

Create BC Reports

PURPOSE

1. Prepare Case Review data for clinicians.
2. Reduce the number of errors and omissions.
3. Create continuity with labeling and processing.
4. Improve the quality of work within our clinic.

PROCEDURE

Expected time frame: Several times per week.

1. In Dropbox, choose Patient Coordination → Labs for the EHR → CR Lab Results.
2. Open the file “LabCorp BC Report.xlsx”
3. Open a patient’s lab report and look at the sex of the patient:

If male:

1. Click on the “women” tab, hold down the shift key, then click on the “MW alt” tab (this will highlight that last four worksheet tabs).
2. Right-click on one of the tabs and choose “delete.” This should leave only one worksheet tab remaining in the workbook (the one entitled “men”).

If female:

1. While holding down the shift key, click on each worksheet tab you do not want to use.
2. Right-click on one of the tabs and choose “delete.” This should leave only one worksheet tab remaining in the workbook (based on age and reference interval ranges, as described in the flowchart above).
4. In row 1, columns B & E (where it shows “[NAME]”), type the patient’s first and last names, in capital letters.
5. In row 1, columns H, I, & J (where it shows “[DATE]”), type the collection date.
6. Fill in column B (“Value”) from the “result” column on the lab report.
7. Check the values in columns F & G (“LR Low” and “LR High”) against the “reference interval” on the lab report. If any are different on the worksheet, *change these columns only* to match the lab report. (Note: columns H & J will automatically update when you change columns F & G.)
8. In row 74, column B (next to “Prepared” in column A), put your date/initial stamp.
9. In the Additional Tests section (rows 60-70), right-click and choose “delete” on any rows where there are no values.
10. Go back through the worksheet, proofreading to make sure each value was typed correctly according to what is shown on the lab report. Tip: pay special attention to any rows

completely highlighted in the salmon color. These rows are out of range for both the functional and lab ranges. If the value you typed is WAY out of range, this is a good clue it was mistyped.

11. Save the worksheet in Dropbox → Patient Coordination → Labs for the EHR → CR Lab Results → BC Charts - Word Documents with the following name format: [*collection date as yyyy.mm.dd*] [*pt first last name*] [*lab name*] BC Report.

For example:

2015.06.12 John Doe LabCorp BC Report

2015.03.27 John Doe Kaiser BC Report

12. Right-click on the row that shows “prepared” and your date/initial stamp, then choose “hide.”
13. Highlight columns F & G, then right-click and choose “hide.”
14. Print to save as a PDF with the same name into your Dropbox Patient Records folder.
15. Close Excel (but do NOT save these “hide” changes to your worksheet) and the lab report.
16. In EHR, pull the patient’s chart.
17. In the orange tabbed section at the bottom of the Patient Dashboard, make sure you see the lab report in the “unreviewed tab.” If it is there, delete it from the Dropbox. If it is not there, follow the steps below to add it along with the PDF you just created, then delete it from the Dropbox.
18. In the orange tabbed section at the bottom of the Patient Dashboard, click the “+” to add the PDF file.
19. Choose the file from your Dropbox “Patient Records” folder.

Leave the title the same as you already named it (2015.06.12 John Doe LabCorp BC Report).
20. Type of Document: “Labs.”
21. Should it be filed under the appropriate tab: leave on unreviewed tab.
22. Patient Notification: leave to default (notification not needed).
23. Do not mark it for “Needs to be Reviewed by Doctor.”
24. Do not allow the patient to see in their portal account.
25. Do not add document to Past Medical History.
26. Click “Upload Document.”
27. Click to preview it to make sure it loaded correctly.
28. Delete the PDF from your Dropbox.