



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Laboratory Accession GUI

(BLGU)

User Manual

Version 1.0
July 2013

Office of Information Technology (OIT)
Albuquerque, New Mexico

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Preface

This manual provides information required to understand and use the IHS Laboratory Accession for Windows component. The component is based on an easy-to-use Graphical User Interface (GUI) providing guidance to a broad range of users within IHS medical facilities.

The IHS Laboratory Accession for Windows component uses security keys to limit the user's ability to change system set-up parameters and patient information. Therefore, not all features are available to all users. Contact your Clinical Application Coordinator (CAC) to determine or change your security keys.

Rules of Behavior

All RPMS users are required to observe HHS and IHS Rules of Behavior regarding patient privacy and the security of both patient information and IHS computers and networks. This document provides RPMS Rules of Behavior.

1.0 Introduction

The task of accessioning a laboratory order has been traditionally performed by laboratory professionals using the roll and scroll RPMS laboratory menu options.

Functionality at some small I/T/U sites requires that non-laboratorians (personnel that are unfamiliar with the RPMS LIS) must log on to the RPMS Laboratory Information System (LIS) to accession laboratory orders. The accessioning process is intuitive to laboratory professionals, but is not intuitive to non-laboratorians.

Accessioning is essentially verifying that an acceptable specimen has been received, associating the specimen with a particular patient's demographics, and finally, documenting specific facts about the specimen collection:

- Confirm patient identity
- Confirm tests ordered and collection method (correct tubes or containers)
- Modifying orders if needed (add or delete tests)
- Documenting specimen type (for example: Blood, Urine, Tissue, and so on)
- Date and time of collection
- Identifying person who obtained the specimen

Once the accessioning process is completed by the RPMS LIS, an Accession Number is generated and laboratory labels are printed. The filing and processing of laboratory results are tied to this accession number.

2.0 Getting Started

Prior to accessing the Lab Accession, you must log on to the RPMS-EHR system.

Your site must have a client account number defined within the BLR MASTER CONTROL field, REF LAB CLIENT ACCOUNT NUMBER to utilize Lab Test Accession.

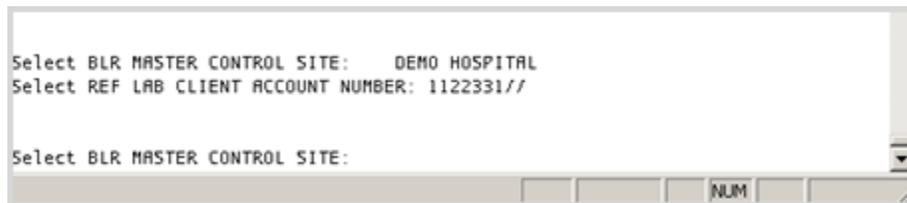


Figure 2-1: BLR Master Control File

2.1 Log On To the System

RPMS-EHR users shall:

- Have a unique User Identification/Account name and password.
- Have access based on authenticating the account name and password entered.
- Be locked out of an account after five (5) successive failed logon attempts within a specified time period (for example, one hour).

Once you have logged on to RPMS-EHR, the main window appears.

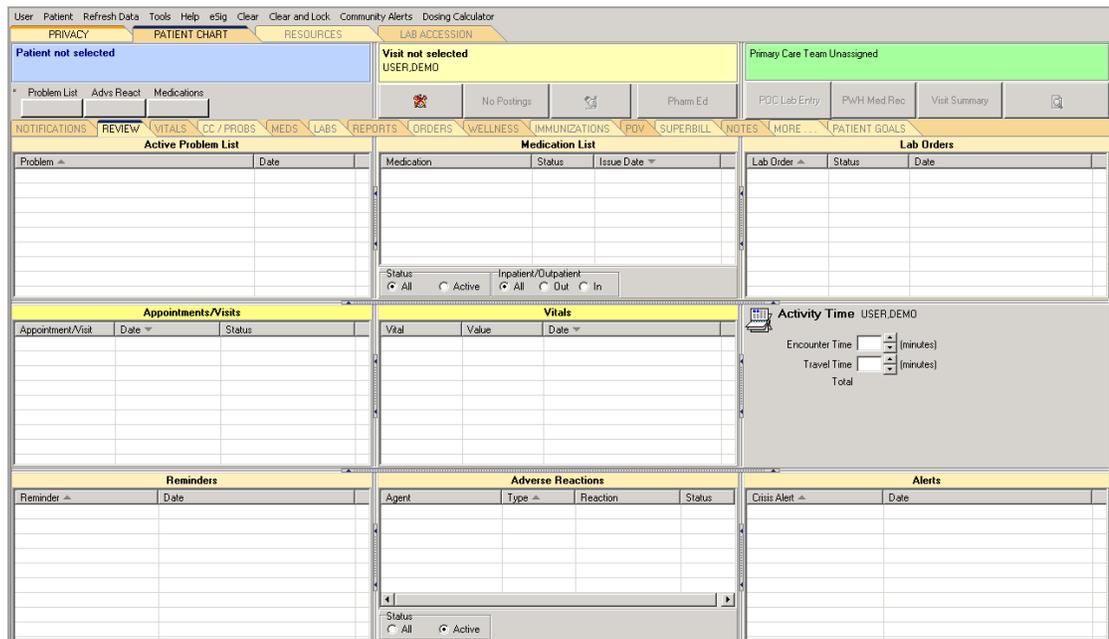


Figure 2-2: RPMS-EHR Main window

2.2 Adding the Lab Accession Component to RPMS-EHR

To use the Lab Accession component, the Clinical Application Coordinator (CAC) must first add the object to your RPMS-EHR template using Design Mode. Refer to the *Design Mode Script Guide* for additional information.

2.2.1 Security

Only users with the CIAV Design security key assigned to them by the Clinical Application Coordinator (CAC) can change the settings. Otherwise the Lab Accession tab is disabled for users without this security key.

2.2.2 Adding the Lab Accession Tab

1. Log on to RPMS-EHR.
2. In the RPMS-EHR bar at the top of the window, right-click the mouse and select **Design Mode**.

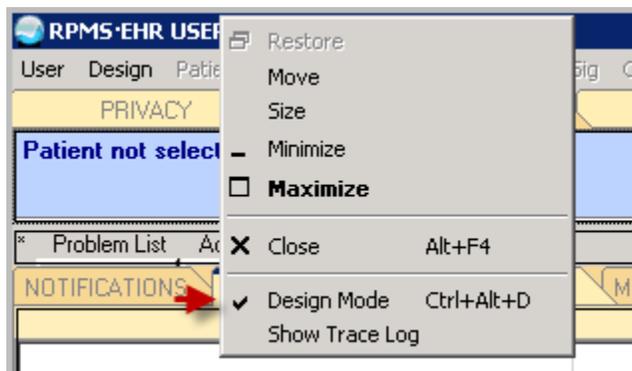


Figure 2-3: Deign Mode selected

When selected, you will notice that most of the menu options on the Main Menu bar are grayed out and cannot be selected.

3. Click **Design** in the menu bar. The Design Mode menu appears.



Figure 2-4: Design Mode Menu bar

4. Select **Layout Manager**.

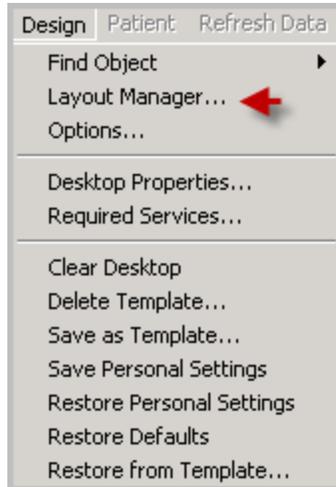


Figure 2-5: Design Mode menu

The **Layout Manager** window appears.

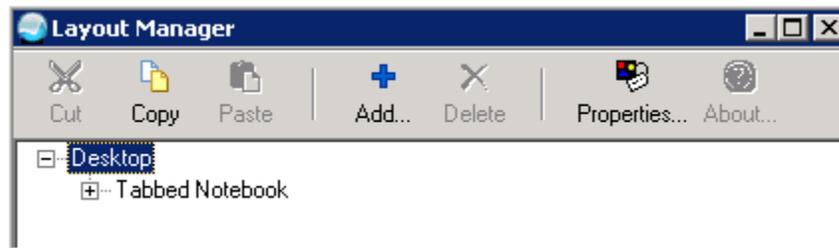


Figure 2-6: Layout Manager Window

5. Click **Tabbed Notebook** to highlight it, and then click **Properties**. The **Properties for Tabbed Notebook** window opens.

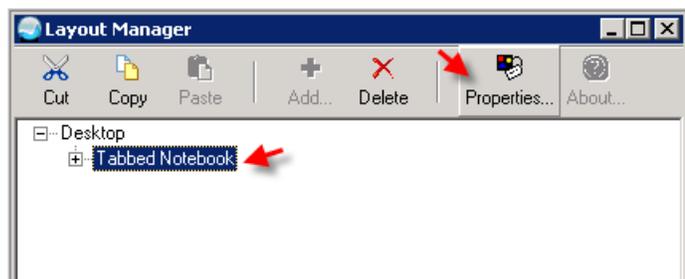


Figure 2-7: Selected Tabbed Notebook

6. On the **Properties for Tabbed Notebook** window, click **Tab Editor**. The **Tabs** section refreshes with the names of the tabs.

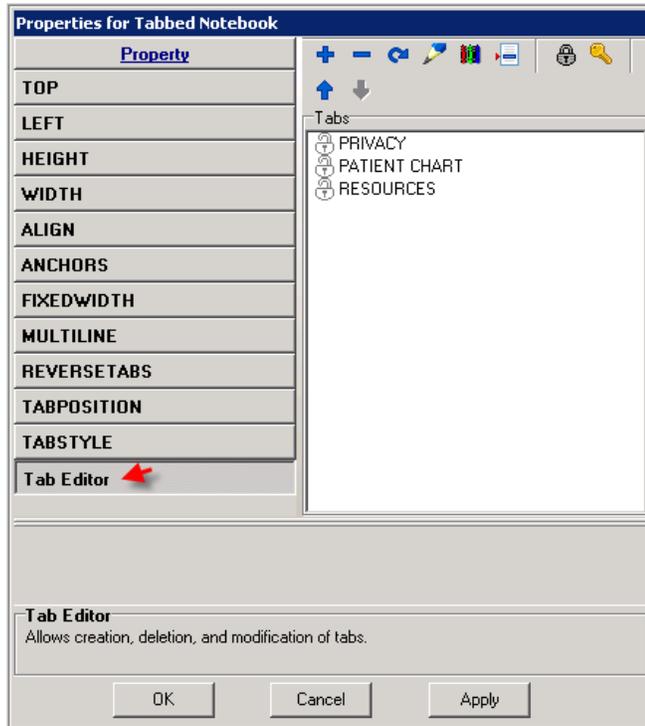


Figure 2-8: Properties for Tabbed Notebook Window

7. Click the plus sign (+) at the top of the window. A **New Tab1** appears in the list.

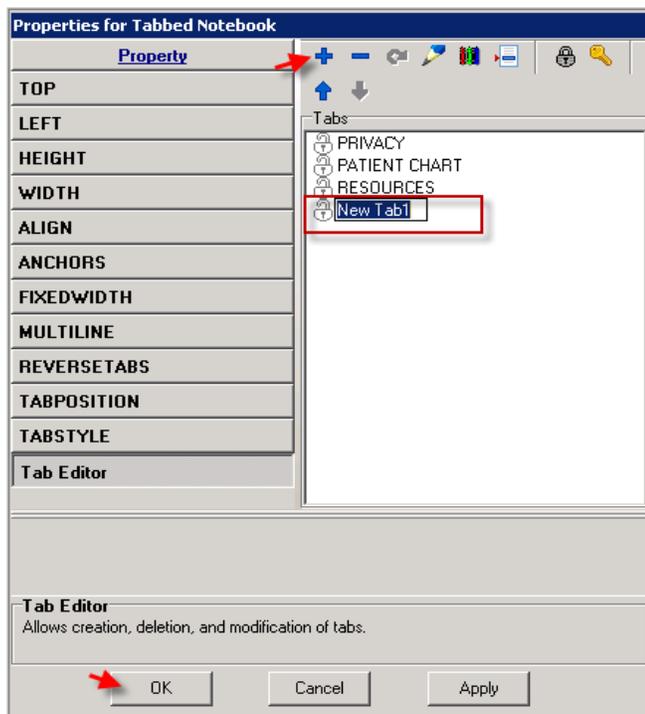


Figure 2-9: Add Lab Accession Tab

8. Select the **New Tab1** field, type **Lab Accession**, and then click **OK**. The **Layout Manager** window opens with the **Lab Accession Tab** listed in the **Tabbed Notebook** heading.
9. Select the **Lab Accession Tab**, and then click **Add** to add a new tab.

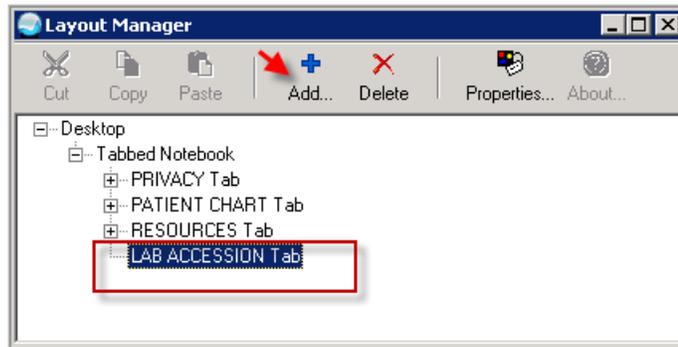


Figure 2-10: Click Add to Add the Lab Accession Tab

The **Add an Object** dialog box appears.

10. To Expand click **Type > Object** and scroll down the list of Objects that appear.

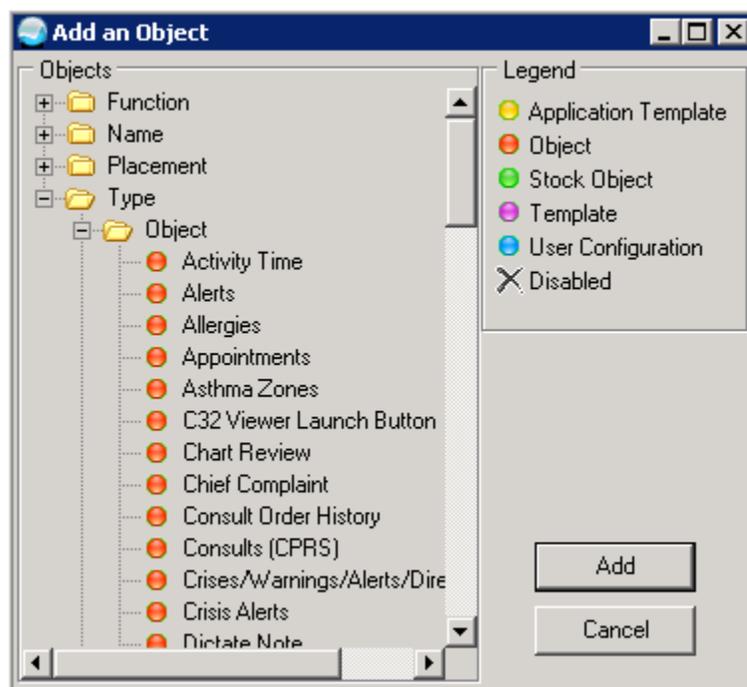


Figure 2-11: List of Objects

11. Select the **Lab Accession** object, and then click **Add**.

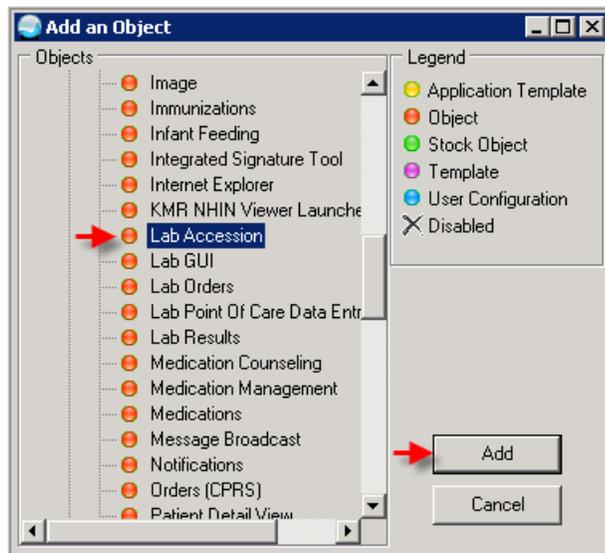


Figure 2-12: Adding Lab Accession Object

The **Lab Accession** tab is added to the list of tabs appearing on the RPMS-EHR window.

12. Click the **X** to close the **Layout Manager** window.
13. At the top of the RPMS-EHR window, click the **Design** menu and select **Save as Template**.

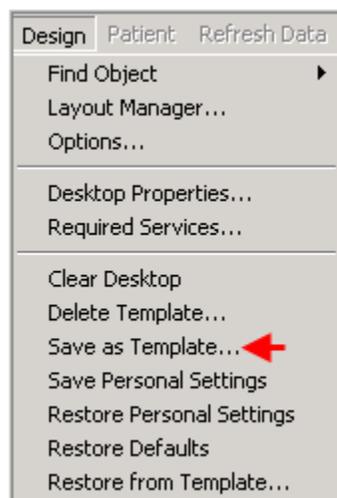


Figure 2-13: Save as Template command

14. Right-click the RPMS-EHR bar again.
15. Click **Design Mode** to cancel and exit.

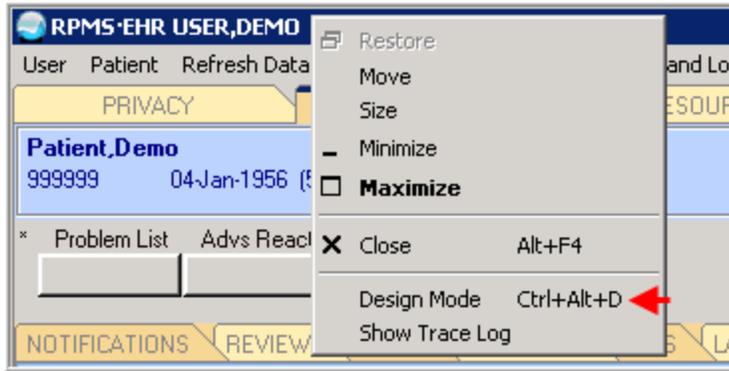


Figure 2-14: Exiting Design Mode

You are back to the normal RPMS-EHR mode.

2.3 Notifications

Notes: To set the default number of Days to Accession, the XPAR parameter BLR DAYS TO ACCESSION must be defined at installation. Refer to Settings for additional information.

The Confirmed By button is enabled only when a site sets the XPAR parameter BLR PT CONFIRM to Yes. Turning on this parameter is optional.

3.0 Orientation

The Laboratory Accession GUI workflow diagram below details how laboratory orders are processed depending on test outcomes, as well as reference laboratory configuration, LEDI vs. GIS.

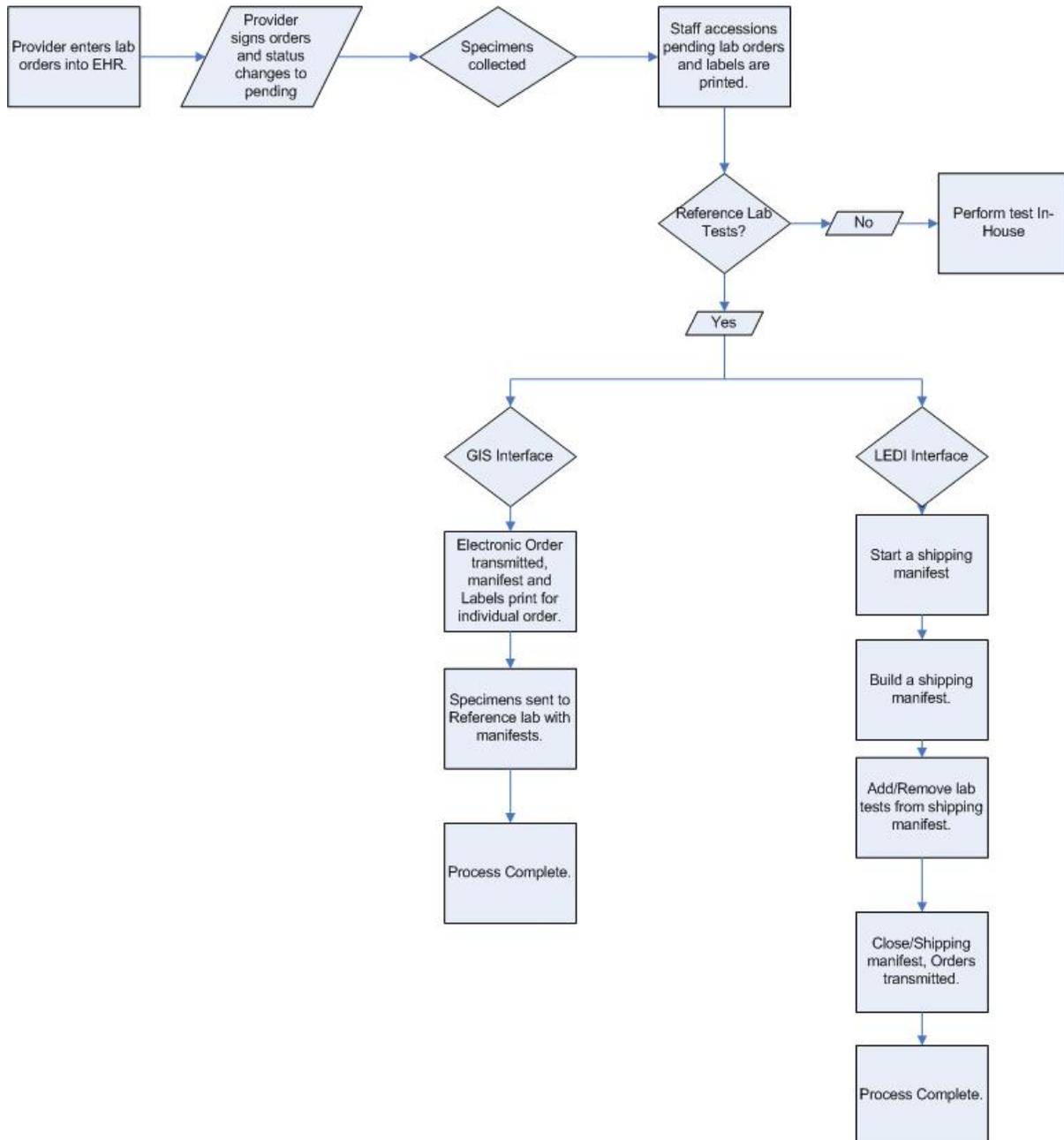


Figure 3-1: Laboratory Accession Process Workflow

3.1 Definitions

The table below defines terms used in this document for various areas of the user interface.

Table 3-1: Window Area Descriptions

Term	Description
Ribbon Bar	Organizes the functionality of the application into a single toolbar control. Contains the Tasks and Manage tabs.
Patients Pane	Shows the Patient Workspace, patient list by Collection Type, and the lab pending order patients list by Order Date. These workspaces show the groups of patients with pending lab orders that are currently waiting to be worked on, and enable the user greater flexibility on completing the tasks required for a patient.
Tasks Pane	Displays the orders associated with the patients in the Patient Workspace. Shows detail and an order summary on all pending labs for the patient.

3.2 Basic Window Layout

The main Lab Accession window contains the Ribbon bar at the top of the screen, the Patients pane on the left-side of the screen, and the Tasks pane on the right.

The Lab Accession main window is shown below:

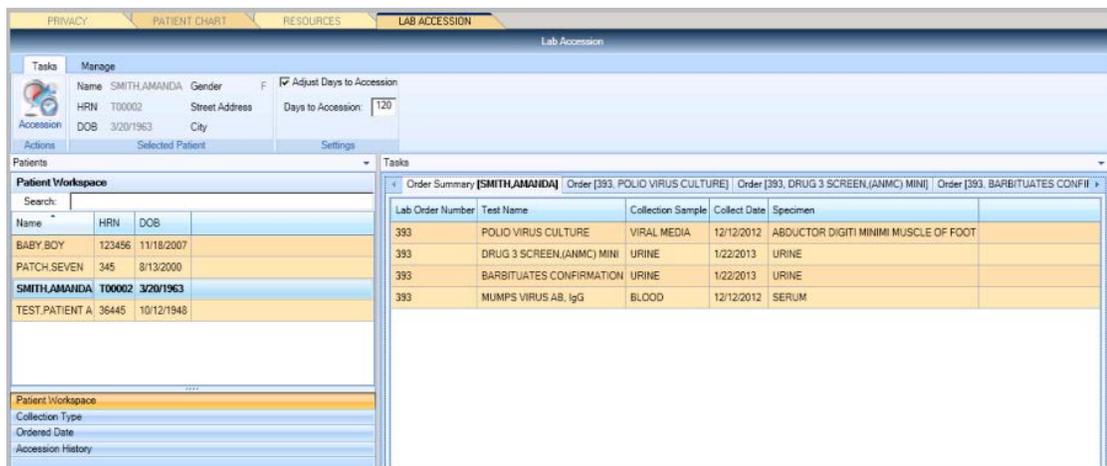


Figure 3-2: Basic Screen layout

3.3 Ribbon Bar

The Ribbon Bar at the top of the main Lab Accession window enables the user to view all functions of the program in an organized series of tabs. The Ribbon Bar is designed to resemble the traditional menu bar and toolbars of Windows applications, thereby creating a similar user experience. By separating the functionality into the following tabs, the primary operations of the application are made easily accessible with a minimum of clutter to the display:

- Tasks
- Manage



Figure 3-3: Lab Accession Ribbon bar

3.3.1 Tasks Tab

The **Tasks** tab in the Ribbon Bar provides access to the following Actions and features:

- **Accession**
- **Selected Patient**
- **Settings**

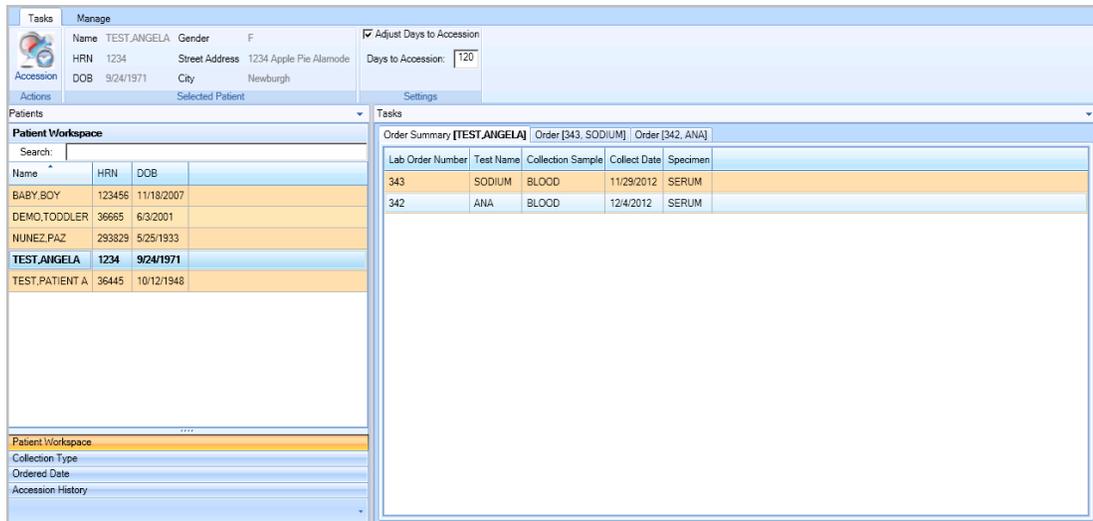


Figure 3-4: Tasks Tab with Selected Patient Order Detail

3.3.1.1 Accession

The Accession icon is used to accession tests. Refer to Section 4.1 for the steps to accession tests.

3.3.1.2 Selected Patient

The Selected Patient Detail tab in the Ribbon Bar enables the user to view the Name, HRN (health record number), DOB (date of birth), Gender, Street Address, and City details for the patient highlighted (selected) in the Patient Workspace, as shown in the example below.

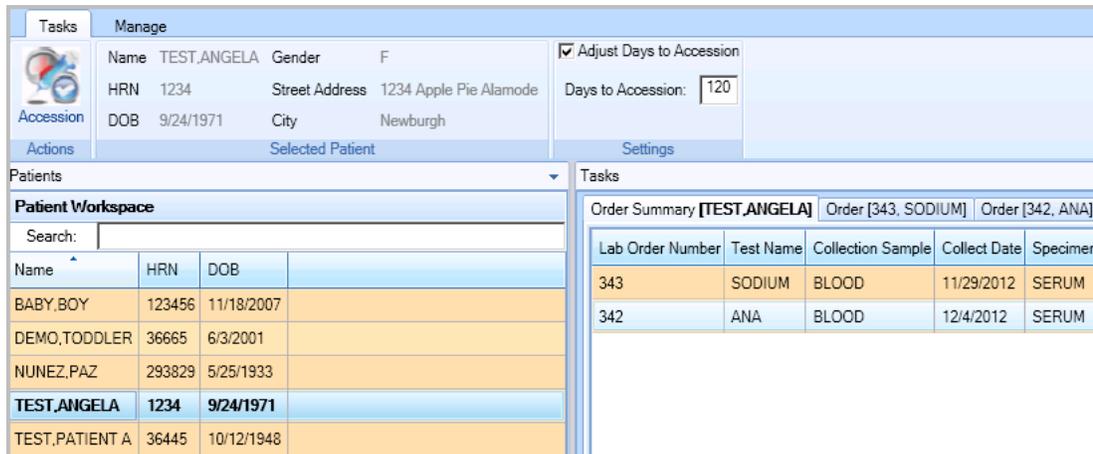


Figure 3-5: Selected Patient Information

This ensures that the user is aware of which patient record is being worked on and helps avoid altering information for the wrong patient.

The Task pane to the right of the Patient Workspace displays the Lab Order Number, Test Name, Collection Sample, Collection Date, and Specimen for the selected patient.

3.3.1.3 Settings

The Settings tab in the Ribbon Bar contains the Adjust Days to Accession setting. This enables the user to change the number of Days to Accession to narrow down the list of patients displayed in the Patient Workspace and view the orders to accession.

The number selected indicates how many days in the future, and also in the past, from today's date that the laboratory collection is scheduled.

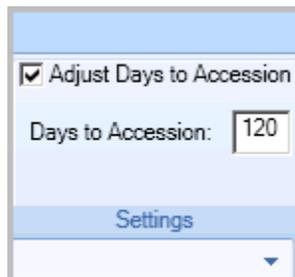


Figure 3-6: Adjust Days to Accession

When selecting Settings, make sure the **Adjust Days to Accession** option box is selected (checked). The Days to Accession number that initially displays is the number set by your Clinical Application Coordinator (CAC) at installation.

Note: To set the default number of Days to Accession, the XPAR parameter BLR DAYS TO ACCESSION must be defined at installation.

Change the number of days in the Days to Accession field, depending on how far in the future or how far back in the past that you want to view the patient's pending laboratory orders. Click **Refresh Data** in the Menu Bar at the top of the page. Patient's with accession orders in this range of days display in the **Patient Workspace**.

Note: Changing the number in the Days to Accession field is only good for the current session. Once you log off, the number reverts back to the original default set by the CAC at your site.

3.3.2 Manage Tab

The Actions available in the Manage tab enables the user to build, edit, close, print and re-print manifests, re-print accession labels, request a report view of order and test statuses, and delete tests.

The manifest icons are set up to encourage a work flow. For example, at a LEDI site, the user first builds or creates a manifest, then starts to manually add specific accessions using the Add/Remove function when a regular manifest build would add accessions that are not intended. The user would then Close/Ship and Print the manifest.



Figure 3-7: Manage Tab Example

Manage tab manifest functionality is available based on site configuration, as follows:

3.3.2.1 LEDI Sites

- Build
- Start
- Add/Remove
- Close/Ship
- Maintenance
- Re-Print Label
- Order/Test Status
- Delete

3.3.2.2 GIS Sites

- Re-Print Manifest
- Re-Print Label
- Order/Test Status

- Delete

Refer to the appropriate section for details:

- Section 3.3.3 – LEDI Site Manifest Functionality
- Section 3.3.4 – GIS Site Manifest Functionality

3.3.3 LEDI Site Manifest Functionality

3.3.3.1 Build Manifest

This function is used to add specimens onto a shipping manifest.

Refer to Section 5.1.1 for steps to build a manifest.

3.3.3.2 Start Manifest

This option enables a manifest to be started without performing a manifest build. It can be used to start a manifest and manually add specific accessions when a regular manifest build would add accessions that are not intended. An example is when a test on a specific accession or group of accessions usually performed in house needs to be sent to an outside laboratory for analysis. Use this function in conjunction with Add/Remove a Shipping Manifest Test option.

Refer to Section 5.1.2 for steps to start a manifest.

3.3.3.3 Add/Remove Manifest

The contents of an open manifest may be edited – tests added or deleted depending on what is determined as specimens are matched up with tests on the manifest.

Refer to Section 5.1.3 for steps to add or remove tests.

3.3.3.4 Close/Ship Manifest

After specimens to be shipped have been reconciled with the Shipping Manifest, the manifest may be closed and shipped. The final copy of the manifest may be given to the courier and an additional copy may be printed for laboratory reference by using the menu option, PSM Print Shipping Manifest. Selecting Close marks a shipping manifest as closed and/or shipped.

Refer to Section 5.1.4 for steps to close and ship manifests.

3.3.3.5 Manifest Maintenance

Manifest maintenance may be performed from this tab easily. Select from Open, Shipped, or Closed manifests and print or ship from this tab.

Refer to Section 5.1.5 for steps to perform manifest maintenance.

3.3.3.6 Order/Test Status

This icon provides the status for all tests given for that day and up to the grace period set by your unit. Each day is prompted in inverse order; future days can be requested. The report outputs for a specified patient, Order number, Urgency, Status, provider, and Accession number.

Refer to Section 5.1.6 for more details.

3.3.3.7 Delete

This icon is used to delete accessioned tests not yet resulted in the lab package. This feature will display a grid format of all accessioned non-resulted lab tests and enables the user to select all tests, or specific tests for deletion. A cancellation reason will be prompted.

Refer to Section 5.1.7 for steps to delete tests.

3.3.4 GIS Site Manifest Functionality

3.3.4.1 Re-Print Manifest

The Re-Print Manifest icon enables the user to re-print a shipping manifest list for laboratory specimens sent outside the facility to a reference lab in the event a shipping manifest fails to print or a copy must be made.

Refer to Section 5.2.1 for steps to re-print manifests.

3.3.4.2 Re-Print Label

The Re-Print Label icon enables the user to re-print single or multiple accession labels for that day. This feature can be used when the printer jams, for example.

Refer to Section 5.2.2 for steps to re-print labels.

3.3.4.3 Order/Test Status

This icon provides the status for all tests given for that day and up to the grace period set by your unit. Each day is prompted in inverse order; future days can be requested. The report outputs for a specified patient, Order number, Urgency, Status, provider, and Accession number.

Refer to Section 5.2.3 for more details.

3.3.4.4 Delete

This icon is used to delete accessioned tests not yet resulted in the lab package. This feature will display a grid format of all accessioned non-resulted lab tests and enables the user to select all tests, or specific tests for deletion. A cancellation reason will be prompted.

Refer to Section 5.2.4 for steps to delete tests.

3.4 Patients Pane

On the left side of the main screen is the Patients pane showing the Patient Workspace, Collection Type Workspace, Ordered Date Workspace, and Accession History Workspace. The Patient Workspace shows the list of patients that are currently being worked on and enables the user greater flexibility on completing the tasks needed for a patient.

Click the Collection Type Workspace, the Ordered Date Workspace, or the Refresh Data menu option to refresh the Patient Workspace and view those sections.

To search, begin typing the first few letters of the patient's name, HRN, or DOB in the Search field. The Patient Workspace refreshes with the patient for which you are searching at the top of the list.

Patient Workspace			
Search: <input type="text"/>			
Name	HRN	DOB	
BABY,BOY	123456	11/18/2007	
DEMO,BOY	45444	4/16/1998	
DEMO,FATHER	5465	3/5/1955	
DEMO,FEMALE A	21334	8/10/1976	
DEMO,INFANT	12	2/14/2007	
DEMO,INPATIENT F	25422	5/20/1938	
DEMO,MOTHER R	3423	9/2/1957	
DEMO,TODDLER	36665	6/3/2001	
NUNEZ,BABY	888	8/20/2008	
NUNEZ,BRANDON	6666	11/10/1990	
NUNEZ,FEMALE	999	5/5/1951	
NUNEZ,PAZ	293829	5/25/1933	
PATCH,SEVEN	345	8/13/2000	

Patient Workspace	
Collection Type	
Ordered Date	
Accession History	

Figure 3-8: Patient Workspace

3.4.1 Collection Type

Multiple labs by different order date are displayed in a single row, grouped by collection type.

Multiple lab collection types are grouped by the following collection type codes:

Code	Description
LC	Lab collects from patient.
SP	Send patient to lab.
WC	Ward collect by a nurse.
IC	Immediate collect by any available medical personnel.

Patients			
Collection Type			
Name	HRN	DOB	
^ SP			
PATIENT_DEMO	999999	1/4/1956	
DEMO,FEMALE A	21334	8/10/1976	
DEMO,FATHER	5465	3/5/1955	
DEMO,BOY	45444	4/16/1998	
DEMO,TODDLER	36665	6/3/2001	
DEMO,INFANT	12	2/14/2007	
NUNEZ,BRANDON	6666	11/10/1990	
NUNEZ,FEMALE	999	5/5/1951	
TEST,ANGELA	1234	9/24/1971	
BABY,BOY	123456	11/18/2007	
NUNEZ,PAZ	293829	5/25/1933	
PATCH,SEVEN	345	8/13/2000	
^ WC			
Patient Workspace			
Collection Type			
Ordered Date			
Accession History			

Figure 3-9: Collection Type Groupings

3.4.2 Ordered Date

Users can sort and limit the display of the list by setting a start and end date for the Order Date.

Multiple labs with different order dates are displayed on one row, based on the earliest order date and the display can be restricted by a start and end date for Order Date.

Patients				
Ordered Date				
	Name	HRN	DOB	
^ 3/28/2012				
	BABY,BOY	123456	11/18/2007	
^ 4/24/2012				
	DEMO,FEMALE A	21334	8/10/1976	
	DEMO,FEMALE A	21334	8/10/1976	
	DEMO,FEMALE A	21334	8/10/1976	
	NUNEZ,BRANDON	6666	11/10/1990	
	NUNEZ,BABY	888	8/20/2008	
	BABY,BOY	123456	11/18/2007	
^ 5/7/2012				
	PATIENT,DEMO	999999	1/4/1956	
	DEMO,FATHER	5465	3/5/1955	
	DEMO,MOTHER R	3423	9/2/1957	
	DEMO,BOY	45444	4/16/1998	
Patient Workspace				
Collection Type				
Ordered Date				
Accession History				

Figure 3-10: Ordered Date Workspace

3.4.3 Accession History

The Accession History workspace provides a history of accessioned tests for the current logged-on session.

Users can sort the display of the list by clicking the Accession Number, Test UID, or Test Name header.

The screenshot shows the 'Tasks' pane in the BLGU interface. At the top, there is a 'Manage' section for patient information: Name (TEST_ANGELA), Gender (F), HRN (1234), Street Address (1234 Apple Pie Alameda), DOB (9/24/1971), and City (Newburgh). There is also a 'Days to Accession' field set to 120. Below this is the 'Patient Workspace' table with columns for Name, HRN, and DOB. The selected patient is TEST_ANGELA with HRN 1234 and DOB 9/24/1971. To the right is the 'Tasks' table with columns for Lab Order Number, Test Name, Collection Sample, Collect Date, and Specimen. Two tasks are listed: Order [343, SODIUM] and Order [342, ANA].

Name	HRN	DOB
BABY_BOY	123456	11/18/2007
DEMO_TODDLER	36665	6/3/2001
NUNEZ_PAZ	293929	5/25/1933
TEST_ANGELA	1234	9/24/1971
TEST_PATIENT_A	36445	10/12/1948

Lab Order Number	Test Name	Collection Sample	Collect Date	Specimen
343	SODIUM	BLOOD	11/29/2012	SERUM
342	ANA	BLOOD	12/4/2012	SERUM

Figure 3-12: Tasks Pane with Patient Selected

3.6 Refreshing the Patient Workspace

The Patient Workspace is set to auto-refresh to update with new orders every 10 minutes, or whenever the user clicks from tab to tab.

The user can also click the **Refresh Data** button at the top of the RPMS EHR bar.



Figure 3-13: Refresh Data Button

3.7 Pane Size Adjustment

The size of the panes can be adjusted as with other Windows-type applications.

1. Roll your cursor over the edge of the window to enable the double-pointed arrow cursor.
2. Click, and while holding down your mouse button, drag the window to the desired size.

For example, the Tasks pane can be pulled down and lengthened to show all of the available fields without having to scroll down.

4.0 Completing Accession Tasks

4.1 Accessioning Orders

Complete the steps below to generate an accession number and print laboratory labels.

If multiple lab tests have the same collection sample, and only one test is selected for accessioning, the system will accession all tests that are associated and remove them from the list of patient tests yet to be accessioned (will also show in accession history pane). For example, if the patient has a UA and HCG test to be accessioned, and the user only selects the UA, the HCG will also be accessioned because the collection sample is the same.

Note: When printing labels during the accessioning process, the printer device must be defined from the **ACCESSION PRINTER** field of the **PRINTER DIVISION** multiple in the **LABORATORY SITE** file. This printer must be also defined in the **LABEL DEVICE** multiple, also located in the **LABORATORY SITE** file.



Figure 4-1: Accession Printer Defined

To accession orders:

1. In the **Patient Workspace**, click to select the patient's name. The patient's orders appear in the **Order Summary** tab of the **Tasks** pane.

Note: If any of the patient's sendout tests have an Ask at Order Question (AOE) defined in the BLR Reference Lab file, you will see [AOE] next to the Test Name. See step 4 for details.

Lab Order Number	Test Name	Collection Sample	Collect Date	Specimen
449	LIPID PROFILE DEMO	BLOOD	5/29/2013	SERUM
449	xPAP LB,RFX HPV ASCU [AOE]	THIN PREP	5/29/2013	ENDOCERVIX
451	xLEAD(PEDI) [AOE]	BLOOD	5/30/2013	BLOOD
450	POTASSIUM	BLOOD	6/10/2013	SERUM

Figure 4-2: Order Summary before Accessioning

2. From the Ribbon Bar in the **Tasks** tab, click the **Accession** button.

Tasks		Manage	
 Accession	Name	SMITH,ARMINA	Gender F
	HRN	T00002	Street Address
	DOB	3/20/1963	City
<input checked="" type="checkbox"/> Adjust Days to Accession		Days to Accession: 120	
Actions		Selected Patient	
		Settings	

Figure 4-3: Accession Button

The **Accession** [patient name] tab opens in the **Tasks** pane.

Order	Test Name	Collection Sample	Collect Date	Specimen	Diagnosis	Lab Process
<input type="checkbox"/>	393 POLIO VIRUS CULTURE	VIRAL MEDIA	12/12/2012	ABDUCTOR DIGITI MINIMI MUSCLE OF FOOT		
<input type="checkbox"/>	393 DRUG 3 SCREEN,(ANMC) MINI	URINE	1/22/2013	URINE		
<input type="checkbox"/>	393 BARBITUATES CONFIRMATION	URINE	1/22/2013	URINE		
<input type="checkbox"/>	393 MUMPS VIRUS AB, IgG	BLOOD	12/12/2012	SERUM		

Account Number
<input checked="" type="radio"/> 91901619
<input type="radio"/> ABC

Figure 4-4: Accession Pane before Accessioning

3. In the **Accession** pane:

- a. The **Confirmed By** button defaults to the logged-on user. If you want to select a different user:

Note: The **Confirmed By** button is enabled only when a site sets the XPAR parameter **BLR PT CONFIRM** to **Yes**.
Turning on this parameter is optional.

- i. Click the **Confirmed By** button. The **Select a User** window opens.

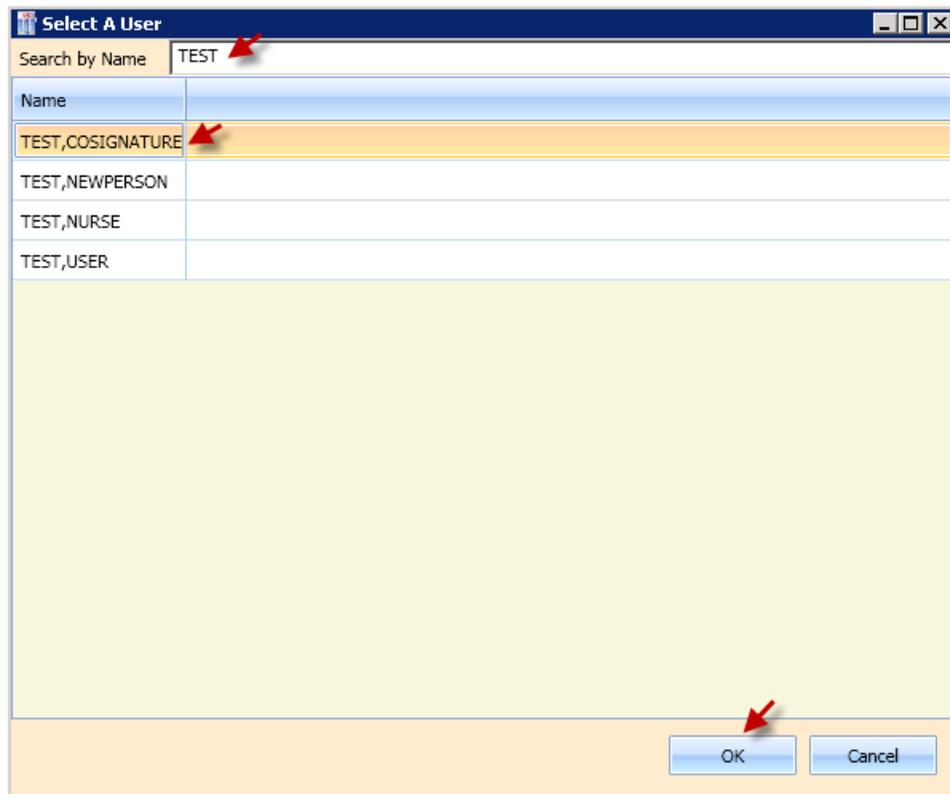


Figure 4-5: Selecting a Different User

- ii. In **Search by Name**, begin typing the first few letters of the patient's name. The list refreshes with the names matching showing at the top.
 - iii. Click to select the name, and then click **OK**. The **Confirmed By** button shows the user's name which you selected.
- b. In **the Confirmation** field, type in the information from the patient for identification, usually the patient's HRN, name, or date-of-birth (DOB).
 - c. The **Collected By** button defaults to the logged in user. If you want to select a different user:
 - i. Click the **Collected By** button. The **Select a User** window opens.

- ii. In **Search by Name**, begin typing the first few letters of the patient's name. The list refreshes with the name(s) matching the letters you typed showing at the top.
- iii. Click to select the name, and then click **OK**. The **Collected by** button shows the user's name which you selected.

Note: The Confirmed By and Collected By can be different users, as applicable.

- d. The **When Collected** field defaults to the current date and time. If you need to select a different date and/or time:
 - i. Type the new date and/or time, or click the calendar icon (📅). The Calendar and Clock window opens.

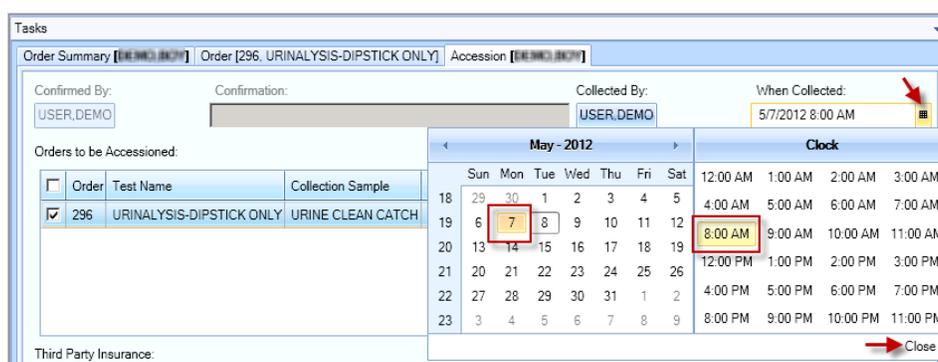


Figure 4-6: Select New Date and/or Time

- ii. Click to select the applicable date and/or time, and then click **Close**. The When Collected: field updates with your changes.

Note: You cannot utilize N for Now or T for Time.

- e. In the **Orders to be Accessioned** section, click the box next to **Order** to select all, or click the boxes next to the order(s) you want to accession.
- f. Insurance Selection: The insurance choice defaults to the setting in the BLR Master Control file, Ref lab Billing Type field.
- g. The insurance setting can be changed from the default if the patient has Third Party insurance.

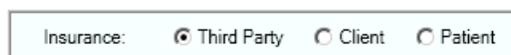


Figure 4-7: Insurance Option Buttons

- If the patient has insurance, the **Accession** tab lists all insurance entries for the patient in the Third Party Insurance section.

Tasks

Jer [393, DRUG 3 SCREEN (ANMC) MINI] | Order [393, BARBITUATES CONFIRMATION] | Order [393, MUMPS VIRUS AB, IgG] | Accession [393, DRUG 3 SCREEN (ANMC) MINI]

Confirmed By: USER.DEMO | Confirmation: | Collected By: TEST.NURSE | When Collected: 2/14/2013 11:00 AM

Orders to be Accessioned: Insurance: Third Party Client Patient

<input type="checkbox"/>	Order	Test Name	Collection Sample	Collect Date	Specimen	Diagnosis	Lab Process
<input type="checkbox"/>	393	POLIO VIRUS CULTURE	VIRAL MEDIA	12/12/2012	ABDUCTOR DIGITI MINIMI MUSCLE OF FOOT		
<input type="checkbox"/>	393	DRUG 3 SCREEN (ANMC) MINI	URINE	1/22/2013	URINE		
<input type="checkbox"/>	393	BARBITUATES CONFIRMATION	URINE	1/22/2013	URINE		
<input type="checkbox"/>	393	MUMPS VIRUS AB, IgG	BLOOD	12/12/2012	SERUM		

Client Accounts:

Account Number
<input checked="" type="radio"/> 91901619
<input type="radio"/> ABC

OK Cancel

Figure 4-8: Accessioning Patient with Third Party Insurance (Adding Diagnosis)

- If the patient has Third Party Insurance, click the **Diagnosis** button in the line item(s) you are accessioning. The **Select Diagnoses** window opens.

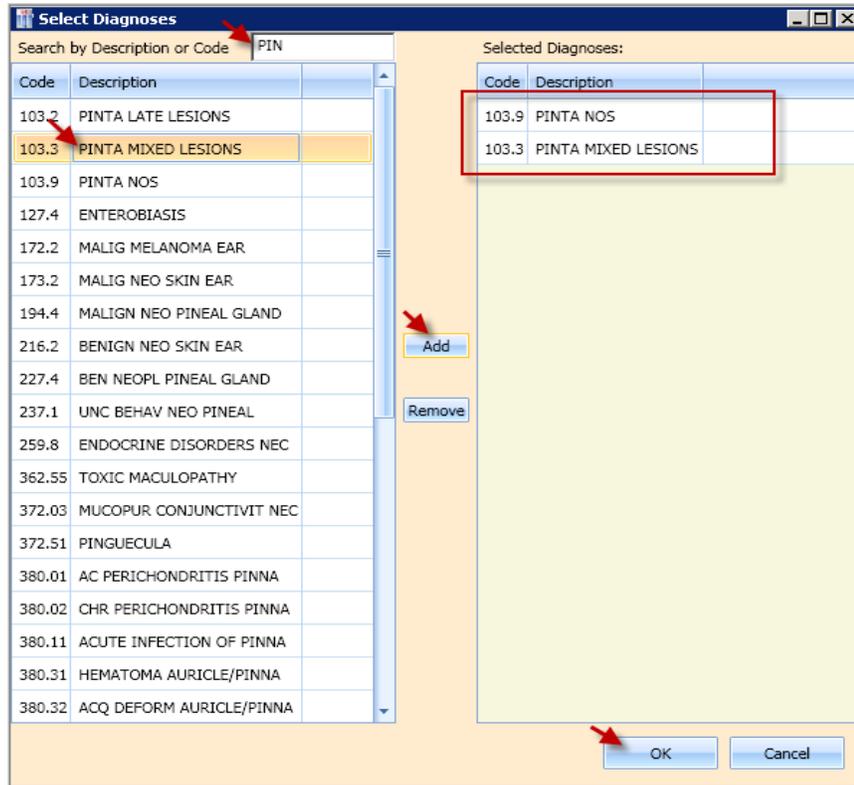


Figure 4-9: Select Diagnoses

- ii. In the **Search by Description or Code** field, begin typing the first few letters of the diagnosis, or the ICD code. The list refreshes with the applicable diagnoses.

Note: You can sort the list of diagnoses by clicking the Code or Description header.

- iii. Click to select the applicable diagnosis, and then click the **Add** button. The diagnosis shows in the **Selected Diagnoses** column. Do this as many times as needed to apply the necessary diagnoses.
- iv. Click **OK**. The diagnosis code appears in the **Diagnosis** column in the line item(s) to be accessioned.

Note: Multiple Diagnoses entries are allowed and permeate to all orders selected for accession.

- v. In **Third Party Insurance**, click the checkbox to select the Insurance Name for the company to be billed.
- vi. In **Client Accounts**, click the **Account Number** option button next to the **Account Number** to be billed.

- If the BLR Master Control file is set to Client, the Client option button is auto-selected.
- The Diagnosis field(s) are disabled.

Order	Test Name	Collection Sample	Collect Date	Specimen	Diagnosis	Lab Process
<input type="checkbox"/>	393 POLIO VIRUS CULTURE	VIRAL MEDIA	12/12/2012	ABDUCTOR DIGITI MINIMI MUSCLE OF FOOT		
<input type="checkbox"/>	393 DRUG 3 SCREEN (ANMC) MINI	URINE	1/22/2013	URINE		
<input type="checkbox"/>	393 BARBITUATES CONFIRMATION	URINE	1/22/2013	URINE		
<input type="checkbox"/>	393 MUMPS VIRUS AB, IgG	BLOOD	12/12/2012	SERUM		

Figure 4-10: Client Insurance Button Accession Screen Example

- The system displays all Client Accounts defined in the BLR Master Control file; select one or multiple account numbers, as needed.
- If the BLR Master Control field REF LAB CLIENT ACCOUNT NUMBER has more than one entry, the Accession pane displays the Client Accounts pane.
- If the BLR Master Control field REF LAB CLIENT ACCOUNT NUMBER has one entry, the Accession pane DOES NOT display client account number pane.
- If the patient has no insurance, the Patient button is auto-selected.
- The Diagnosis field(s) are disabled.

Tasks

Order [393, DRUG 3 SCREEN.(ANMC) MINI] | Order [393, BARBITUATES CONFIRMATION] | Order [393, MUMPS VIRUS AB, IgG] | Accession [PATIENT, ABC]

Confirmed By: USER, DEMO Confirmation: Collected By: TEST, NURSE When Collected: 2/14/2013 11:00 AM

Orders to be Accessioned: Insurance: Third Party Client Patient

<input type="checkbox"/>	Order	Test Name	Collection Sample	Collect Date	Specimen	Diagnosis	Lab Processing Instruction
<input type="checkbox"/>	393	POLIO VIRUS CULTURE	VIRAL MEDIA	12/12/2012	ABDUCTOR DIGITI MINIMI MUSC		
<input type="checkbox"/>	393	DRUG 3 SCREEN.(ANMC) MINI	URINE	1/22/2013	URINE		
<input type="checkbox"/>	393	BARBITUATES CONFIRMATION	URINE	1/22/2013	URINE		
<input type="checkbox"/>	393	MUMPS VIRUS AB, IgG	BLOOD	12/12/2012	SERUM		

Client Accounts:

<input type="checkbox"/>	Account Number	
<input checked="" type="checkbox"/>	91901619	
<input type="checkbox"/>	ABC	

OK Cancel

Figure 4-11: Patient Insurance Button Accession Screen Example

- The system displays all Client Accounts defined in the BLR Master Control file; select one or multiple account numbers, as needed.
 - If the BLR Master Control field REF LAB CLIENT ACCOUNT NUMBER has more than one entry, the Accession pane displays the Client Accounts pane.
 - If the BLR Master Control field REF LAB CLIENT ACCOUNT NUMBER has one entry, the Accession pane DOES NOT display client account number pane.
 - If you need to change the auto-selected option, click the applicable option button to indicate which party is responsible for billing.
4. Click **OK** on the Accession pane. If any of the patient's sendout tests have an Ask at Order Question (AOE) defined in the BLR Reference Lab file, you will see [AOE] next to the Test Name, and the **Accession** [Patient Name] AOE dialog box opens.

Tasks

Order Summary [] | Order [386. xPAP LB,RFX HPV ASCU [AOE]] | Order [386. xLEAD(PED)] [AOE]] | Accession []

Question 1 of 34: xPAP LB,RFX HPV ASCU

Question:

Specimen collected with broom alone? (Y/N)

Answer:

Bypass Next

Figure 4-12: Accession [Patient Name] AOE Dialog Box Example

5. In the **Accession** [Patient Name] AOE dialog box:
 - a. In Question 1 of X, in the Answer field, type an answer to the question or leave the field blank, and then click **Next**. You are taken to the next question (if applicable).

Note: The Question field in the AOE Questions dialog box is read-only. The Answer field is free-text and has an 80 character limit. No validation or range checking of the Answer field occurs by the system.

- If there are no additional questions associated with the order, you are taken to the Accession screen with a table showing your questions and answers.

Label	Question	Answer
Question 1 of 5: xLEAD(PEDI)	Race?(1=White,2=Black,3=Indian,4=Asian,5=Other)	1
Question 2 of 5: xLEAD(PEDI)	Hispanic (1=Yes,2=No,9=Unknown)	2
Question 3 of 5: xLEAD(PEDI)	Type? (U=Urine,V=Venous,F=Fingerstick)	U
Question 4 of 5: xLEAD(PEDI)	Purpose? (I=Initial,R=Repeat,F=Follow-up)	I
Question 5 of 5: xLEAD(PEDI)	County Code? (2 Digit County Code)	10

Figure 4-13: Accession Question and Answer Screen

- If you leave the **Answer** field blank and click **Bypass**, all other (if any) questions are voided and you are taken to the **Accession** screen which shows the bypassed questions with blanks in the **Answer** column.

Note: You may change your answers on questions that were bypassed or questions that were previously answered by clicking within the line item in the Answer column and typing the new answer.

- On the final question, type an answer or leave it blank, and then click **OK**. The **Accession** screen opens. If you click the **Bypass** button on the last question, the question becomes voided and you are returned to the **Accession** screen.

Figure 4-14: AOE Final Question Example

6. On the **Accession** question and answer screen, review your answers in the **Answer** column, and then click **OK**.

The patient's name is removed from the Patient Workspace. Lab labels and manifest will print.

4.2 Using the Patient Workspace (Searching for Patients)

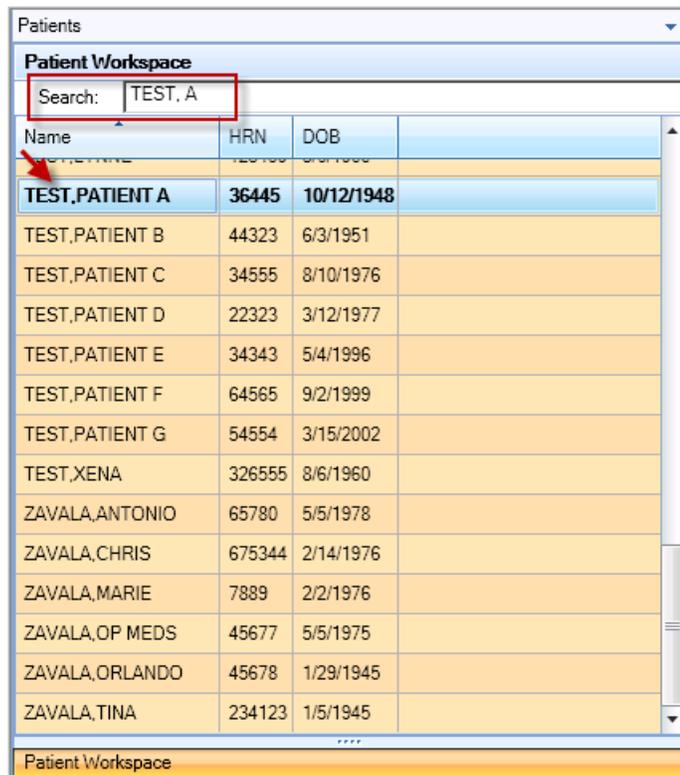
Regardless of how many collection types or pending orders, the system displays only one row per patient in the Patient Workspace.

Click to select the patient in the **Patient Workspace** to view all pending Orders and an Order Summary.

You can search for patients from the main list by Name, HRN, or DOB.

To search from the main list:

1. In the **Search** field at the top of the **Patient Workspace**, begin typing the first few letters of the patient's name. The list refreshes with the name(s) matching the letters you typed showing at the top.



Name	HRN	DOB
TEST,PATIENT A	36445	10/12/1948
TEST,PATIENT B	44323	6/3/1951
TEST,PATIENT C	34555	8/10/1976
TEST,PATIENT D	22323	3/12/1977
TEST,PATIENT E	34343	5/4/1996
TEST,PATIENT F	64565	9/2/1999
TEST,PATIENT G	54554	3/15/2002
TEST,XENA	326555	8/6/1960
ZAVALA,ANTONIO	65780	5/5/1978
ZAVALA,CHRIS	675344	2/14/1976
ZAVALA,MARIE	7889	2/2/1976
ZAVALA,OP MEDS	45677	5/5/1975
ZAVALA,ORLANDO	45678	1/29/1945
ZAVALA,TINA	234123	1/5/1945

Figure 4-15: Search by Patient Name in Patient Workspace

2. To search by HRN or DOB, begin typing the first few digits of the patient's HRN or DOB. The list refreshes with the name(s) of the patients matching the HRN or DOB at the top.

Patients

Patient Workspace

Search: 1234

Name	HRN	DOB
TEST,LYNNE	123459	8/6/1960
TEST,PATIENT A	36445	10/12/1948
TEST,PATIENT B	44323	6/3/1951
TEST,PATIENT C	34555	8/10/1976
TEST,PATIENT D	22323	3/12/1977
TEST,PATIENT E	34343	5/4/1996
TEST,PATIENT F	64565	9/2/1999
TEST,PATIENT G	54554	3/15/2002
TEST,XENA	326555	8/6/1960
ZAVALA,ANTONIO	65780	5/5/1978
ZAVALA,CHRIS	675344	2/14/1976
ZAVALA,MARIE	7889	2/2/1976
ZAVALA,OP MEDS	45677	5/5/1975
ZAVALA,ORLANDO	45678	1/29/1945
ZAVALA,TINA	224123	1/5/1945

Patient Workspace

Figure 4-16: Search by HRN in Patient Workspace

4.3 Using the Ordered Date Workspace Functions

In the Ordered Date workspace, pending lab order requests are grouped by the date they were ordered by default when the Ordered Date workspace is opened.

To sort and view pending lab order requests by patient Name, HRN, or DOB, refer to the steps in Section the [Using the Collection Type Workspace Functions](#) section.

5.0 Manifest Functions (Using the Manage Tab)

The following sections provide Manage tab manifest functionality based on site configuration (LEDI and GIS).

5.1 LEDI Manifest Functions

The following manifest functionality (from the Manage tab) is only available at LEDI configured sites.

5.1.1 Building Manifests

Use this function to add specimens onto a shipping manifest. Refer to Section 3.3.3.1 in the Orientation section for details.

Note: If you create a manifest using the Build manifest function, Start Manifest function (Section 3.3.3.2) will be disabled.

To build a manifest:

1. In the Ribbon Bar, click the **Manage** tab. The **Actions** section opens.
2. Click the **Build** icon.



Figure 5-1: Build icon

- If a manifest is already open, click to select it.
- If no manifest is open yet, you will be prompted to open one. Click **Yes**.

The **Build Manifest** tab opens in the **Tasks** pane.

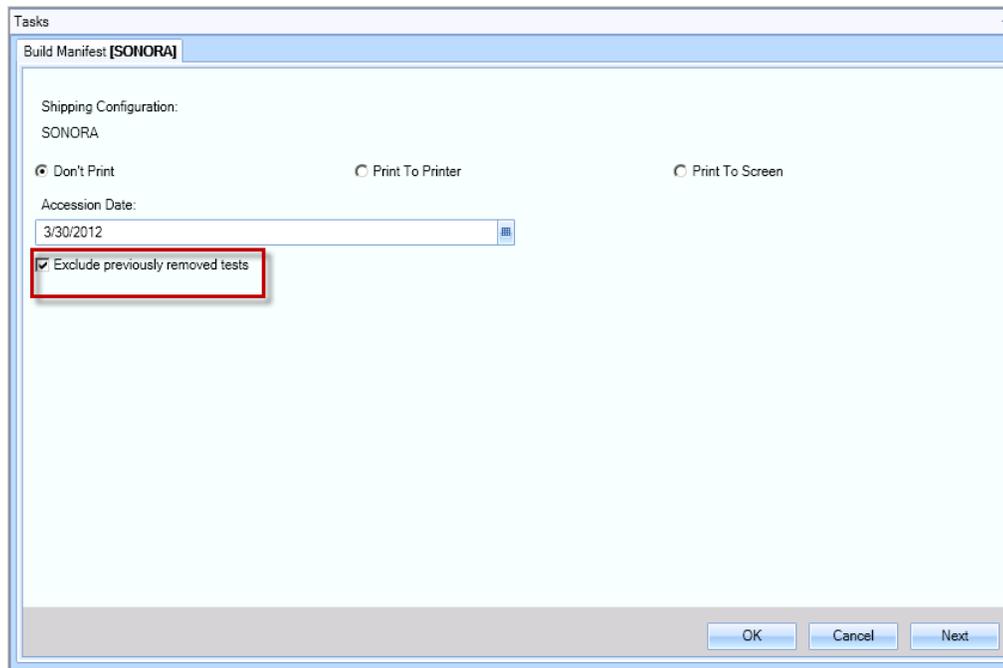


Figure 5-2: Build Manifest Window

3. In the **Shipping Configuration** section, select the applicable option button:
 - **Don't Print** (default)
 - **Print to Printer**
 - **Print to Screen**
4. In **Accession Date**, the date defaults to the current date. If needed, type a different date of accession, or click the calendar icon (📅) to select a date.

Note: If you opt to select a specific accession date (not the default date), you will be prompted to provide a specific accession date and starting and ending accession numbers for each accession area.

5. Click to select the **Exclude previously removed tests** (those that were previously added to a manifest and then removed using the Add/Remove function) checkbox if you need to exclude previously removed tests.

Note: You can add the excluded tests to the next manifest by not checking the Exclude previously removed tests checkbox.

6. Click one of the following on the **Build Manifest** tab, as applicable:
 - Click **OK** to build a manifest with all tests. The **Build Manifest** tab closes.
 - Click **Next** to select individual tests to add or remove from the manifest. The **Add/Remove Tests** tab opens.
 - Click to select the tests to be added or removed from the manifest, and then click **OK**.
7. If you selected the **Print to Printer**, or **Print to Screen** options, an example of the manifest will open and you will be prompted to print. Click **Yes**.

5.1.2 Starting Manifests

Use this function to start a manifest at the beginning of the day and keep it open all day until it is reviewed, closed, and shipped when the courier picks up specimens.

Refer to Section 3.3.3.2 in the Orientation section for details.

Note: If you have created a manifest using the Build manifest function, the Start manifest function is disabled.

To start a manifest:

1. In the Ribbon Bar, click the **Manage** tab. The **Actions** section opens.
2. Click the **Start** icon.



Figure 5-3: Start Manifest icon

3. A **Start new Manifest** pop-up asks if you want to start a new manifest. Click **Yes**.



Figure 5-4: Start New Manifest Confirmation Pop-Up

A shipping manifest is opened and a Manifest Invoice number appears in the **Manifest Workspace**.

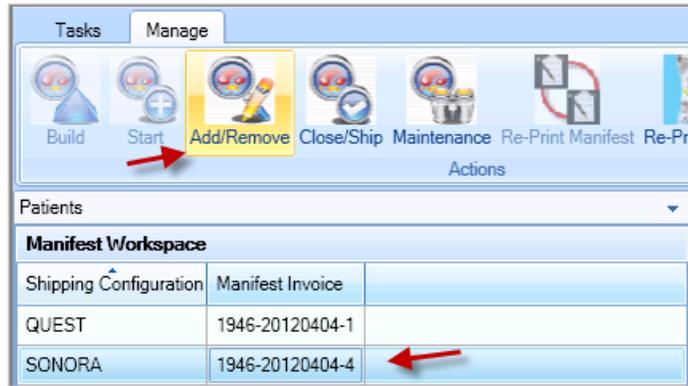


Figure 5-5: Start Invoice and Add Tests

- In the **Manifest Workspace**, click to select the invoice, and then click the **Add/Remove** button to add (or remove) tests from the invoice following the steps in the next section, below.

5.1.3 Adding or Removing Accessions To or From Manifests

Use this function to add or remove tests from an open shipping manifest.

Refer to Section 5.1.3 in the Orientation section for details.

Notes: Only tests that are built in the shipping configuration file can be added to a manifest. Therefore, only accessions with those tests are displayed and can be selected.

Each test that will be sent to the interfaced reference laboratory must have an entry under the profile SENDOUTS.

To add or remove manifests:

- In the Ribbon Bar, click the **Manage** tab. The **Actions** section opens.
- In the **Manifest Workspace**, click to select a manifest.

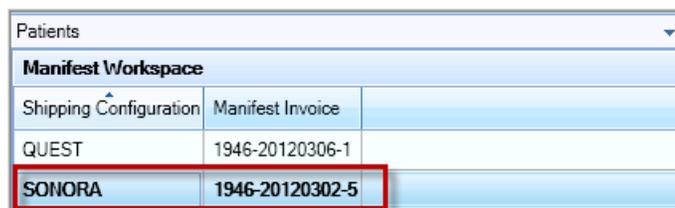


Figure 5-6: Select a Manifest to Add/Remove Accessions

- Click the **Add/Remove** icon. The **Add/Remove Tests** tab opens in the **Tasks** pane.



Figure 5-7: Add/Remove Manifest icon

- Click the checkbox next to **Test UID** to select all tests.
- Click the individual test to select it.
- Click the checkbox next to the patient's name to select all of that patient's tests.

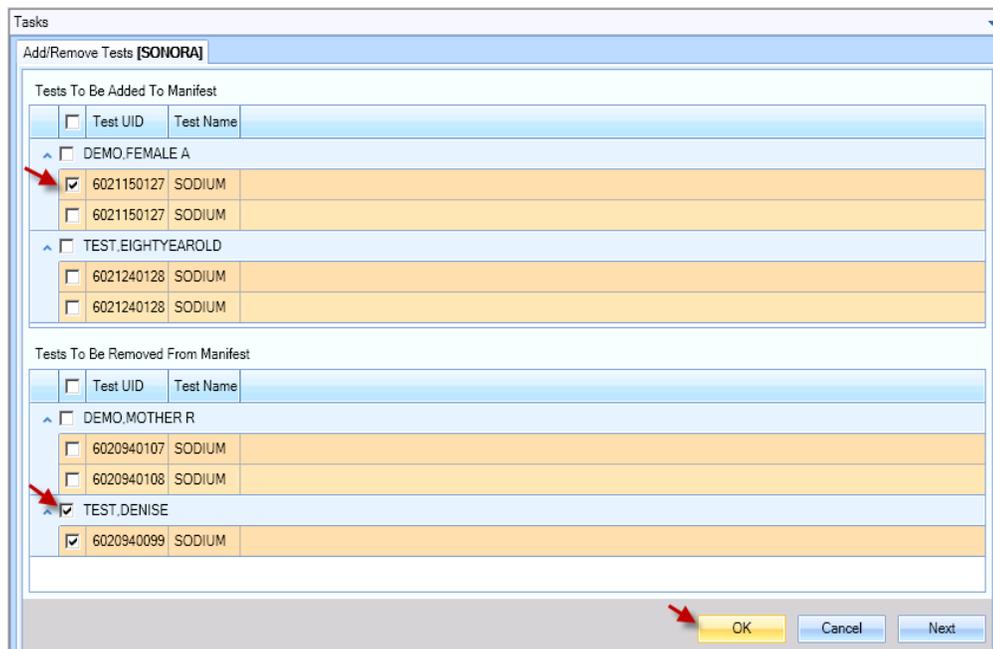


Figure 5-8: Click to Select Tests to Add (or Remove) to/from Manifest

- Click **OK**.
- If removing tests, you will see a **Remove Selected Test(s)** confirmation. Click **OK** to remove the tests.

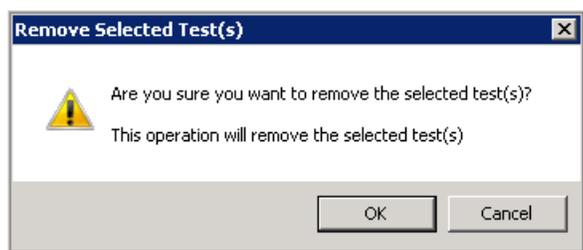


Figure 5-9: Remove Selected Test(s) Confirmation

5.1.4 Closing and Shipping Manifests

Use this function to close and ship manifests after reconciling.

Refer to Section 3.3.3.4 in the Orientation section for details.

To close and ship manifests:

1. In the Ribbon Bar, click the **Manage** tab. The **Actions** section opens.
2. In the **Manifest Workspace**, click to select a **Manifest Invoice** to close and ship.
3. Click the **Close/Ship** icon.



Figure 5-10: Close/Ship Manifests icon

The **Close/Ship Manifest** [manifest name] tab opens with the shipping manifest and list of tests.

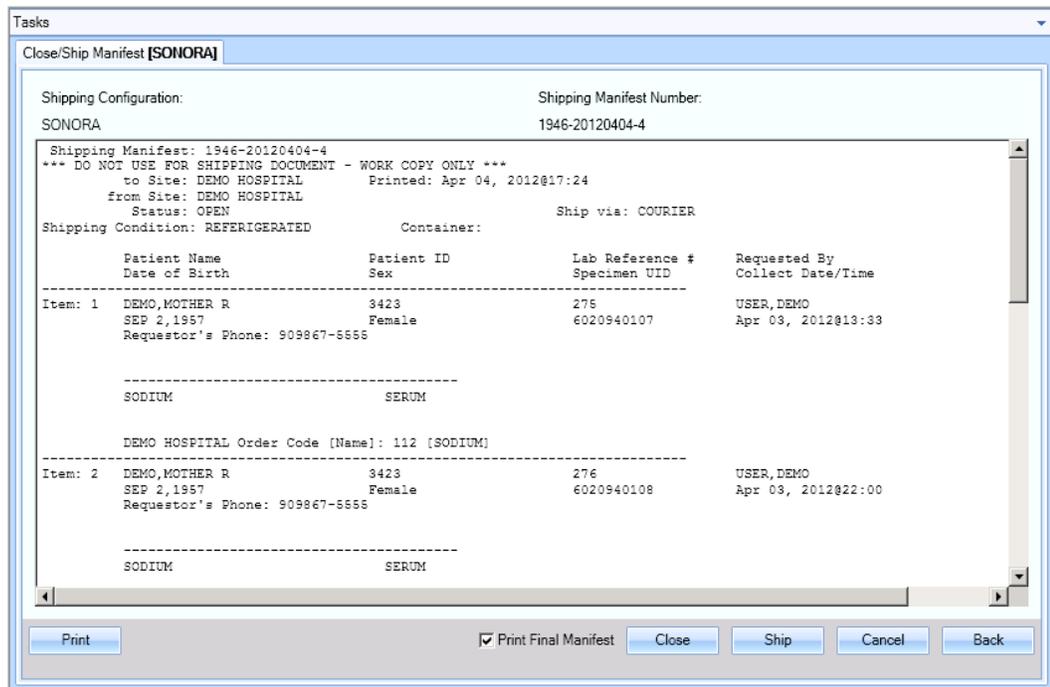


Figure 5-11: Close/Ship Manifest Tab

4. Click the following, as applicable:

- Click **Print** to print the manifest (without closing or shipping).

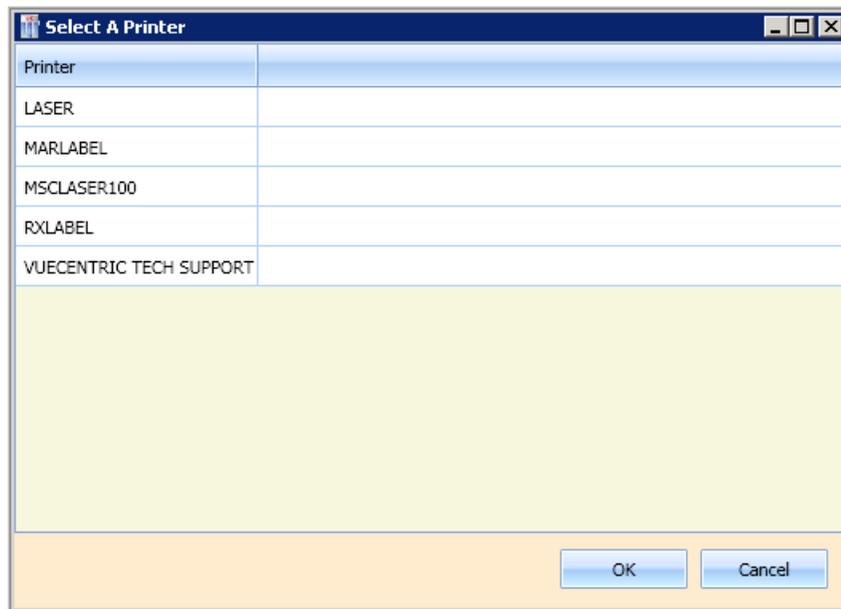


Figure 5-12: Select a Printer for Manifest Print

- Click to select a printer.

- b. Click **OK**. The manifest prints at your selected printer.
- Click the **Print Final Manifest** check-box to print the manifest at Close/Ship. You will be prompted to select a printer.
- Click **Close** to close the final manifest. The **Close/Ship Manifest** tab closes and the Manifest is closed in the **Manifest Workspace**.
- Click **Ship** to ship the final manifest.
- Click **Cancel** to cancel the Close/Ship.
- Click **Back** to return to the **Add/Remove Tests** tab. Add or remove tests as needed, and then:
 - Click Next to return to the Close/Ship Manifest tab.
 - Click Ok to save the added or removed tests on the manifest.

5.1.5 Maintenance

Refer to Section 3.3.3.5 in the Orientation section for details.

For maintenance of manifests:

1. In the Ribbon Bar, click the **Manage** tab. The **Actions** section opens.
2. Click the **Maintenance** icon.



Figure 5-13: Maintenance icon

The **Manifest Maintenance** tab opens in the Tasks pane, containing a list of the following manifest statuses and the applicable manifests:

- **Open**
- **Shipped**
- **Closed**

	Invoice	Status Date
^ OPEN		
<input type="radio"/>	1946-20120404-9	4/4/12@17:41:32
^ SHIPPED		
<input type="radio"/>	1946-20120326-5	3/26/12@16:14:40
<input type="radio"/>	1946-20120330-26	4/2/12@08:45:24
<input type="radio"/>	1946-20120402-29	4/2/12@15:53:43
<input type="radio"/>	1946-20120402-32	4/2/12@16:26:44
<input type="radio"/>	1946-20120404-2	4/4/12@12:37:17
<input type="radio"/>	1946-20120404-5	4/4/12@17:36:36
<input type="radio"/>	1946-20120404-6	4/4/12@17:38:17
<input type="radio"/>	1946-20120404-7	4/4/12@17:39:26
<input type="radio"/>	1946-20120404-8	4/4/12@17:41:20
^ CLOSED		
<input checked="" type="radio"/>	1946-20120302-5	3/14/12@16:52:43
<input type="radio"/>	1946-20120314-2	3/14/12@17:28:36
<input type="radio"/>	1946-20120314-4	3/14/12@17:42:34
<input type="radio"/>	1946-20120314-6	3/14/12@17:43:23

Figure 5-14: Manifest Maintenance Tab

3. Click the option button next to each invoice, as applicable, and then click the applicable button at the bottom of the **Manifest Maintenance** tab:
 - If you select an **Open** invoice, you can click the **Print** button.
 - If you select a **Shipped** invoice, you can click the **Print** button.
 - If you select a **Closed** invoice, you can click the **Print** or **Ship** button.
4. Click **Cancel** to cancel the manifest maintenance.

5.1.6 Using the Order/Test Status Function

Refer to Section 3.3.3.6 in the Orientation section for details.

To request a report view of the order or test statuses for a patient:

1. In the Ribbon Bar, click the **Manage** tab. The **Actions** section opens.
2. Click the **Order/Test Status** icon. The **Select a Patient** window opens.



Figure 5-15: Order/Test Status icon

- In the **Search by Name, DOB, SSN, or HRN** field, begin typing the desired criteria. The window refreshes with a list of patients matching your criteria.

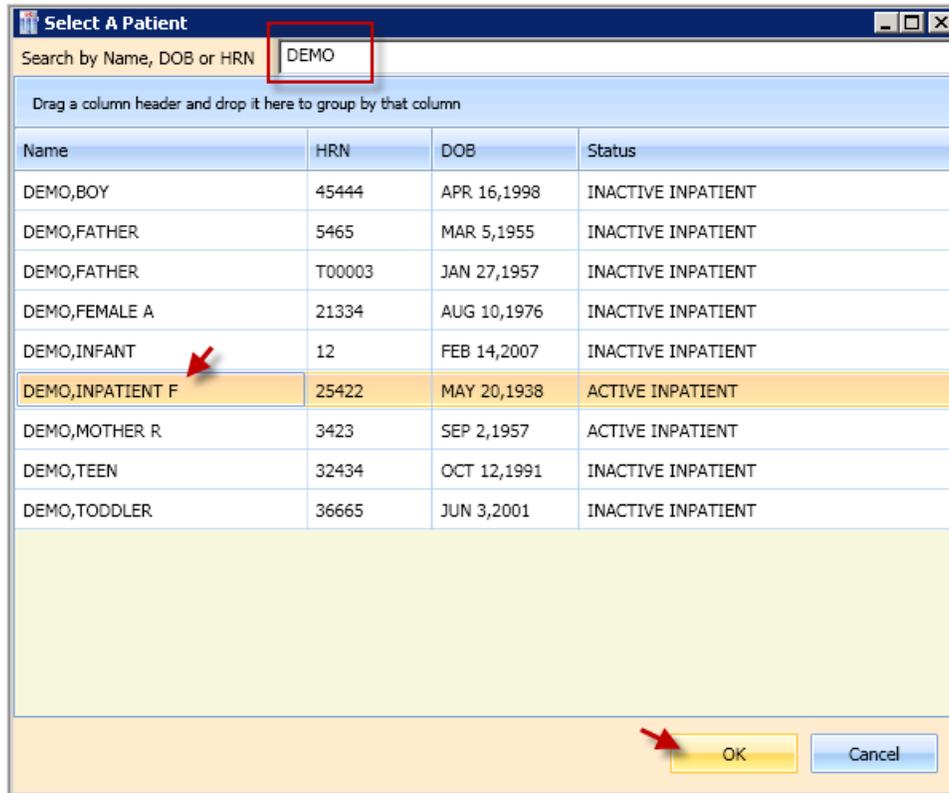


Figure 5-16: Search by Name, DOB, SSN or HRN

- Click to select the desired patient, and then click **OK**. The Tasks pane refreshes with a new **Order/Test Status** [patient name] tab, containing the following columns:
 - **Test** (order number and name of test)
 - **Urgency** (status, such as STAT)
 - **Status** (date and time or Collected)
 - **Accession** number (shows Accession # is accessioned)
 - **Sign or Symptom**
 - **Provider**

Test	Urgency	Status	Accession	Sign Or Symptom	Provider
^ 227					
URINALYSIS-DIPSTICK ONLY	STAT	Collected	UA 0104 1	Adjustment Disorder With Anxiety	USER.DEMO
^ 228					
PROTINE	STAT	for: 01/05/2012@06:00			USER.DEMO
POTASSIUM	STAT	for: 01/05/2012@06:00			USER.DEMO
^ 229					
PROTINE	STAT	for: 01/06/2012@06:00			USER.DEMO
POTASSIUM	STAT	for: 01/06/2012@06:00			USER.DEMO
^ 230					
PROTINE	STAT	for: 01/07/2012@06:00			USER.DEMO
^ 231					
PROTINE	STAT	for: 01/05/2012@06:00			USER.DEMO
^ 232					
PROTINE	STAT	for: 01/06/2012@06:00			USER.DEMO

Figure 5-17: View Order/Test Status Report

Note: The system displays the report in ascending order date, starting with the current (today's) date.

5. If you need to review orders for a future start date:
 - a. Click the calendar icon (). A calendar opens.
 - b. On the calendar, click to select the start date, and then click the Refresh button. The **Order/Test Status** tab refreshes with any future orders within your selected date range.
6. Click **OK** to close the **Order/Test Status** window.

5.1.7 Using the Delete Function

Delete accessioned tests not yet resulted in the lab package using these steps.

Refer to Section 3.3.3.7 in the Orientation section for details.

To delete tests:

1. In the Ribbon Bar, click the **Manage** tab. The **Actions** section opens.
2. Click the **Delete** icon.



Figure 5-18: Delete icon

The **Delete Test** tab opens.

<input type="checkbox"/>	Lab Test Name	Collection Date	Provider	Status	Reason	NP: <input type="text"/>
<input type="checkbox"/>	SO 0326 2					
<input checked="" type="checkbox"/>	ALDOLASE	3/26/2012@10:14	USER.DEMO	C	Discharge	hematology
<input type="checkbox"/>	SO 0326 3					
<input type="checkbox"/>	POTASSIUM	3/26/2012@10:15	USER.DEMO	C		
<input type="checkbox"/>	SO 0326 4					
<input type="checkbox"/>	ALDOLASE	3/26/2012@10:15	USER.DEMO	C		
<input type="checkbox"/>	SO 0326 5					
<input type="checkbox"/>	POTASSIUM	3/26/2012@10:15	USER.DEMO	C		
<input type="checkbox"/>	SO 0326 6					
<input type="checkbox"/>	ALDOLASE	3/26/2012@10:17	USER.DEMO	C		
<input type="checkbox"/>	SO 0326 7					
<input type="checkbox"/>	CHOLESTEROL	3/26/2012@10:17	USER.DEMO	C		
<input type="checkbox"/>	SO 0326 8					
<input type="checkbox"/>	LIVER FUNCTION (PANEL A)	3/26/2012@13:30	RUDD,MILES	C		
<input type="checkbox"/>	SO 0326 9					
<input type="checkbox"/>	CHOLESTEROL	3/26/2012@13:46	BYRON,ROBERT	C		

Figure 5-19: Delete Test with Discharge Reason and NP Example

- In the first column, click to select one of the checkboxes to select Lab Tests for deletion:
 - Click the box in the header to select all tests.
 - Click the box in the section to select all tests in that section.
 - Click the box next to an individual test to select it.
- In Accession Date, the current date defaults. Click the calendar icon () to select a different date, if needed.
- In Accession Area, click the applicable area from the drop-down menu. Sendouts is used in this example.

Note: You can select a different area from the drop-down menu, or select a different date, and then click the Refresh button. Only the tests relevant to the area or day you selected will show in the list.

6. Click the Reason button next to your selected test(s). The **Select a Reason** window opens.

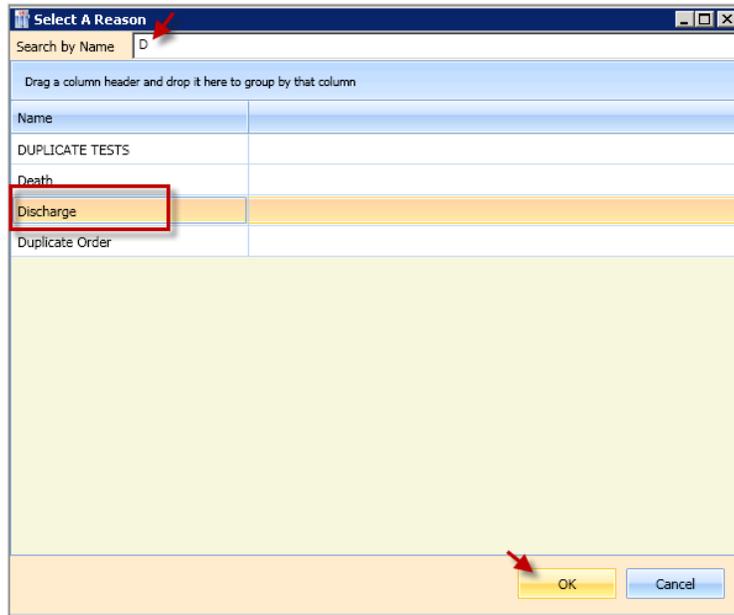


Figure 5-20: Select a Reason

- a. In the **Search by Name** field, begin typing the first few letters of the reason. The list refreshes with test reasons matching your selection.
 - b. Click to select a reason, and then click **OK**. The reason appears in the **Reason** column of the **Delete Test** tab.
7. In NP:, type a comment for the lab description screen. This describes the type of screen this lab description is associated with (such as, gram stain, hematology, microbiology, accession comments, or smear/prep).
 8. Click **OK**. A pop-up window opens, asking you to confirm the deletion of the selected tests.

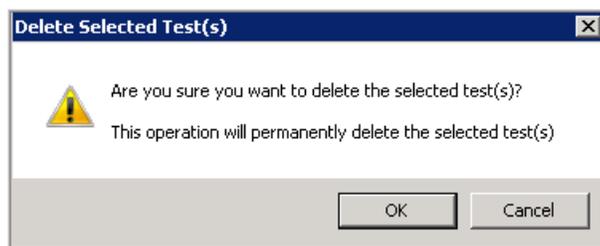


Figure 5-21: Delete Selected Test(s) confirmation

9. Click **OK** again. The selected tests are deleted.

5.2 GIS Manifest Functions

The following manifest functionality (from the **Manage** tab) is only available at GIS configured sites.

5.2.1 Re-printing Manifests

In the event a shipping manifest fails to print or a copy must be made, you can re-print a shipping manifest list for laboratory specimens sent outside the facility to a reference lab.

Refer to Section 3.3.4.1 in the Orientation section for details.

To re-print manifests:

1. In the Ribbon Bar, click the **Manage** tab. The **Actions** section opens.
2. Click the **Re-Print Manifest** icon. The **Re-Print Manifest** tab opens in the **Tasks** pane showing all accessioned labs for today.



Figure 5-22: Re-Print Manifest icon

3. Select the check box of the Accession Number(s) that you want to re-print the manifest(s) for, or select the check box in the header to select all of the Accession Numbers.
4. Click **OK**. The manifest is sent to the printer.

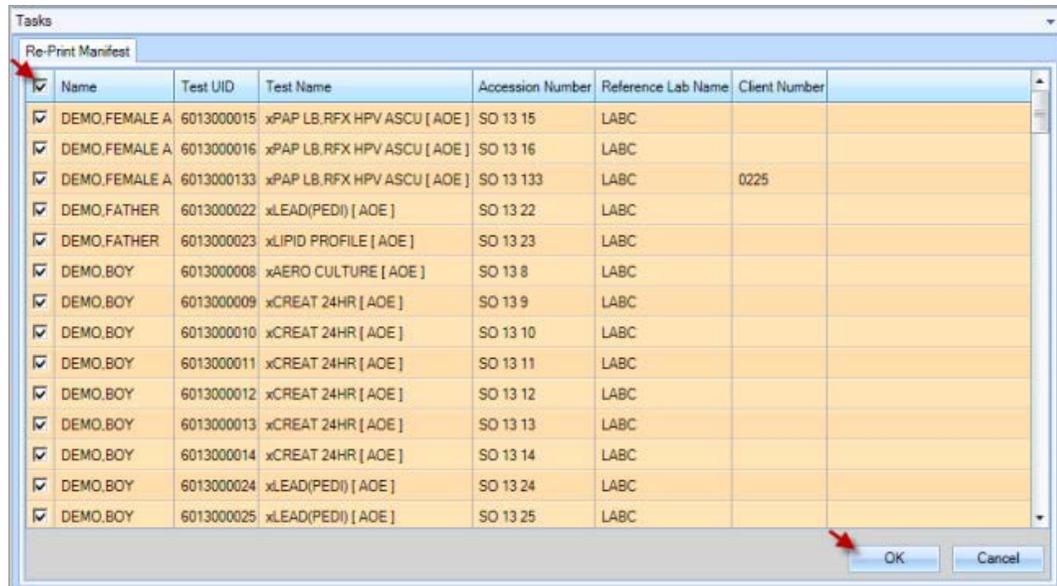


Figure 5-23: Selecting Accession Numbers to Print in Manifest

5.2.2 Re-Printing Labels

Refer to Section 3.3.4.2 in the Orientation section for details.

To re-print labels:

1. In the Ribbon Bar, click the **Manage** tab. The **Actions** section opens.
2. Click the **Re-Print Label** icon.



Figure 5-24: Re-Print Label icon

The **Re-Print Labels** tab opens in the **Tasks** pane.

3. Click to select the check box of the UID(s) for which you want to re-print the label(s), or click the check box in the header to select all of the UIDs.
4. Click **OK**. The labels are sent to the printer.

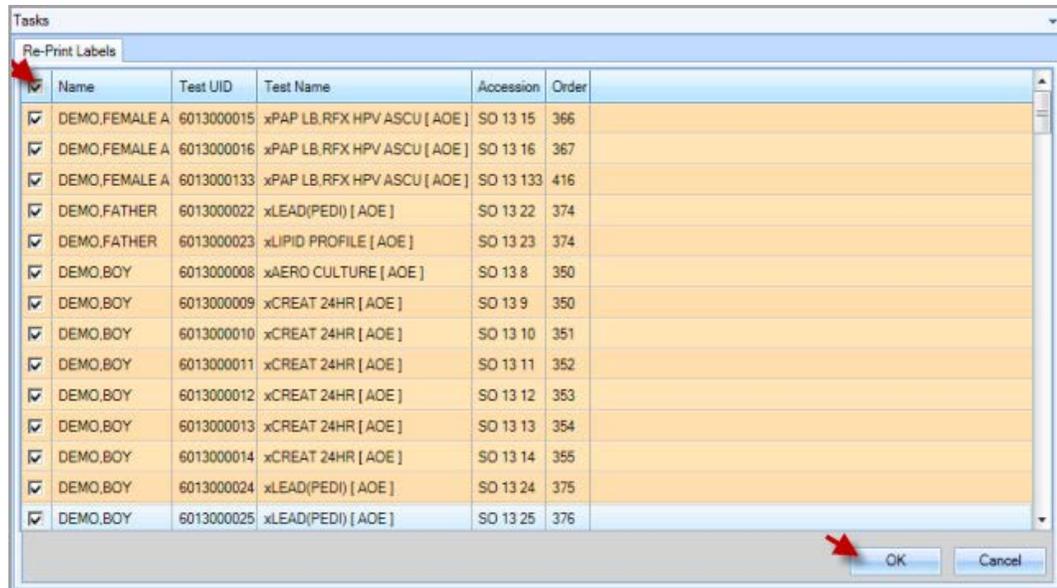


Figure 5-25: Selecting UIDs to Re-Print Labels

5.2.3 Using the Order/Test Status Function

Refer to Section 3.3.4.3 in the Orientation section for details.

To request a report view of the order or test statuses for a patient:

1. In the Ribbon Bar, click the **Manage** tab. The **Actions** section opens.
2. Click the **Order/Test Status** icon. The **Select a Patient** window opens.



Figure 5-26: Order/Test Status icon

3. In the **Search by Name, DOB, SSN, or HRN** field, begin typing the desired criteria. The window refreshes with a list of patients matching your criteria.

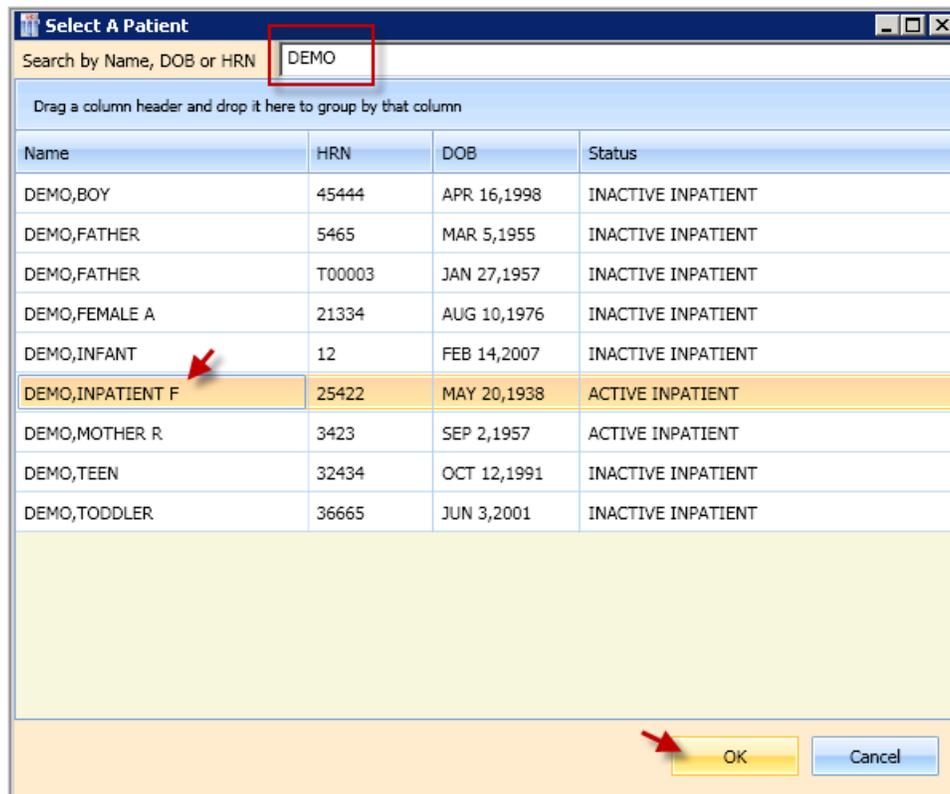


Figure 5-27: Search by Name, DOB, SSN or HRN

4. Click to select the desired patient, and then click OK. The Tasks pane refreshes with a new **Order/Test Status** [patient name] tab, containing the following columns:
 - **Test** (order number and name of test)
 - **Urgency** (status, such as STAT)
 - **Status** (date and time or Collected)
 - **Accession** status (shows Accession # is accessioned)
 - **Sign or Symptom**
 - **Provider**

Test	Urgency	Status	Accession	Sign Or Symptom	Provider
^ 227					
URINALYSIS-DIPSTICK ONLY	STAT	Collected	UA 0104 1	Adjustment Disorder With Anxiety	USER.DEMO
^ 228					
PROTIME	STAT	for: 01/05/2012@06:00			USER.DEMO
POTASSIUM	STAT	for: 01/05/2012@06:00			USER.DEMO
^ 229					
PROTIME	STAT	for: 01/06/2012@06:00			USER.DEMO
POTASSIUM	STAT	for: 01/06/2012@06:00			USER.DEMO
^ 230					
PROTIME	STAT	for: 01/07/2012@06:00			USER.DEMO
^ 231					
PROTIME	STAT	for: 01/05/2012@06:00			USER.DEMO
^ 232					
PROTIME	STAT	for: 01/06/2012@06:00			USER.DEMO

Figure 5-28: View Order/Test Status Report

Note: The system displays the report in ascending order date, starting with the current (today's) date.

5. If you need to review orders for a future start date:
 - a. Click the calendar icon (📅). A calendar opens.
 - b. On the calendar, click to select the start date, and then click the Refresh button. The **Order/Test Status** tab refreshes with any future orders within your selected date range.
6. Click **OK** to close the **Order/Test Status** window.

5.2.4 Using the Delete Function

Delete accessioned tests not yet resulted in the lab package using these steps.

Refer to Section 3.3.4.4 in the Orientation section for details

To delete tests:

1. In the Ribbon Bar, click the **Manage** tab. The **Actions** section opens.
2. Click the **Delete** icon.



Figure 5-29: Delete icon

The **Delete Test** tab opens.

<input type="checkbox"/>	Lab Test Name	Collection Date	Provider	Status	Reason	NP: <input type="text"/>
<input type="checkbox"/>	SO 0326 2					
<input checked="" type="checkbox"/>	ALDOLASE	3/26/2012@10:14	USER.DEMO	C	Discharge	hematology
<input type="checkbox"/>	SO 0326 3					
<input type="checkbox"/>	POTASSIUM	3/26/2012@10:15	USER.DEMO	C		
<input type="checkbox"/>	SO 0326 4					
<input type="checkbox"/>	ALDOLASE	3/26/2012@10:15	USER.DEMO	C		
<input type="checkbox"/>	SO 0326 5					
<input type="checkbox"/>	POTASSIUM	3/26/2012@10:15	USER.DEMO	C		
<input type="checkbox"/>	SO 0326 6					
<input type="checkbox"/>	ALDOLASE	3/26/2012@10:17	USER.DEMO	C		
<input type="checkbox"/>	SO 0326 7					
<input type="checkbox"/>	CHOLESTEROL	3/26/2012@10:17	USER.DEMO	C		
<input type="checkbox"/>	SO 0326 8					
<input type="checkbox"/>	LIVER FUNCTION (PANEL A)	3/26/2012@13:30	RUDD,MILES	C		
<input type="checkbox"/>	SO 0326 9					
<input type="checkbox"/>	CHOLESTEROL	3/26/2012@13:46	BYRON,ROBERT	C		

Figure 5-30: Delete Test with Discharge Reason and NP Example

- In the first column, click to select one of the checkboxes to select Lab Tests for deletion:
 - Click the box in the header to select all tests.
 - Click the box in the section to select all tests in that section.
 - Click the box next to an individual test to select it.
- In Accession Date, the current date defaults. Click the calendar icon () to select a different date, if needed.
- In Accession Area, click the applicable area from the drop-down menu. Sendouts is used in this example.

Note: You can select a different area from the drop-down menu, or select a different date, and then click the Refresh button. Only the tests relevant to the area or day you selected will show in the list.

6. Click the **Reason** button next to your selected test(s). The **Select a Reason** window opens.

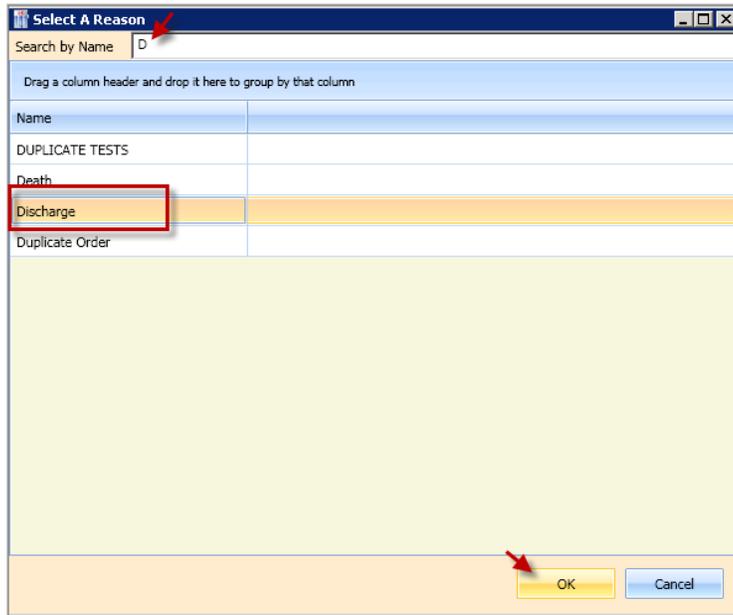


Figure 5-31: Select a Reason

- a. In the **Search by Name** field, begin typing the first few letters of the reason. The list refreshes with test reasons matching your selection.
 - b. Click to select a reason, and then click **OK**. The reason appears in the Reason column of the **Delete Test** tab.
7. In NP:, type a comment for the lab description screen. This describes the type of screen this lab description is associated with (such as, gram stain, hematology, microbiology, accession comments, or smear/prep).
 8. Click **OK**. A pop-up window opens, asking you to confirm the deletion of the selected tests.

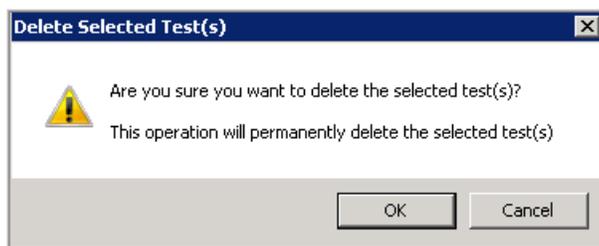


Figure 5-32: Delete Selected Test(s) confirmation

9. Click **OK** again. The selected tests are deleted.

Appendix A: Rules of Behavior

The Resource and Patient Management (RPMS) system is a United States Department of Health and Human Services (HHS), Indian Health Service (IHS) information system that is **FOR OFFICIAL USE ONLY**. The RPMS system is subject to monitoring; therefore, no expectation of privacy shall be assumed. Individuals found performing unauthorized activities are subject to disciplinary action including criminal prosecution.

All users (Contractors and IHS Employees) of RPMS will be provided a copy of the Rules of Behavior (RoB) and must acknowledge that they have received and read them prior to being granted access to a RPMS system, in accordance IHS policy.

- For a listing of general ROB for all users, see the most recent edition of *IHS General User Security Handbook* (SOP 06-11a).
- For a listing of system administrators/managers rules, see the most recent edition of the *IHS Technical and Managerial Handbook* (SOP 06-11b).

Both documents are available at this IHS Web site: <http://security.ihs.gov/>.

The ROB listed in the following sections are specific to RPMS.

A.1 All RPMS Users

In addition to these rules, each application may include additional RoBs that may be defined within the documentation of that application (e.g., Dental, Pharmacy).

A.1.1 Access

RPMS users shall

- Only use data for which you have been granted authorization.
- Only give information to personnel who have access authority and have a need to know.
- Always verify a caller's identification and job purpose with your supervisor or the entity provided as employer before providing any type of information system access, sensitive information, or nonpublic agency information.
- Be aware that personal use of information resources is authorized on a limited basis within the provisions *Indian Health Manual* Part 8, "Information Resources Management," Chapter 6, "Limited Personal Use of Information Technology Resources."

RPMS users shall not

- Retrieve information for someone who does not have authority to access the information.

- Access, research, or change any user account, file, directory, table, or record not required to perform their *official* duties.
- Store sensitive files on a PC hard drive, or portable devices or media, if access to the PC or files cannot be physically or technically limited.
- Exceed their authorized access limits in RPMS by changing information or searching databases beyond the responsibilities of their jobs or by divulging information to anyone not authorized to know that information.

A.1.2 Information Accessibility

RPMS shall restrict access to information based on the type and identity of the user. However, regardless of the type of user, access shall be restricted to the minimum level necessary to perform the job.

RPMS users shall

- Access only those documents they created and those other documents to which they have a valid need-to-know and to which they have specifically granted access through an RPMS application based on their menus (job roles), keys, and FileMan access codes. Some users may be afforded additional privileges based on the functions they perform, such as system administrator or application administrator.
- Acquire a written preauthorization in accordance with IHS policies and procedures prior to interconnection to or transferring data from RPMS.

A.1.3 Accountability

RPMS users shall

- Behave in an ethical, technically proficient, informed, and trustworthy manner.
- Log out of the system whenever they leave the vicinity of their personal computers (PCs).
- Be alert to threats and vulnerabilities in the security of the system.
- Report all security incidents to their local Information System Security Officer (ISSO)
- Differentiate tasks and functions to ensure that no one person has sole access to or control over important resources.
- Protect all sensitive data entrusted to them as part of their government employment.
- Abide by all Department and Agency policies and procedures and guidelines related to ethics, conduct, behavior, and information technology (IT) information processes.

A.1.4 Confidentiality

RPMS users shall

- Be aware of the sensitivity of electronic and hard copy information, and protect it accordingly.
- Store hard copy reports/storage media containing confidential information in a locked room or cabinet.
- Erase sensitive data on storage media prior to reusing or disposing of the media.
- Protect all RPMS terminals from public viewing at all times.
- Abide by all Health Insurance Portability and Accountability Act (HIPAA) regulations to ensure patient confidentiality.

RPMS users shall not

- Allow confidential information to remain on the PC screen when someone who is not authorized to that data is in the vicinity.
- Store sensitive files on a portable device or media without encrypting.

A.1.5 Integrity

RPMS users shall

- Protect their systems against viruses and similar malicious programs.
- Observe all software license agreements.
- Follow industry standard procedures for maintaining and managing RPMS hardware, operating system software, application software, and/or database software and database tables.
- Comply with all copyright regulations and license agreements associated with RPMS software.

RPMS users shall not

- Violate federal copyright laws.
- Install or use unauthorized software within the system libraries or folders.
- Use freeware, shareware, or public domain software on/with the system without their manager's written permission and without scanning it for viruses first.

A.1.6 System Logon

RPMS users shall

- Have a unique User Identification/Account name and password.

- Be granted access based on authenticating the account name and password entered.
- Be locked out of an account after five successive failed login attempts within a specified time period (e.g., one hour).

A.1.7 Passwords

RPMS users shall

- Change passwords a minimum of every 90 days.
- Create passwords with a minimum of eight characters.
- If the system allows, use a combination of alpha-numeric characters for passwords, with at least one uppercase letter, one lower case letter, and one number. It is recommended, if possible, that a special character also be used in the password.
- Change vendor-supplied passwords immediately.
- Protect passwords by committing them to memory or store them in a safe place (do not store passwords in login scripts or batch files).
- Change passwords immediately if password has been seen, guessed, or otherwise compromised, and report the compromise or suspected compromise to their ISSO.
- Keep user identifications (IDs) and passwords confidential.

RPMS users shall not

- Use common words found in any dictionary as a password.
- Use obvious readable passwords or passwords that incorporate personal data elements (e.g., user's name, date of birth, address, telephone number, or social security number; names of children or spouses; favorite band, sports team, or automobile; or other personal attributes).
- Share passwords/IDs with anyone or accept the use of another's password/ID, even if offered.
- Reuse passwords. A new password must contain no more than five characters per eight characters from the previous password.
- Post passwords.
- Keep a password list in an obvious place, such as under keyboards, in desk drawers, or in any other location where it might be disclosed.
- Give a password out over the phone.

A.1.8 Backups

RPMS users shall

- Plan for contingencies such as physical disasters, loss of processing, and disclosure of information by preparing alternate work strategies and system recovery mechanisms.
- Make backups of systems and files on a regular, defined basis.
- If possible, store backups away from the system in a secure environment.

A.1.9 Reporting

RPMS users shall

- Contact and inform their ISSO that they have identified an IT security incident and begin the reporting process by providing an IT Incident Reporting Form regarding this incident.
- Report security incidents as detailed in the *IHS Incident Handling Guide* (SOP 05-03).

RPMS users shall not

- Assume that someone else has already reported an incident. The risk of an incident going unreported far outweighs the possibility that an incident gets reported more than once.

A.1.10 Session Timeouts

RPMS system implements system-based timeouts that back users out of a prompt after no more than 5 minutes of inactivity.

RPMS users shall

- Utilize a screen saver with password protection set to suspend operations at no greater than 10 minutes of inactivity. This will prevent inappropriate access and viewing of any material displayed on the screen after some period of inactivity.

A.1.11 Hardware

RPMS users shall

- Avoid placing system equipment near obvious environmental hazards (e.g., water pipes).
- Keep an inventory of all system equipment.
- Keep records of maintenance/repairs performed on system equipment.

RPMS users shall not

- Eat or drink near system equipment.

A.1.12 Awareness

RPMS users shall

- Participate in organization-wide security training as required.
- Read and adhere to security information pertaining to system hardware and software.
- Take the annual information security awareness.
- Read all applicable RPMS manuals for the applications used in their jobs.

A.1.13 Remote Access

Each subscriber organization establishes its own policies for determining which employees may work at home or in other remote workplace locations. Any remote work arrangement should include policies that

- Are in writing.
- Provide authentication of the remote user through the use of ID and password or other acceptable technical means.
- Outline the work requirements and the security safeguards and procedures the employee is expected to follow.
- Ensure adequate storage of files, removal, and nonrecovery of temporary files created in processing sensitive data, virus protection, and intrusion detection, and provide physical security for government equipment and sensitive data.
- Establish mechanisms to back up data created and/or stored at alternate work locations.

Remote RPMS users shall

- Remotely access RPMS through a virtual private network (VPN) whenever possible. Use of direct dial in access must be justified and approved in writing and its use secured in accordance with industry best practices or government procedures.

Remote RPMS users shall not

- Disable any encryption established for network, internet, and Web browser communications.

A.2 RPMS Developers

RPMS developers shall

- Always be mindful of protecting the confidentiality, availability, and integrity of RPMS when writing or revising code.
- Always follow the IHS RPMS Programming Standards and Conventions (SAC) when developing for RPMS.
- Only access information or code within the namespaces for which they have been assigned as part of their duties.
- Remember that all RPMS code is the property of the U.S. Government, not the developer.
- Not access live production systems without obtaining appropriate written access, and shall only retain that access for the shortest period possible to accomplish the task that requires the access.
- Observe separation of duties policies and procedures to the fullest extent possible.
- Document or comment all changes to any RPMS software at the time the change or update is made. Documentation shall include the programmer's initials, date of change, and reason for the change.
- Use checksums or other integrity mechanism when releasing their certified applications to assure the integrity of the routines within their RPMS applications.
- Follow industry best standards for systems they are assigned to develop or maintain, and abide by all Department and Agency policies and procedures.
- Document and implement security processes whenever available.

RPMS developers shall not

- Write any code that adversely impacts RPMS, such as backdoor access, "Easter eggs," time bombs, or any other malicious code or make inappropriate comments within the code, manuals, or help frames.
- Grant any user or system administrator access to RPMS unless proper documentation is provided.
- Release any sensitive agency or patient information.

A.3 Privileged Users

Personnel who have significant access to processes and data in RPMS, such as, system security administrators, systems administrators, and database administrators, have added responsibilities to ensure the secure operation of RPMS.

Privileged RPMS users shall

- Verify that any user requesting access to any RPMS system has completed the appropriate access request forms.
- Ensure that government personnel and contractor personnel understand and comply with license requirements. End users, supervisors, and functional managers are ultimately responsible for this compliance.
- Advise the system owner on matters concerning information technology security.
- Assist the system owner in developing security plans, risk assessments, and supporting documentation for the certification and accreditation process.
- Ensure that any changes to RPMS that affect contingency and disaster recovery plans are conveyed to the person responsible for maintaining continuity of operations plans.
- Ensure that adequate physical and administrative safeguards are operational within their areas of responsibility and that access to information and data is restricted to authorized personnel on a need-to-know basis.
- Verify that users have received appropriate security training before allowing access to RPMS.
- Implement applicable security access procedures and mechanisms, incorporate appropriate levels of system auditing, and review audit logs.
- Document and investigate known or suspected security incidents or violations and report them to the ISSO, Chief Information Security Officer (CISO), and systems owner.
- Protect the supervisor, superuser, or system administrator passwords.
- Avoid instances where the same individual has responsibility for several functions (i.e., transaction entry and transaction approval).
- Watch for unscheduled, unusual, and unauthorized programs.
- Help train system users on the appropriate use and security of the system.
- Establish protective controls to ensure the accountability, integrity, confidentiality, and availability of the system.
- Replace passwords when a compromise is suspected. Delete user accounts as quickly as possible from the time that the user is no longer authorized system. Passwords forgotten by their owner should be replaced, not reissued.

- Terminate user accounts when a user transfers or has been terminated. If the user has authority to grant authorizations to others, review these other authorizations. Retrieve any devices used to gain access to the system or equipment. Cancel logon IDs and passwords, and delete or reassign related active and backup files.
- Use a suspend program to prevent an unauthorized user from logging on with the current user's ID if the system is left on and unattended.
- Verify the identity of the user when resetting passwords. This can be done either in person or having the user answer a question that can be compared to one in the administrator's database.
- Shall follow industry best standards for systems they are assigned to, and abide by all Department and Agency policies and procedures.

Privileged RPMS users shall not

- Access any files, records, systems, etc., that are not explicitly needed to perform their duties
- Grant any user or system administrator access to RPMS unless proper documentation is provided.
- Release any sensitive agency or patient information.

Contact Information

If you have any questions or comments regarding this distribution, contact the OIT User Support (IHS) by:

Phone: (505) 248-4371 or (888) 830-7280

Fax: (505) 248-4363

Web: <http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm>

Email: support@ihs.gov