Procedure Order Level**: Specific test order (eg. Cervical cytology, HIV test..) • **Discrete Results Level**: Possible results from test. This level can in turn include groups such as: Diagnosis, Other Findings, Recommendations, etc.	
2	**Configuration** •Select Diagnostic Lab & Orders > Configuration **Best Practice**: As in other procedures, it is a good practice to have a 3-level Excel table with all Groups, Order types, Results, etc., before using this OpenEMR function		
3	**Example: Configuring a Gyn Lab Service** We will now configure the three levels of Cervical Cytology, including the following elements: 1st (Top) Level: Gynecology Lab Services 2nd Level: Procedure Order Cervical Cytology 3rd Level: Discrete Results level (in 4 groups) Discrete results details		**Note**: In this example, the Cervical Cytology procedure has been subdivided in 4 groups to illustrate tool flexibility: • Diagnosis • Other Findings • Smear sample • Recommendations
4	**Example: Configuring the 1st Top (Group) Level** The first step to create a group of tests is to set the Top Level, by selecting the button at the Configuration page: 	**Procedure type**: Group **Name**: Group Label (Gyn Lab Services) **Description**: Short explanation **Sequence**: Numeric value to organize the ordering in the main lab screen (0 in this case to locate group at the top of group)	
5	**Example: Configuring the 2nd Order Level** The Lab service is configured as follows: **Procedure type:** Procedure Order **Name:** Test to be ordered (eg. Cervical Cytology) **Description:** Short description of test **Sequence:** Numeric value to organize the ordering in the main lab screen (0 in this case to locate group at the top of Order Level group) **Order from:** Location where test will be performed	**Procedure code:** MA code to identify the specific test **Standard code:** Standard IPPF service statistics code is suggested (mapping similar to services) **Body site:** where sample will be taken from **Specimen type:** Depending on test type **Administer via:** More related to immunization **Laterality:** Indicates side of body where the procedure will be done, i.e. X ray.	
6	**Example: Configuring the 3rd Results Level** OpenEMR allows the creation of a flexible structure adapted to clinic needs. In this example we subdivide de Lab Test into Diagnosis results (shown here), Other related findings, Smear sample findings and Recommendations.	**Procedure type:** Group (in the example, we are creating subgroups below the Order level) **Name:** Subgroup name (eg Diagnosis) **Description:** short description of group **Sequence:** Numeric value to organize the ordering in the main lab screen (1 in this case to locate group in the first place of group)	
7	**Example: Configuring the Discrete result details** Each detailed result will be configured as Discrete Result. In the example we show the first one 	**Procedure type:** Discrete Result **Name:** Specific result name **Description:** Brief description if relevant **Sequence:** Numeric value to organize the ordering in the main lab screen **Default units:** Data type (predefined in lists) **Default range:** Expected range (if any) for a normal result to compare with real results **Follow up services:** for those abnormal or results, a follow up service code can be added