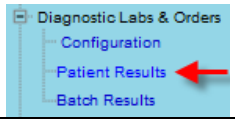
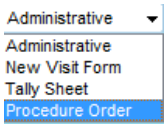
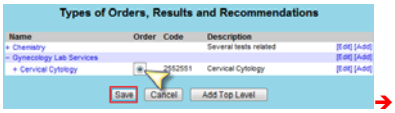
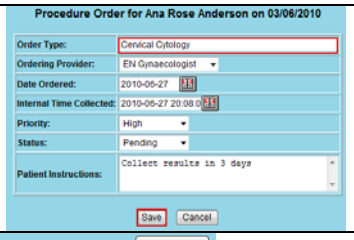
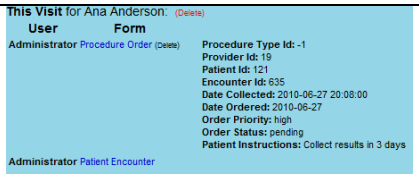
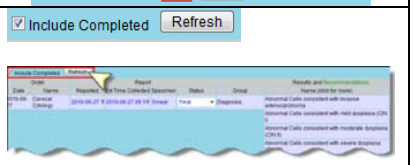
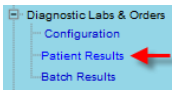
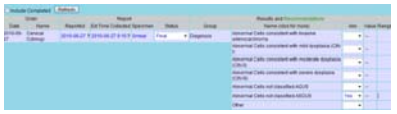
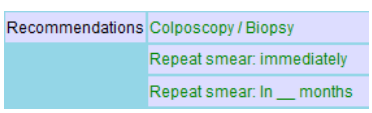
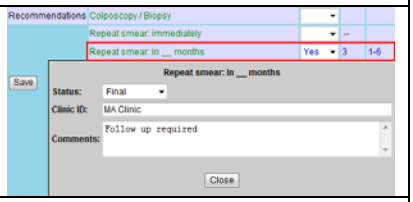
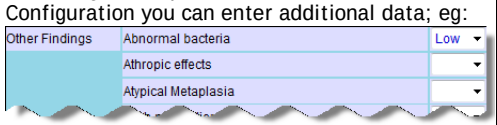
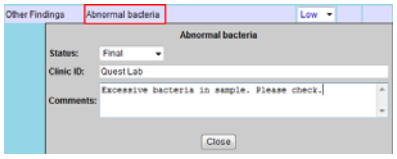
PROCESS DESCRIPTION – VERSION 4.0 (June 2010)

ROLES: LAB STAFF / NURSES	PROCESS 4.5.2: LABORATORY ORDERS & RESULTS

#	Step	Observations	Menu options or screen information
0	**Preliminary steps:** Before using the Diagnostic Lab & Orders function, you need to complete 3 preliminary steps: 1. Define Lab service location(s) either within the clinic or external, with the Address Book 2. Check and adjust default settings related to Lab tests (Procedures) in Administration>Lists 3. Configure your Lab Test structure (See Guide on Laboratory Catalogue Configuration)	Once properly configured the Diagnostic Labs & Orders module is easy to use. Depending on the configuration, you will be able to record Lab test orders, Test Results, Additional findings, Recommendations, etc. If further configuration is required please consult the CMIS Steering Committee	**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	**Activating a client / visit** A Lab Order/Result must first have an active client and an active visit. The Lab procedure can be processed during or after the visit is closed. The visit must be closed with an admin transaction if no services or products are sold. 	 At the current Visit Page, select the **Procedure Order** option at the upper right corner menu:	
	Typical Lab Order / Test / Result continuum When a lab test is prescribed, some of the following actions usually happen: ➔	• A Lab test Order is issued to the client • Monitor Lab test, which can be performed in-house or at an external lab • An expected set of results is received and recorded – manually or digitally • Additional data, Recommendations or analysis are recorded	In OpenEMR you can (see next rows): • Place the Procedure Order • Monitor Procedure Orders • Record Lab Test results • Record additional data (eg. Recommendations or Other Findings)
2	**Placing a Procedure Order** The Procedure Order form includes the following: **Order type:** Clicking on field opens Orders page ➔ **Ordering provider:** Staff who prescribed the lab test **Date ordered:** Visit date as suggested by default **Internal time collected:** Date/time of sample collection **Priority:** High/Normal. Defined in Administration/Lists **Status:** Pending / Routed / Complete / Cancelled. Default Status when order form is created is "Pending" **Patient instructions:** free text field	 **Select** the Service Order radial button to set the correct **Order type** in the Procedure Order **Save** Procedure Order to confirm this procedure	
	Monitoring Procedure Orders You can review Procedure orders at: • Visit Page: Procedure Orders are associated to visit date • Patient Results Page: If Procedure Orders have been completed, select 'Include Completed' tick box and Refresh the screen		
3	**Recording Lab Test Results** • Make sure you have the appropriate client active Select Diagnostic Labs & Orders > Patient Results 	Patient results data entry form will show: • Date, Order Service and possible results, according to previous configuration You will • Add Report Date, Date and Time of sample collection, Specimen, Status (Final, Reviewed, Preliminary, Cancelled, Error), & • Select appropriate result(s)	 Enter data in relevant fields
4	**Recording additional data - Recommendations** • According to the previous Procedure Configuration you can enter additional data; eg: 	Results and Recommendations can be entered by selecting their Description, which is a link to a data entry page: • Status: Final, Reviewed, Preliminary, Cancelled, Error • Clinic ID: Supplier facility name • Comments: Free text box • Close Recommendation Data form and Save	
5	**Recording additional data – Other Findings** • According to the previous Procedure Configuration you can enter additional data; eg: 	Results and Other Findings can also be entered by selecting their Description, which is a link to a data entry page: • Status: Final, Reviewed, Preliminary, Cancelled, Error • Clinic ID: Supplier facility name • Comments: Free text box • Close Other Findings Data form and Save