Upload Lab Results Into the EHR

PURPOSE

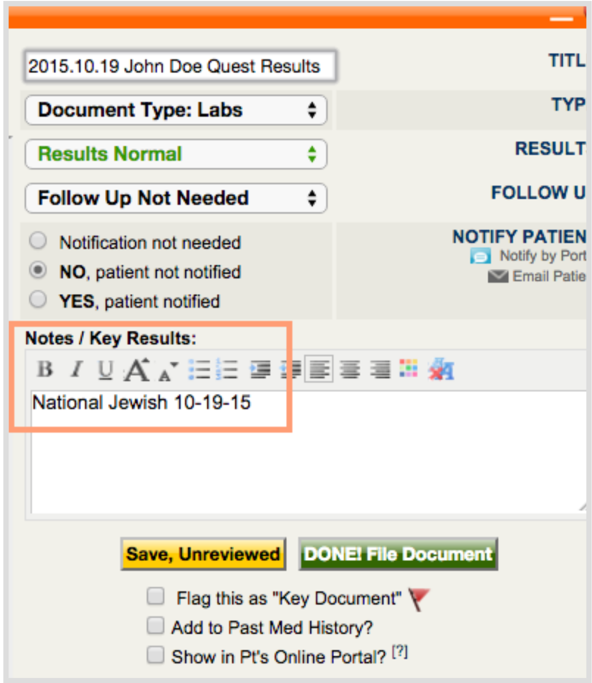
1. Import patient lab results to patient's charts.
2. Reduce the number of errors and omissions.
3. Create continuity with labeling and processing.
4. Improve the quality of work within our clinic.

PROCEDURE

Import Results from the Dropbox Patient Coordination>Labs for the EHR folder

Expected time frame: Several times per week

1. In Cerbo, open the patient's chart.
2. In the orange tabbed section at the bottom of the Patient Dashboard, click the "+" to add the PDF file.
3. Choose the file from the Labs for the EHR Dropbox folder.
   Leave the title the same as you already named it. (2015.06.12 John Doe LabCorp BC Report) (date is the date the sample was collected)
4. Type of Document: "Labs."
5. Should it be filed under the appropriate tab: leave on unreviewed tab.
6. Patient Notification: leave to default (notification not needed).
7. Do not mark it for "Needs to be Reviewed by Doctor."
8. Do not allow the patient to see in their portal account.
9. Do not add document to Past Medical History.
10. Click "Upload Document."
11. Click to open it to make sure it loaded correctly.
12. If clinician requests it, in the Notes/Key Results box, put the lab name and date of collection. Example:

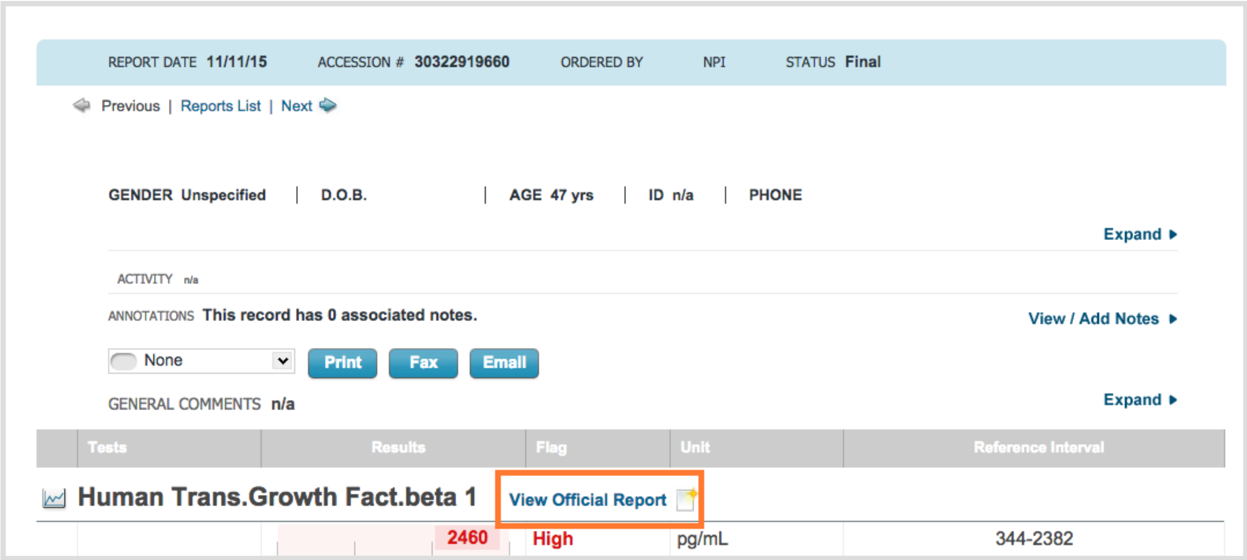


13. Go through the results and match each result to the corresponding order in the "match to open orders?" box. Make sure you do not match results to an order if there is no result listed on the document. Many labs will list the ordered tests, but sometimes the result is shown as "pending" or "unable to be performed," or only partial results were received. In these cases, do NOT match to an open order.
14. Delete the PDF from the dropbox.

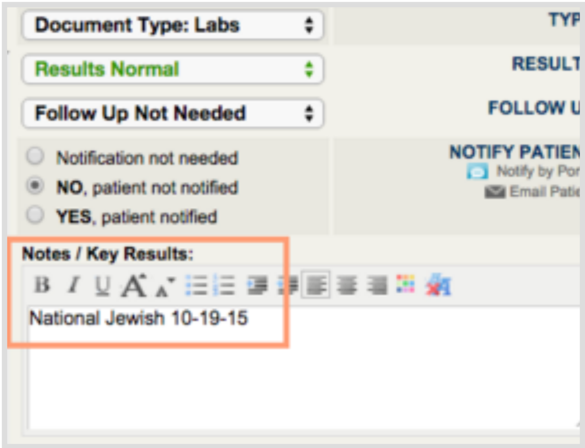
Import Results from LabCorp Beacon

Expected time frame: At least once a day

1. Go to **https://www.labcorpbeacon.com/results-web/results/authentication/public/login** and log in using the credentials on Vendor Lists & Credentials.
2. Any results that are bolded are new results.
3. Only download new results with the status of "final" (do not download "preliminary" status results).
4. Click on the accession number to open the results.
5. Click on "view official report" to see the downloadable result report.



6. Print/Save the results as a PDF.
7. Name for Document: [date of collection as yyyy.mm.dd] [patient first name last name] LabCorp Results. Ex: 2015.10.19 John Doe LabCorp Results
8. In Cerbo, open the patient's chart and check the clinician.
9. In the orange tabbed section at the bottom of the Patient Dashboard, click the "+" to add the PDF file.
10. Type of Document: Labs
11. Patient Notification: Not Needed
12. If clinician requests it, in the Notes/Key Results box, put the lab name and date of collection. Example:



13. Needs to be reviewed by doctor: select the clinician of record.

14. Do not mark to allow the patient to see this document in their portal account or add to past med history.

15. Upload document.

16. Click to open the document.

17. Go through the results and match each result to the corresponding order in the "match to open orders?" box. Make sure you do not match results to an order if there is no result listed on the document. Many labs will list the ordered tests, but sometimes the result is shown as "pending" or "unable to be performed," or only partial results were received. In these cases, do NOT match to an open order.

18. Review the remaining open orders. If there are any markers that were ordered on the same date as the ones you marked off that you just received, you will need to contact the lab to see if these markers were missed or are still pending.

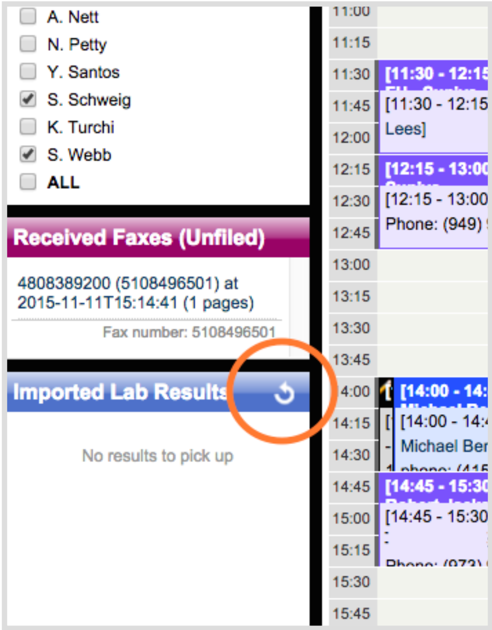
19. Make a note in the Notes/Key Results box about the missing markers for the clinician, and also put a sticky note in the chart. Contact the patient for a recollection for any missed markers.

20. Repeat the above steps for each new, final result in Beacon.

Import Results from the Cerbo Imported Lab Results

Expected time frame: At least once a day

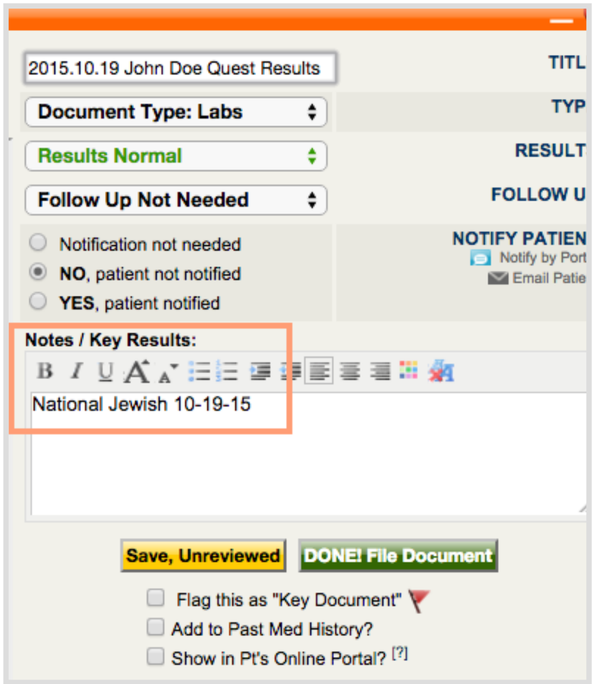
1. From the Scheduling page in Cerbo, click to refresh the Imported Lab Results so it pulls in any new results.



2. Click on the first retrieved result to open it.

3. Name for Document: [date of collection as yyyy.mm.dd] [patient first name last name] Quest Results. Ex: 2015.10.19 John Doe Quest Results

4. Leave all other defaults and “assign to this patient.”
5. Open the patient’s chart and check the clinician.
6. In the orange tabbed section at the bottom of the Patient Dashboard, click on the file name to open the lab results again.
7. Make sure the results are flagged to the correct clinician.
8. If clinician requests it, in the Notes/Key Results box, put the lab name and date of collection. Example:



9. Do not mark to flag this as a key document, add to past med history, or show in pt’s online portal.
10. Go through the results and match each result to the corresponding order in the “match to open orders?” box. Make sure you do not match results to an order if there is no result listed on the document. Many labs will list the ordered tests, but sometimes the result is shown as “pending” or “unable to be performed,” or only partial results were received. In these cases, do NOT match to an open order.
11. Review the remaining open orders. If there are any markers that were ordered on the same date as the ones you marked off that you just received, you will need to contact the lab to see if these markers were missed or are still pending.
12. Make a note in the Notes/Key Results box about the missing markers for the clinician, and also put a sticky note in the chart. Contact the patient for a recollection for any missed markers.
13. Repeat the above steps for each retrieved result.