April 14, 2016

AGENDA

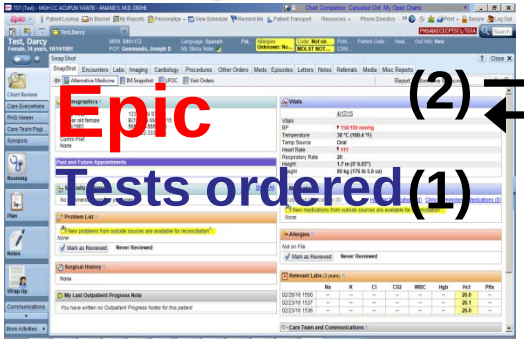
- **Lab order essentials**
- **Workflow demo**
  - Placing orders
    - Core Lab
    - Micro
    - Blood bank
    - Miscellaneous tests, Add-ons
    - Anatomic pathology
  - Encounter types
  - Releasing orders
  - Collecting specimens
  - Wrap up (venipuncture charges)
- **Point of Care Tests**
  - Manual entry, reporting lab

April 2, 2016 Workflows

Laboratory specimen = Chem, heme, sendouts, micro, blood bank

Pathology specimen = Pap smears, cytology, biopsies

Specimen labels (4)
(Sunquest label printer)



Tests ordered (1)

Orders released (2)

Status updates

Laboratory specimens

Sunquest Lab (3)

Mediware Blood Bank

ADT specimen label and printed requisition

Sunquest Pathology

Pathology specimens

Surgical Pathology requisition (PHS laser printer)

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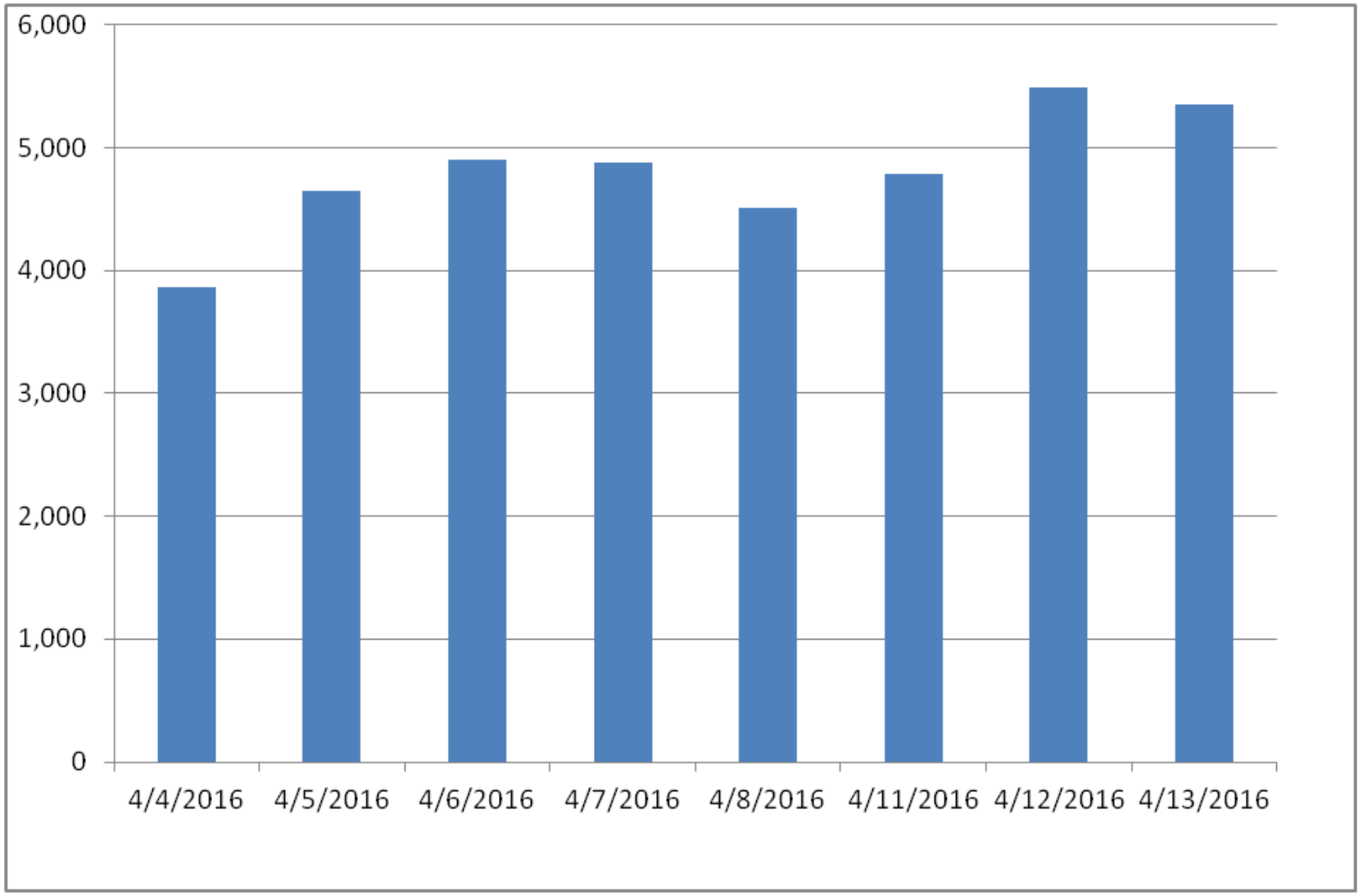
Outpatient Volume (4/4-4/13)



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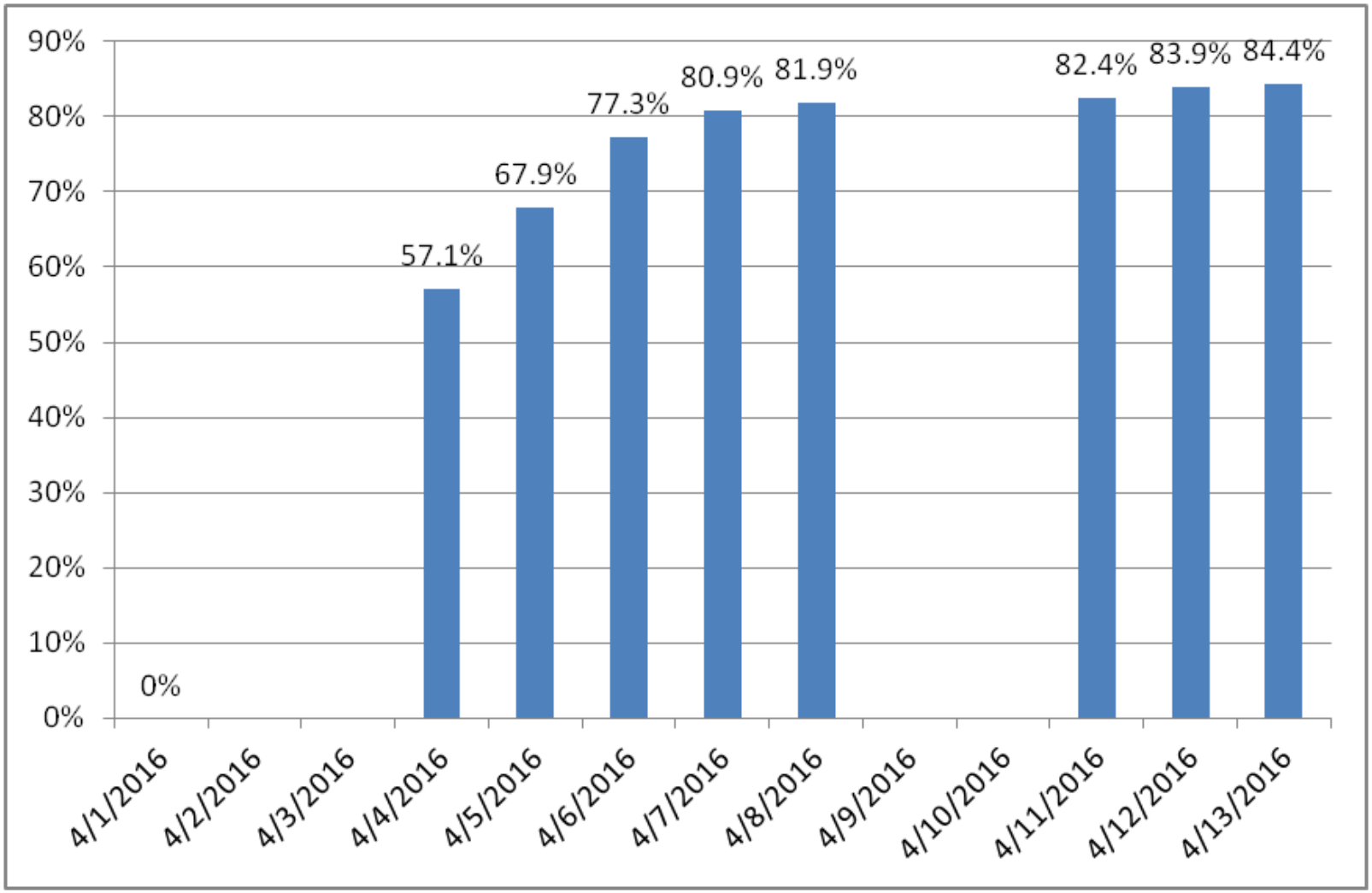
Outpatient Orders Placed in Epic (4/1-4/13)



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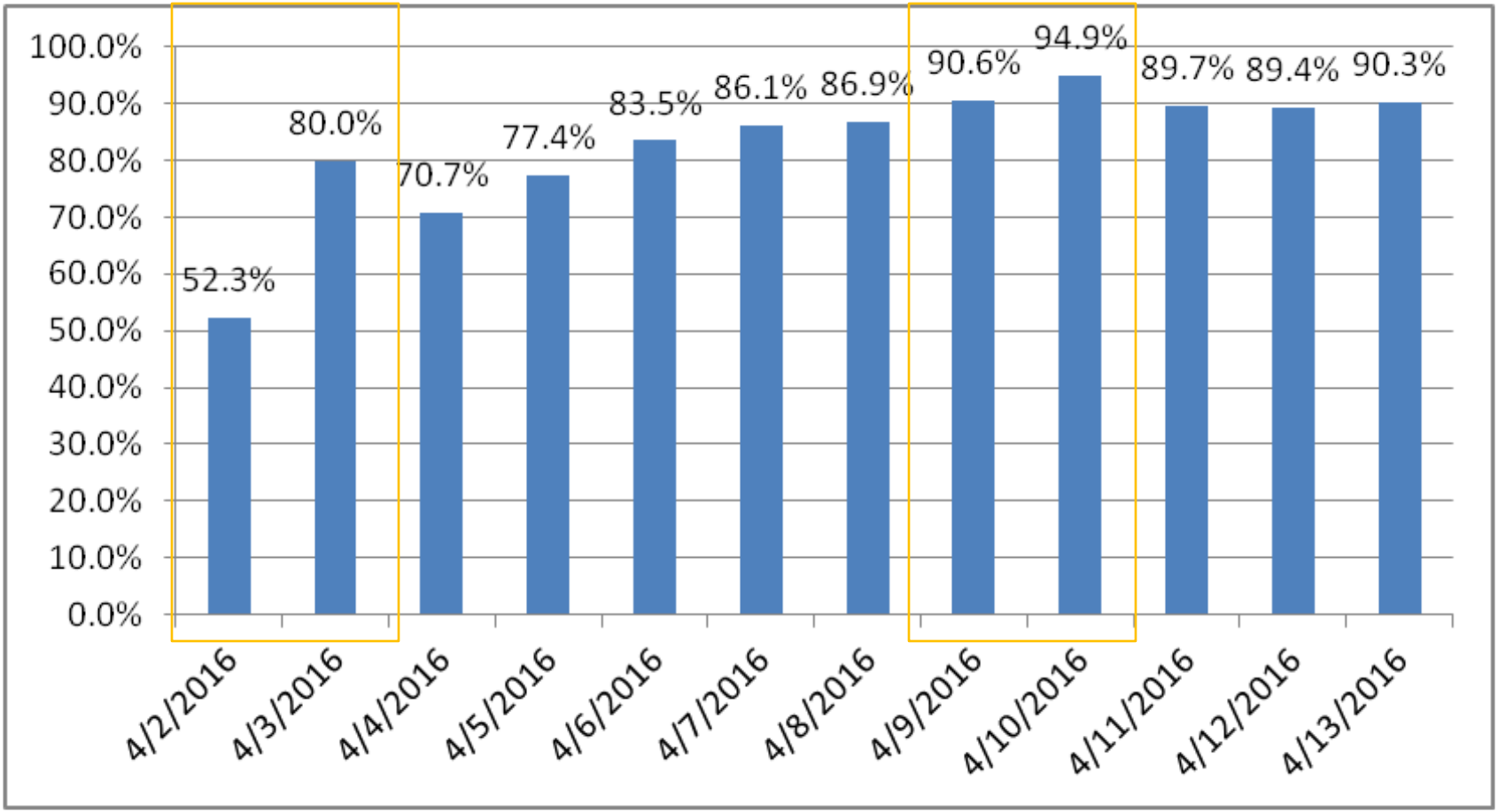
All Areas (IP/OP/ED): Orders Placed in Epic (4/1-4/13)



= Weekends

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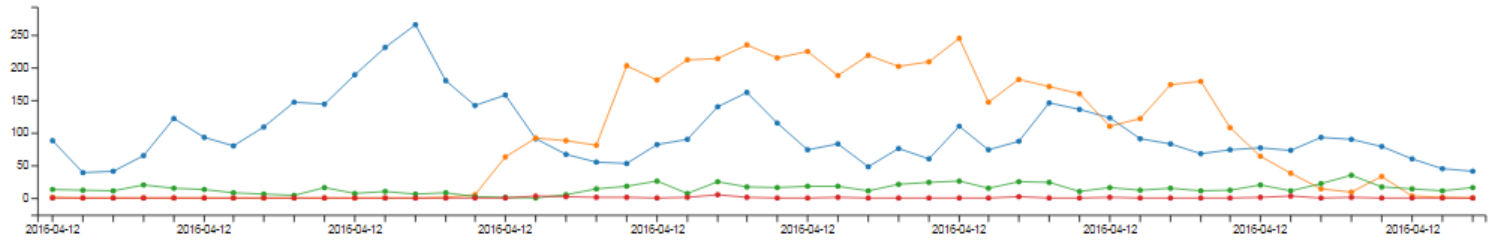
Laboratory Metrics for Epic

Traffic

Cumulative Traffic

Inpatient:	Outpatient:	Emergency:	Outside:
4840 samples (48.69%)	4394 samples (44.20%)	684 samples (6.88%)	23 samples (0.23%)

Samples Accessioned from 2016-04-12 to 2016-04-12



Epic Practice Patterns

Cumulative Orders

Total Epic Orders:

14365 (87.47%)

Total Non-Epic Orders:

2058 (12.53%)

View By Location | View By Test

Inpatient Ordering By Specific Location

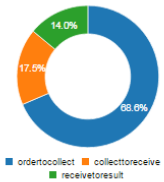
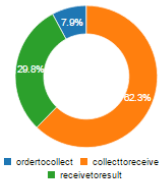
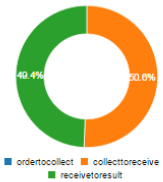
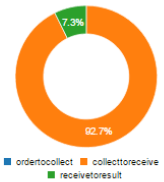
Show 10 entries Search:

Copy | Excel | PDF | Print

Location Name	Num Epic	% Epic	Num Non-Epic	% Non-Epic	Total	
MGH_EMER	728	92.385786802	60	7.614213198	788	View Tests
MGH_B08	444	83.615819209	87	16.384180791	531	View Tests

Turnaround Time

Overall Turnaround Times

Inpatient	Outpatient	Emergency	Outside
			
Collect to Result: 02:19:00	Collect to Result: 04:55:00	Collect to Result: 01:17:00	Collect to Result: 11:20:00

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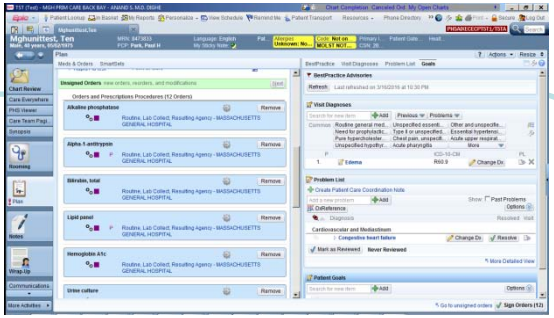
Turning an Order into a Label

Order

- **Order** lab test
  - During provider visit
  - Orders only encounter



Release

- **Release** order from within a valid encounter
- when ready to collect

Document collection details

- **Document Collection** details

Print

- Lab (Sunquest) label **Prints**

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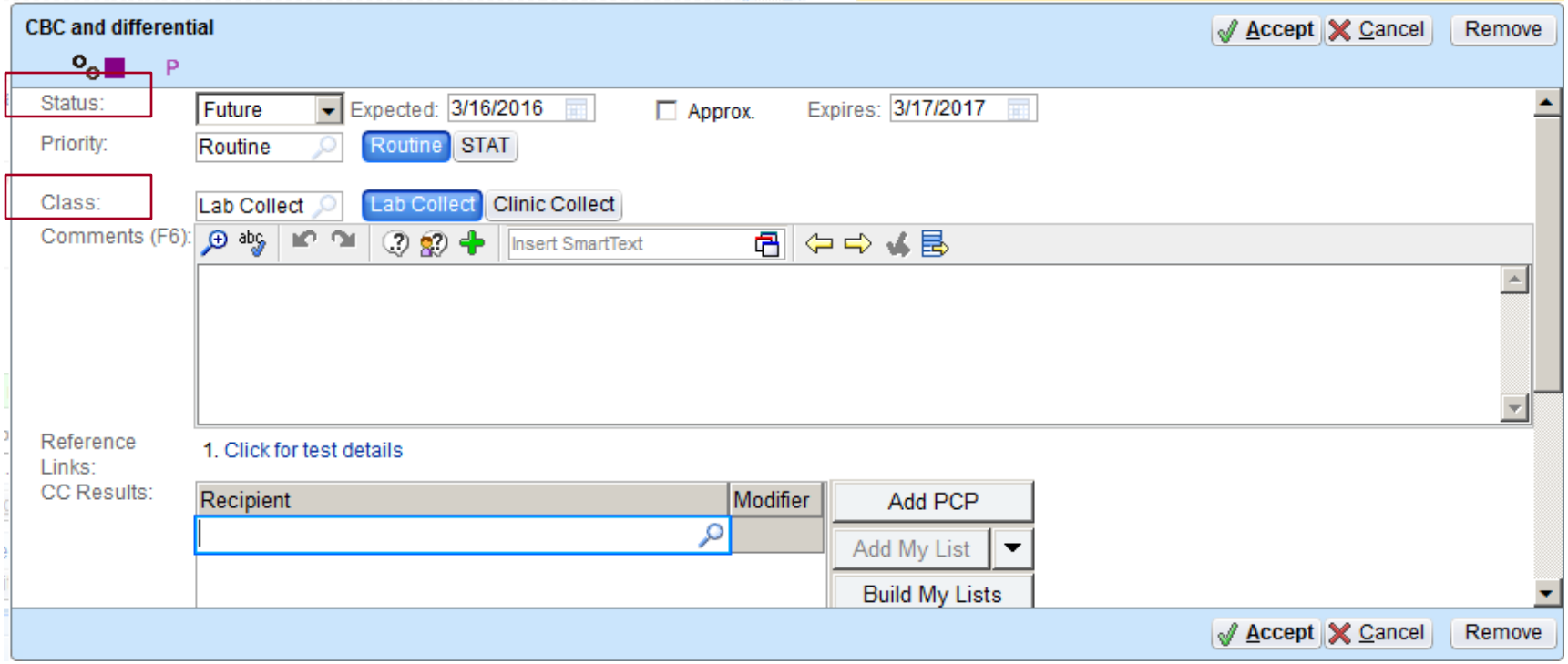
Order Details Screen



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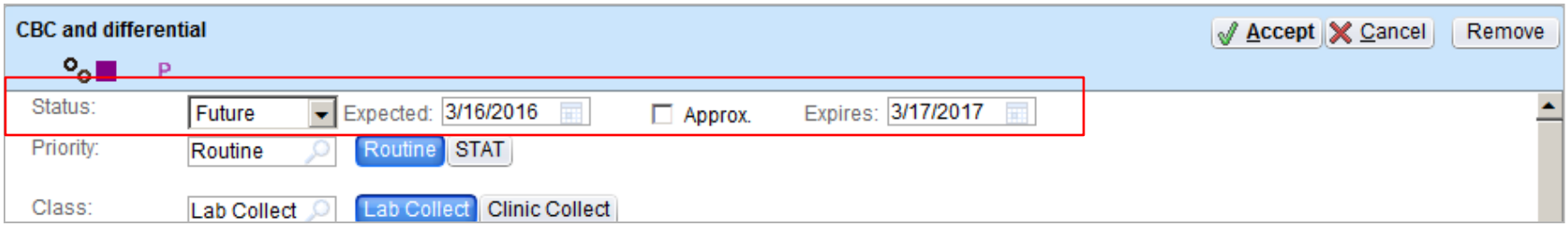
Order Composer: Order Status



- Default **Order Status** = Future
- *99% of time this should not be changed*
- Can set **Expected date** if want patient to be drawn at a certain time in future (defaults to today)
- Other **Order Status** options:
  - **Standing**: e.g. monthly CBC for 10 months
  - **Normal**: When ordered with Normal status, upon ***signing*** the order will be ***released***.
    - Problematic if not ready to collect right now
    - **Only release orders that you are going to collect that day**
    - Normal order status not permitted (hard stop when sign) for orders only encounters

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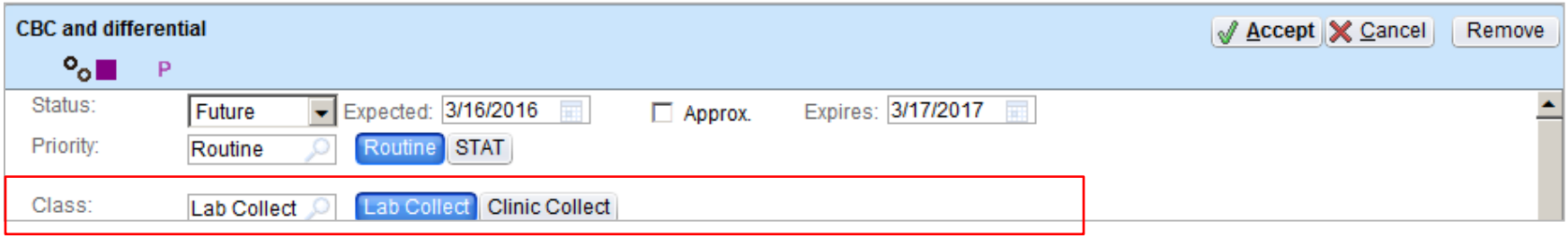
Order Composer: Order Class



- **In Most Cases:**
  - **Lab Collect = Will be collected at lab run draw site (Wang/ACC2, MG West lab, RHC lab, CHC lab)**
  - **Clinic Collect = Will be collected in the Practice. Use for any specimen type (micro or blood) that will be collected within the practice.**
- When saving a lab to a favorites list important to save with appropriate **Order Class for your clinical workflow**
- **Order Class** default = **Lab Collect** for most labs (chem, heme, sendouts)
- **Order Class** default = **Clinic Collect** for microbiology (flu swabs, urine culture, wound culture)

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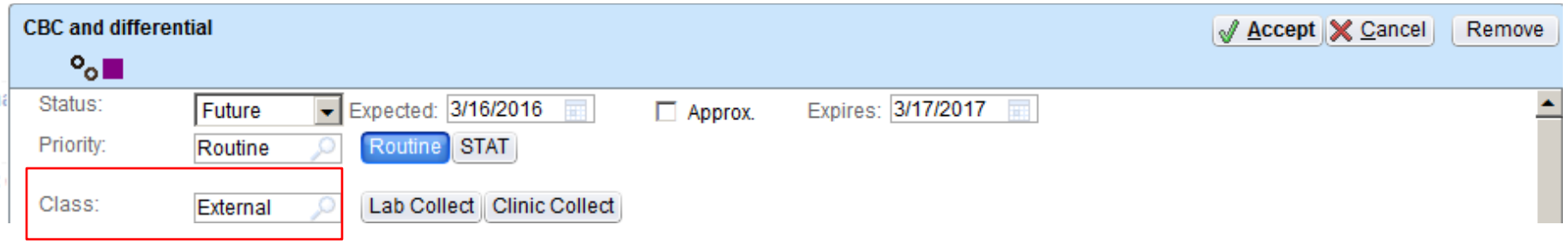
Order Composer: Order Class External



- External used when want to print laser printed **paper requisition to send patient to a lab outside of PHS**
- Setting the **Order Class** OR the **Resulting Agency** to **External** will causes a Paper Requisition to print upon signing the order.
- **CURRENT:** If ordered as **Status = Normal, Class = External** will close out order and cannot be later released. Using Future/External allows order to be released later.
- **FUTURE (week of 4/17):** All External orders will close out order so cannot be released

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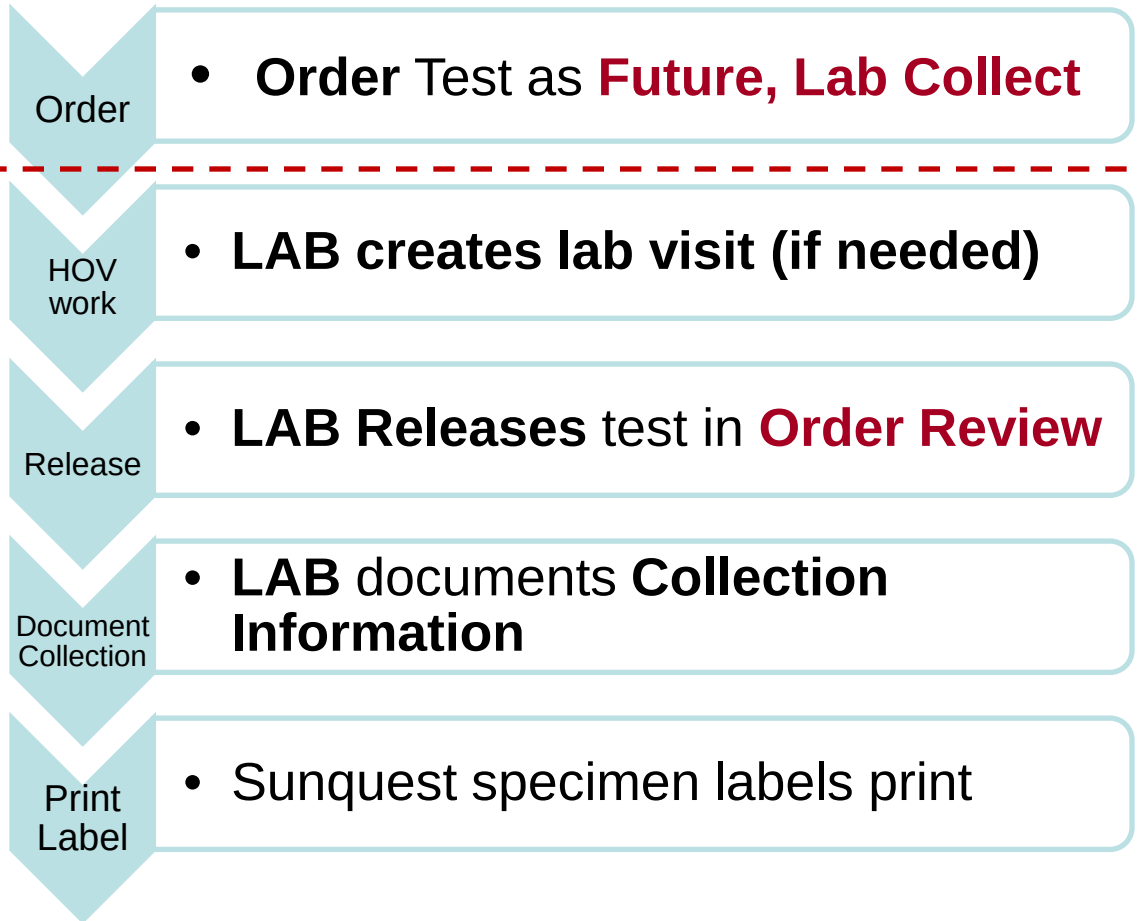
Lab Collect Workflow Overview

- Used in practices that send patients to ACC2/Wang, MG West lab, RHC lab, CHC lab
- **Orders that are not planned to be collected within the practice should be placed as Future, Lab Collect****



** Upon release, Lab will automatically convert all orders to Lab Collect

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Clinic Collect Workflow Overview (Collect same day as visit)

- Used in practices that collect specimens
- **Requires Orders be placed as Clinic Collect** (or released from PCs that convert all orders to Clinic Collect)

Order	• **Order** test within visit as **Clinic Collect**
Release	• **Release** order within visit using **Order Review**
Document Collection	• Use **Visit Orders Report** to **Document Collection Info** (Date/time, who collected)
Print Label	• Sunquest specimen labels print

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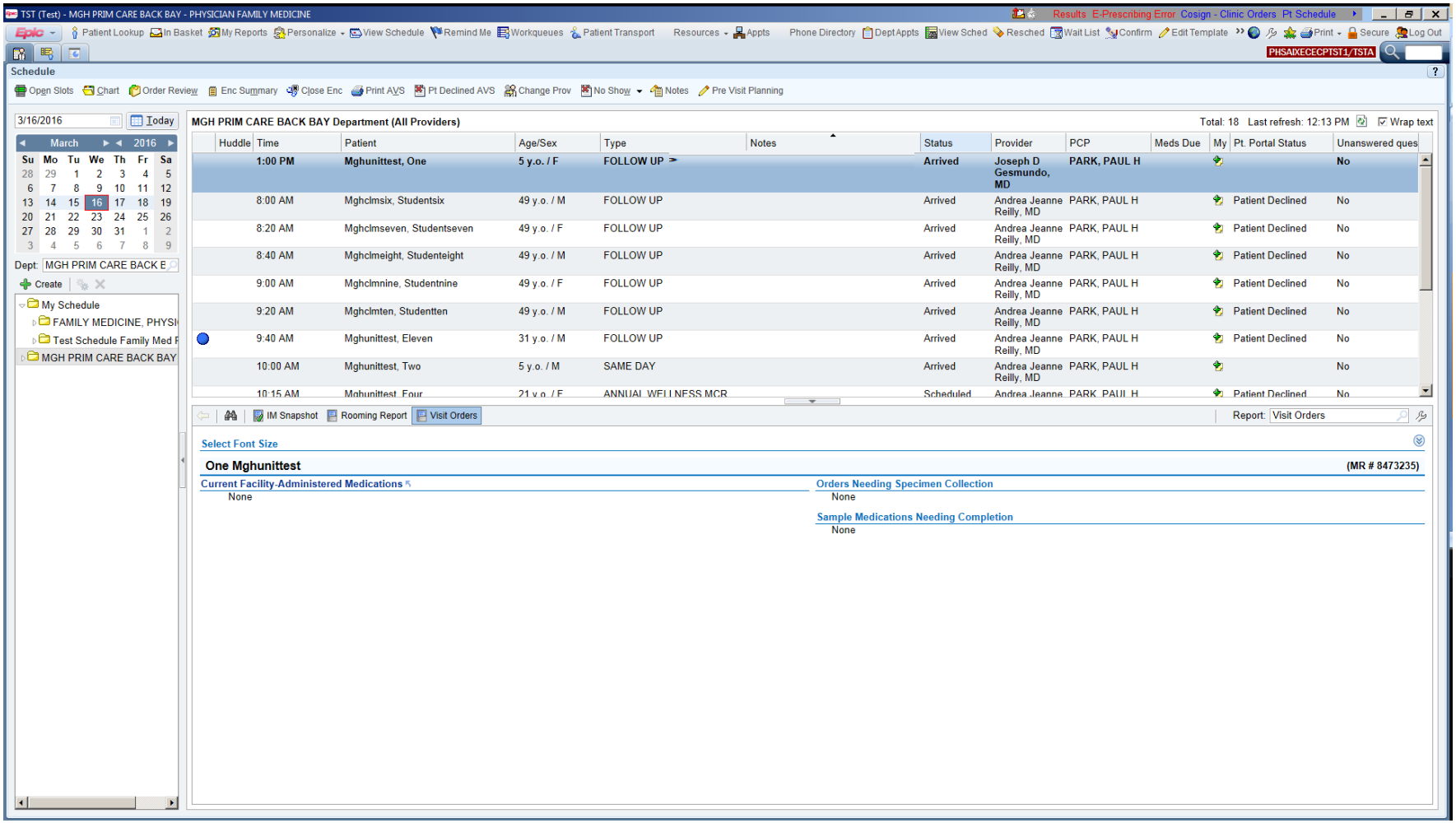
Collecting Specimens During Visit



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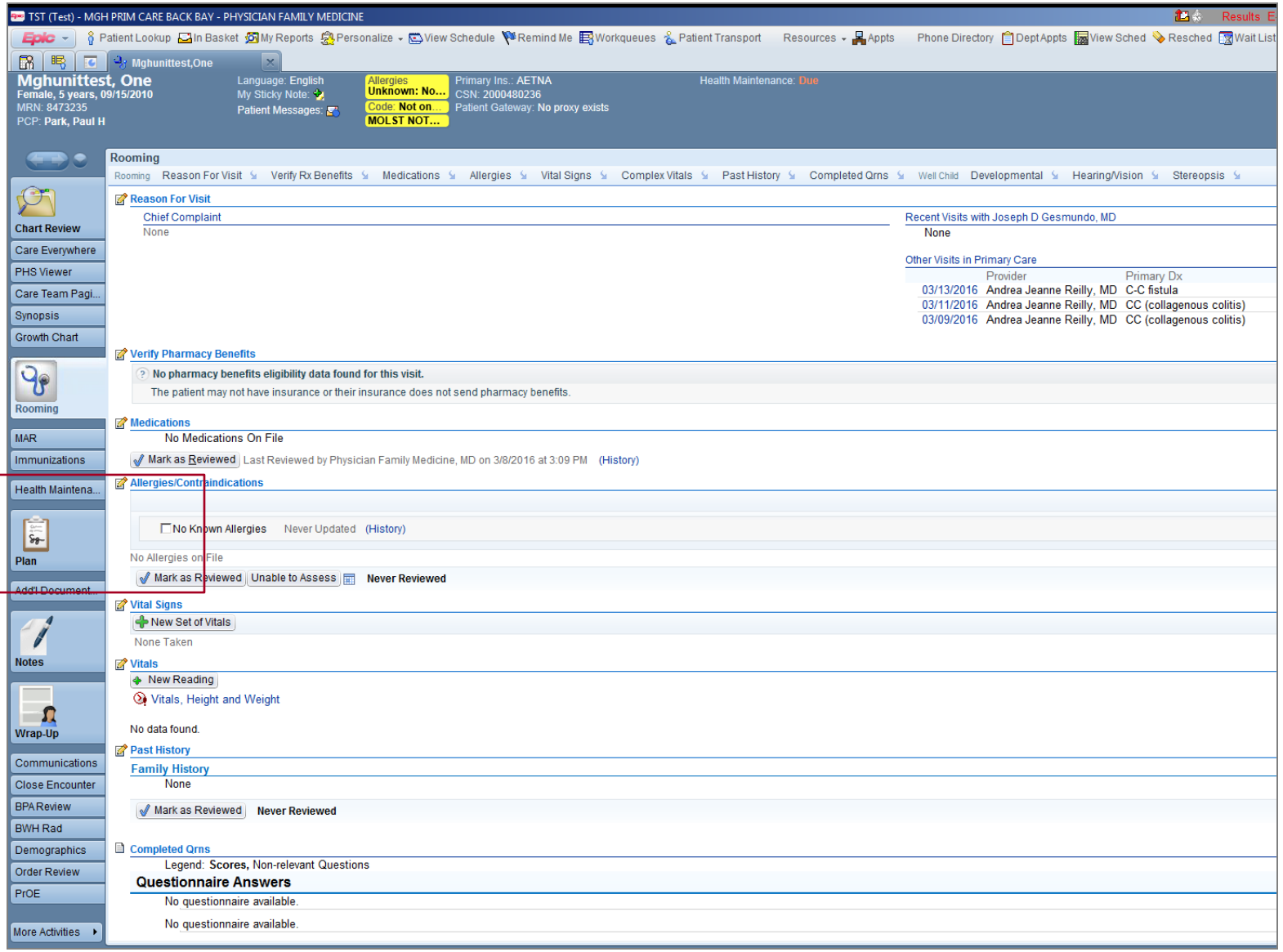
Order Lab Testing



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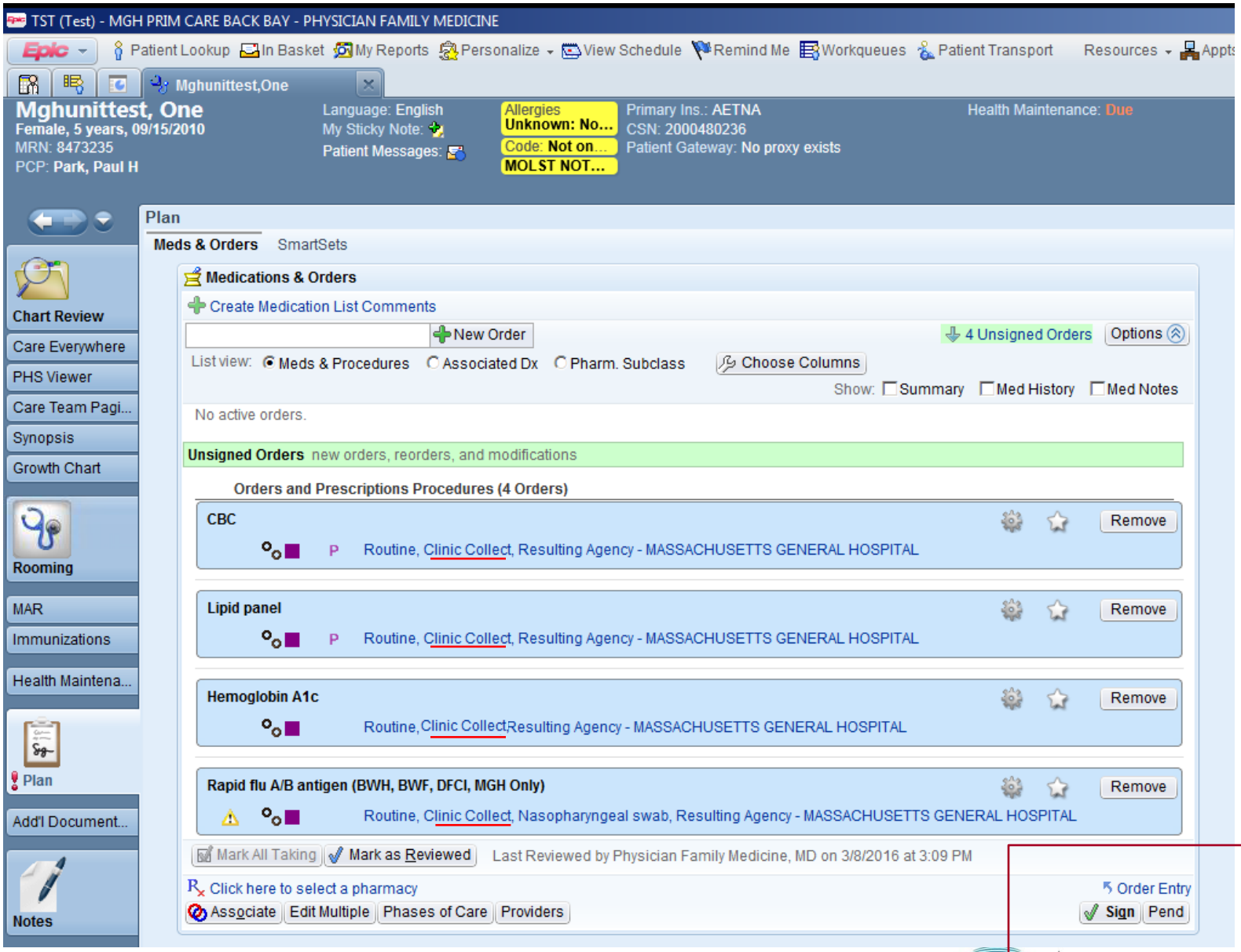
Order Testing as **Clinic Collect**



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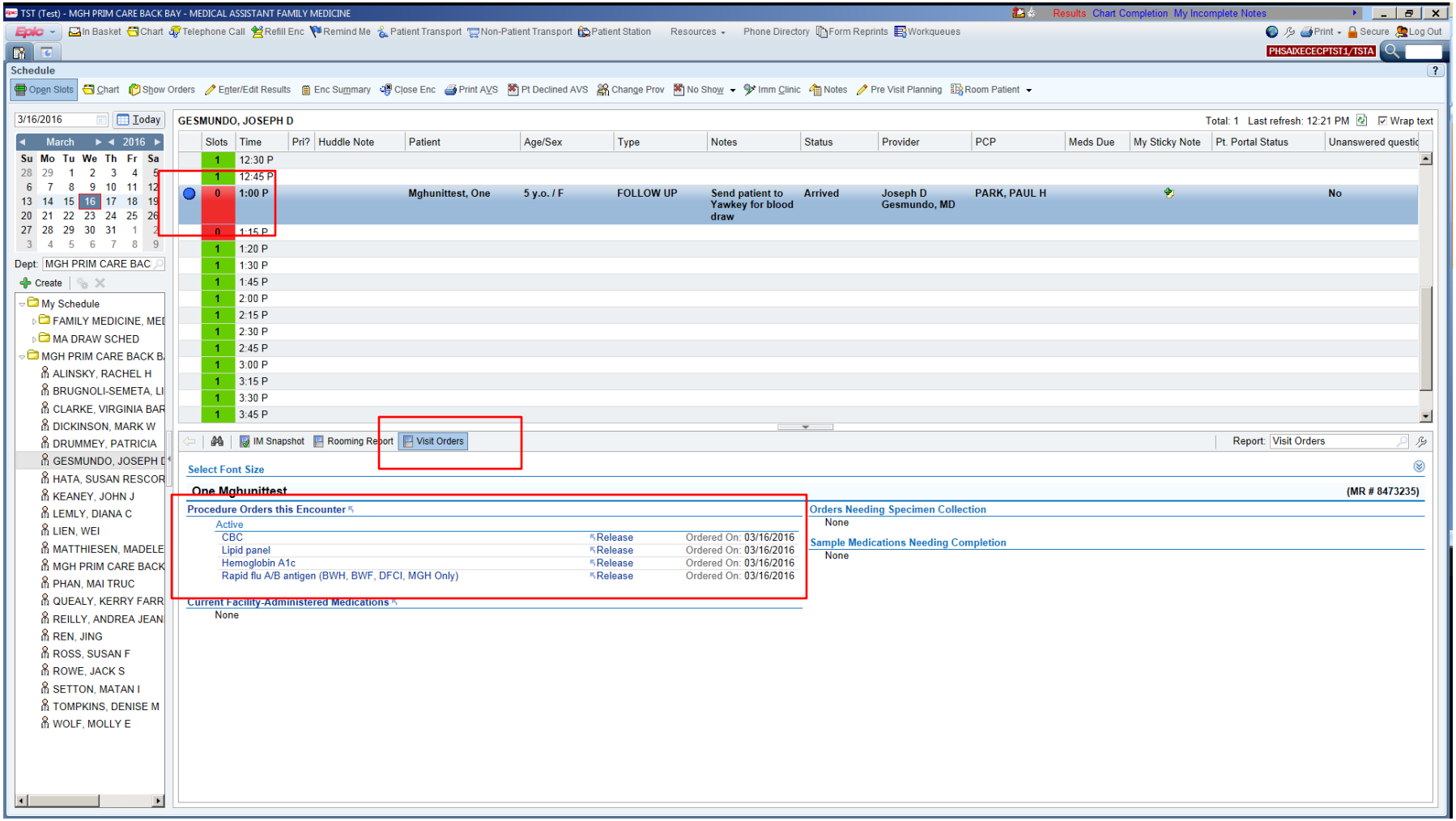
Medical Assistant to Collect Specimen



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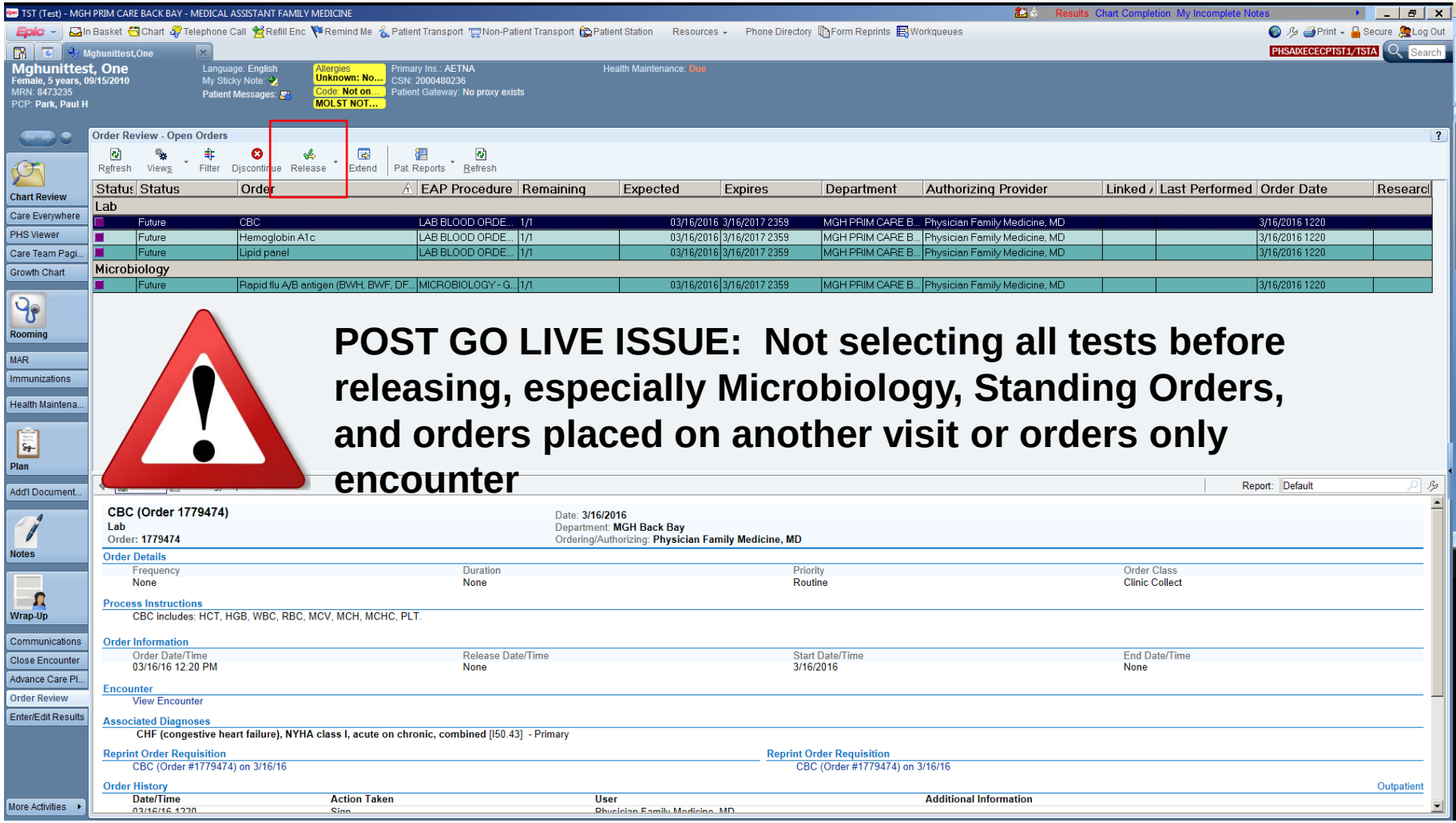
Release Orders Planning to Collect



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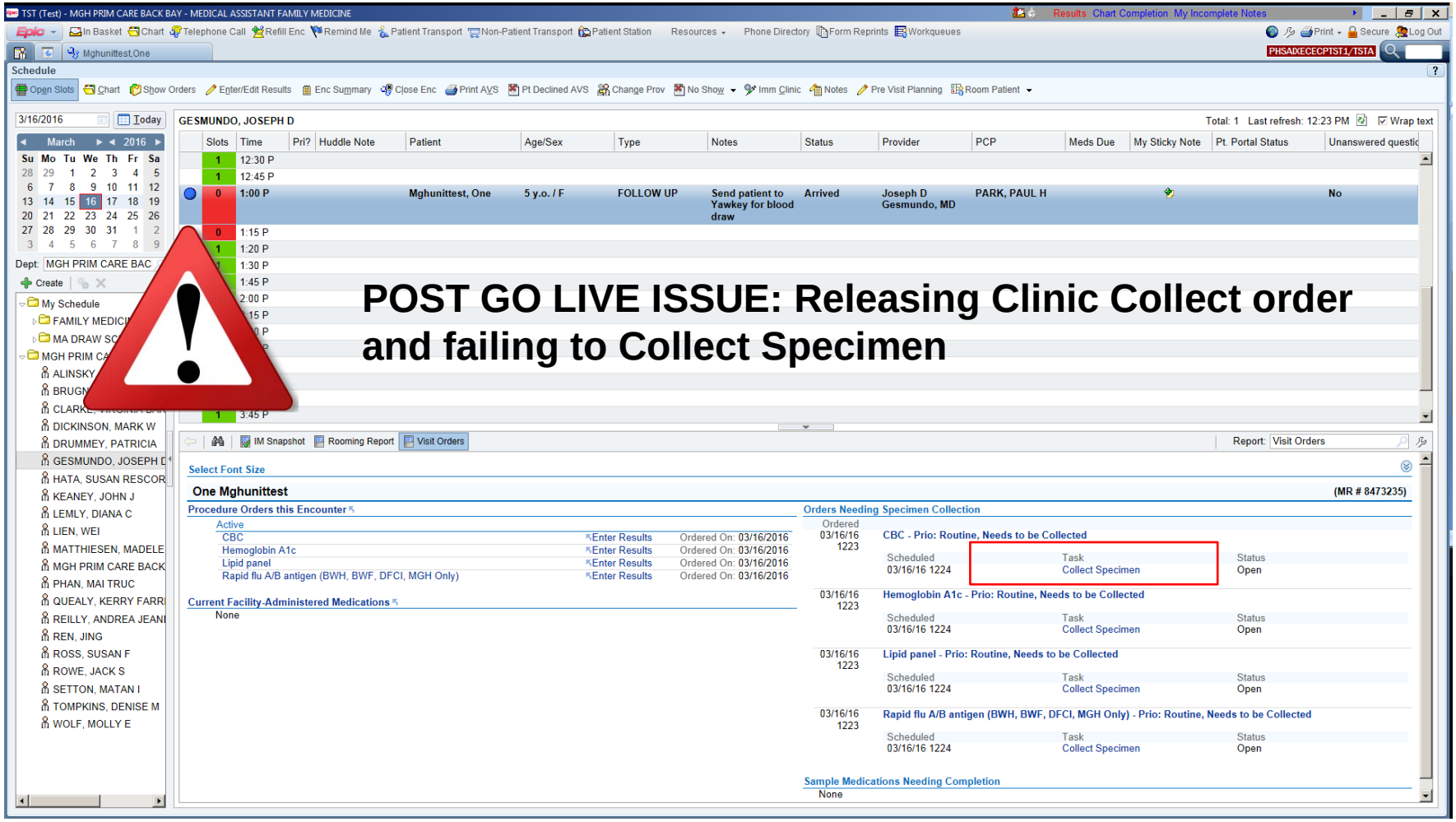
Visit Orders: Collect Specimen Task



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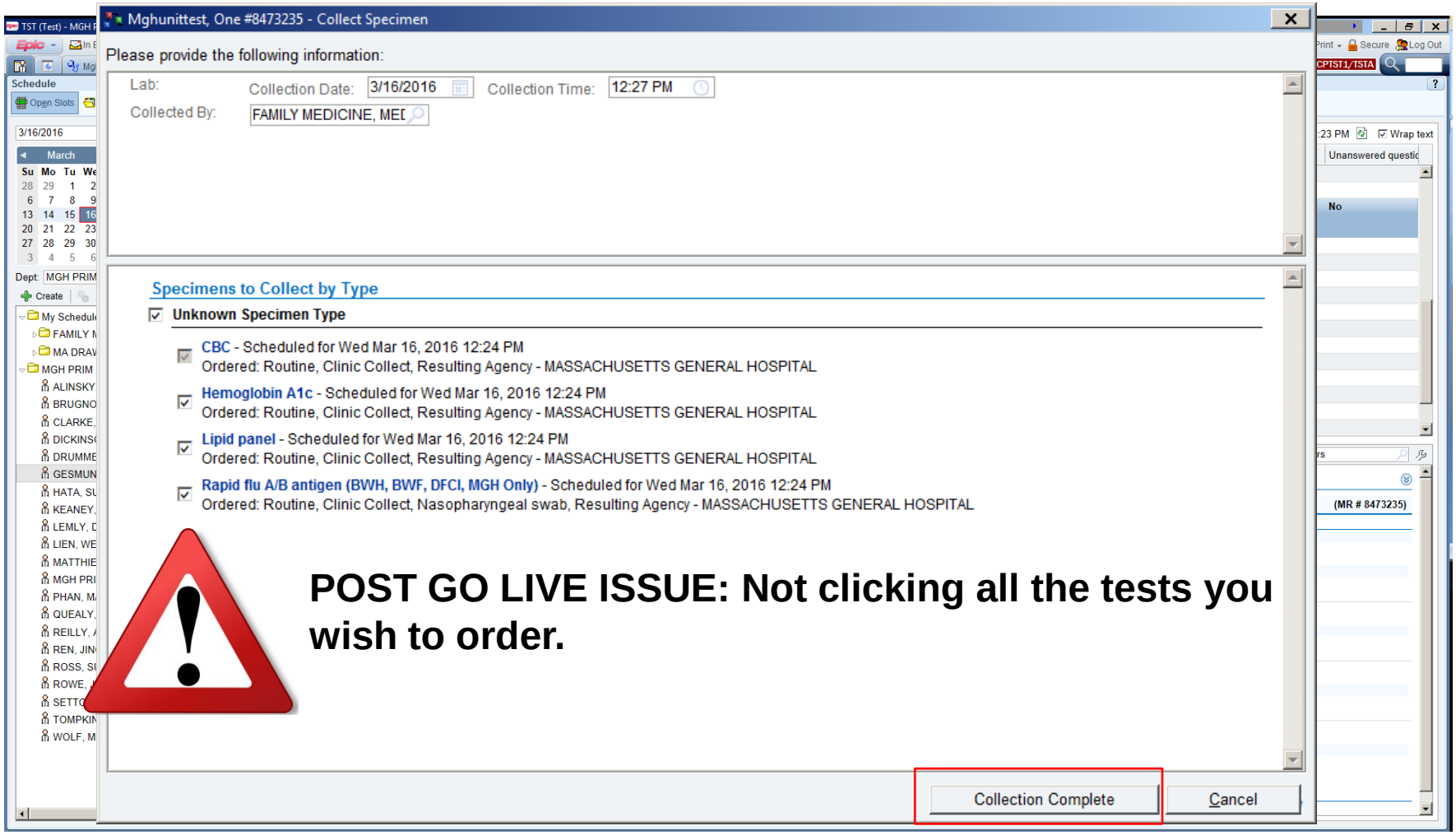
Visit Orders: Collect Specimen Task



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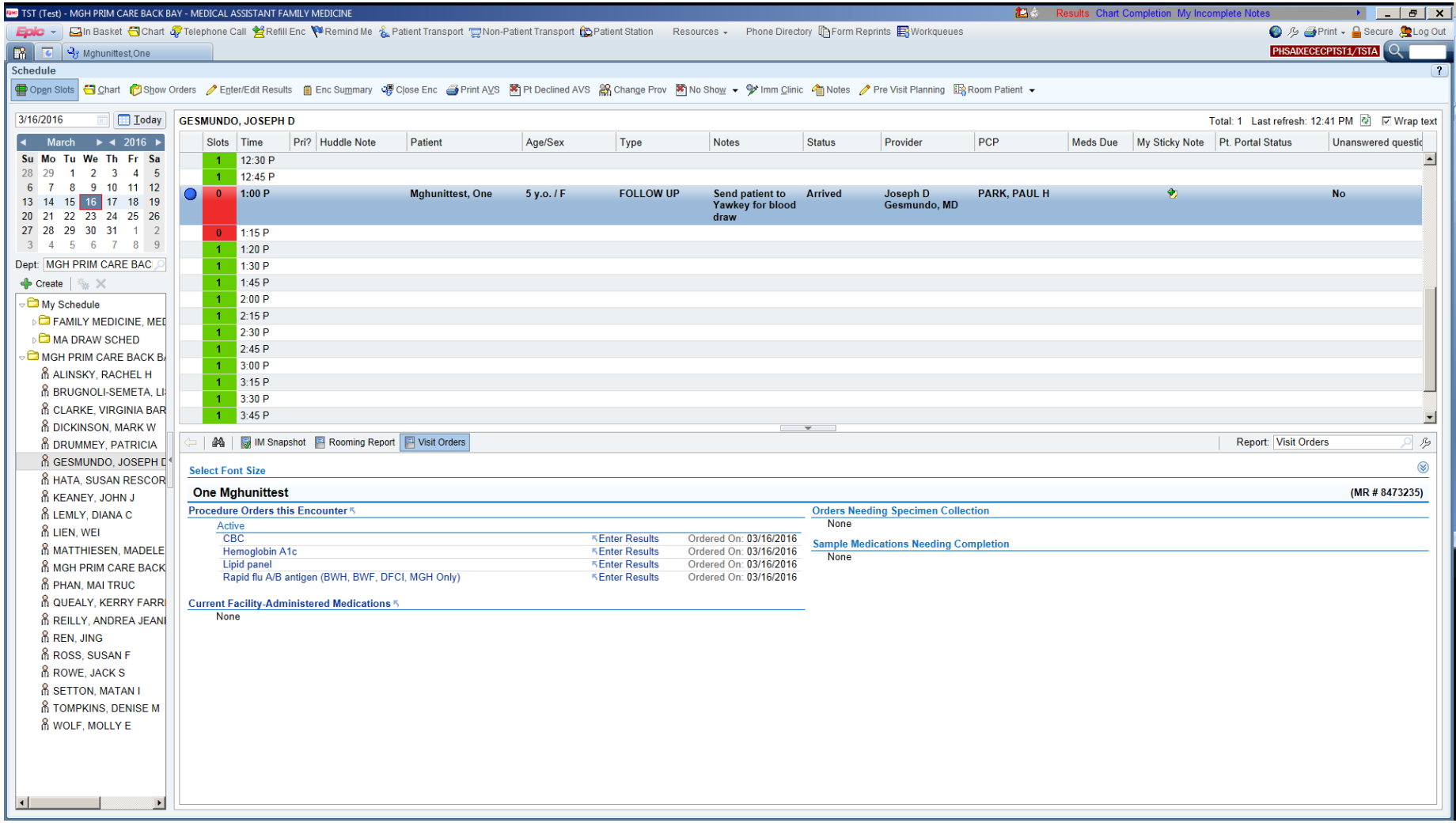
Medical Assistant Schedule



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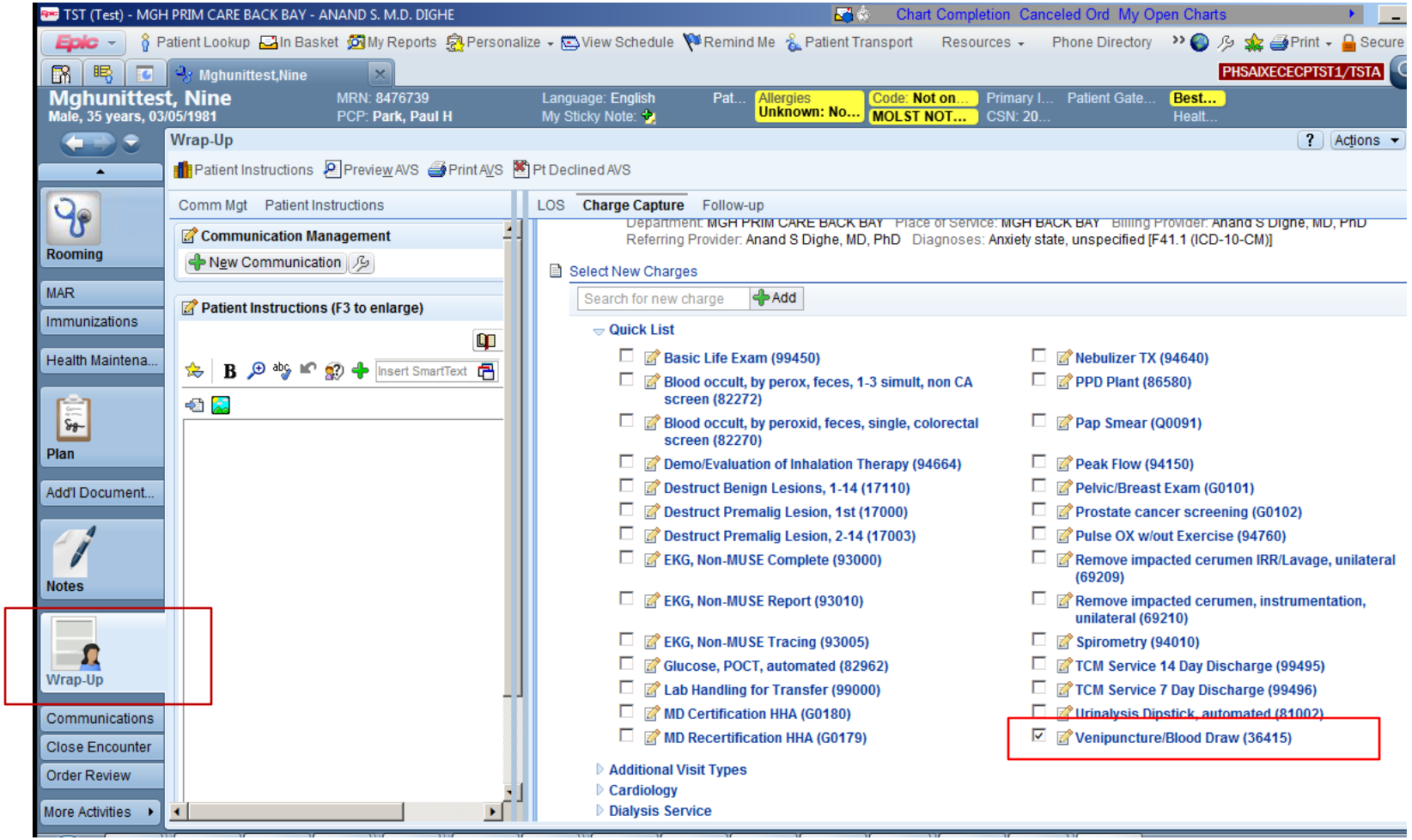
Venipuncture Billing

- Documented in **Wrap-Up**
- Charges post when encounter is closed



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Encounter Types

- **Orders Only** Encounter
  - Providers use **Orders Only Encounters** to enter orders not connected with a visit (i.e. before or after visit)
  - Rule in place that only allows **Future** status orders
  - **Labs should never be released from an Orders Only Encounter** (CSN is not valid for billing, does not pass to lab systems).
- **Provider Visit**
  - Labs ordered as **Clinic Collect** released during a provider visit will appear on the **Visit Orders Report** and will be available to document Collection Date/Time and who collected
- **Walk in** Appointment (blood draw)
  - Used for **specimen collection on different day than visit**
  - Labs ordered as **Clinic Collect** released during Walk In visit will appear on the **Visit Orders Report**
  - When scheduling the Walk In appointment can link the orders which will cause the orders to **Release** upon **Check In**

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Clinic Collect (collected on different day than ordered)

Order
- **Order** Test as **Clinic Collect**

Create Encounter
- If Order was placed earlier (from orders only, prior visit, standing order, etc) a **Visit MUST be created** to release the order from. (**Provider Visit or Walk In**)

Release
- From within the new encounter **Release** orders in **Order Review**

Document Collection
- Use **Visit Orders Report** to **Document Collection Info** (Date/Time, who collected)

Print Label
- Sunquest specimen labels print

Wrap-Up
- If blood drawn use **Wrap-Up** to document venipuncture charge

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KEY POINTS: Specimen Collection Within the Practice

- Order must be **Clinic Collect**
- **Order release** MUST occur in the context of a valid encounter
  - Today's provider visit
  - Walk in blood draw visit
  - **NOT** an "Orders Only" encounter
- Order release should only be done when you are going to be collecting specimen
- Order release will NOT print labels for Clinic Collect orders
- Must complete **Collect Specimen task** to Print Labels

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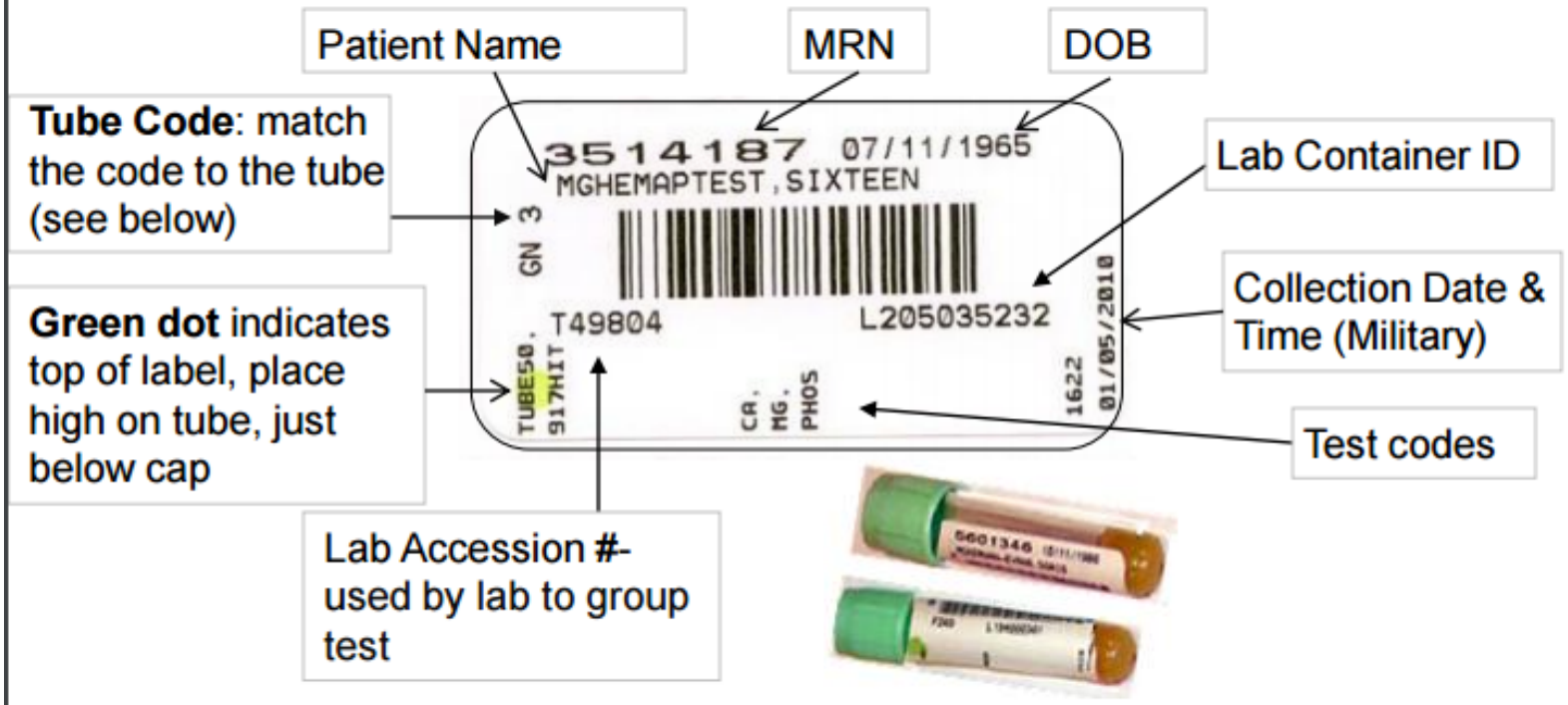
April 6, 2016

Tube Code Crosswalk and Label Information

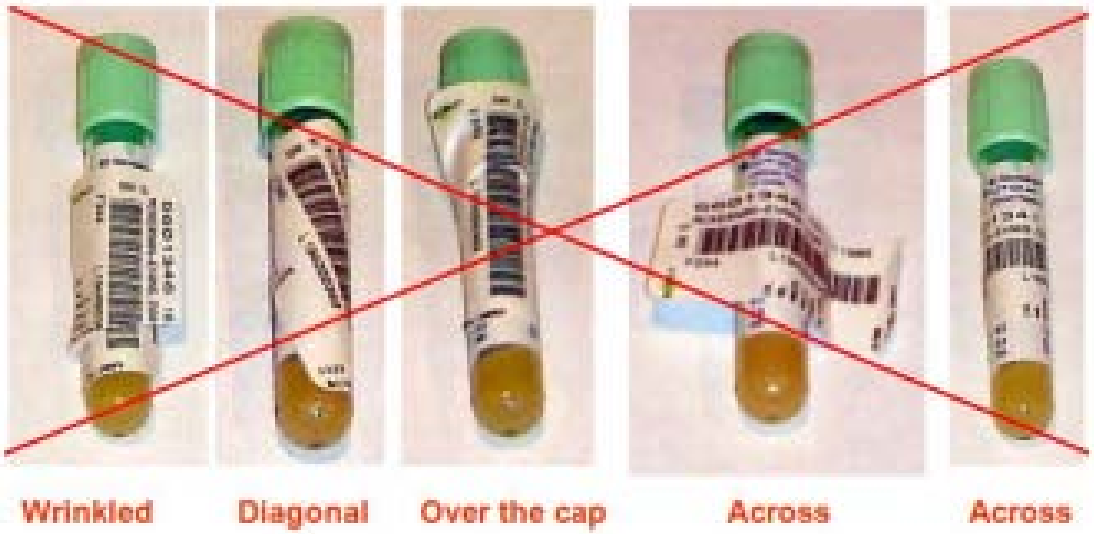


TUBE CODE	TUBE TYPE
B 3	3 ml Blue
B 3 I	3 ml Blue on ICE
FLD	Fluid
GD 5	5 ml Gold

TUBE CODE	TUBE TYPE
P10	10 ml Purple
P10 I	10 ml Purple on ICE
P 3	3 ml Purple
P 3 I	3 ml Purple on ICE

Labeling

- Position label straight up and down on tube
- Green dot up
- **Place top edge of label close to cap**



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Printing from Epic

- Labels print with header label
- Container label used to label tube
- Container label indicates Collection Time (time label was printed)
- **NO need to write collect date/time on bag if collected within 15 minutes of label print time.**

Container Label **Header Label**

MASSACHUSETTS GENERAL HOSPITAL

PATHOLOGY SERVICE

USE THIS BAG FOR ALL SPECIMENS EXCEPT MICRO

Date Collected _____ /_____

Time Collected _____ AM PM

1. Place specimen(s) in zip-lock compartment.
2. Seal by sliding your thumb and forefinger across the zipper.
3. Recheck zip-lock for proper closure.
4. When using a requisition , fold and insert into outside pocket.

84498 (7/07)

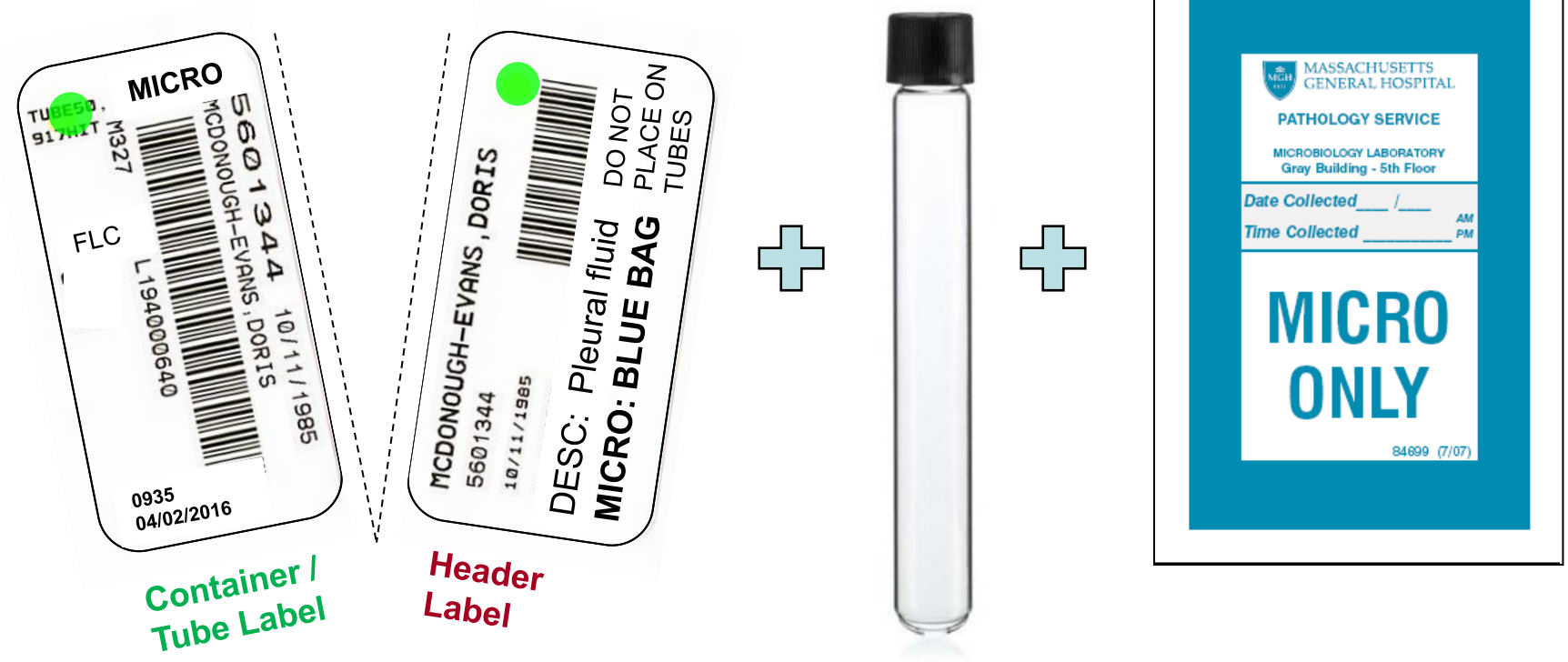
Header Labels:

- Do not place on tubes
- Text will vary depending on test
- Watch for special instructions
- Contains patient information (confidential waste)

Microbiology Testing

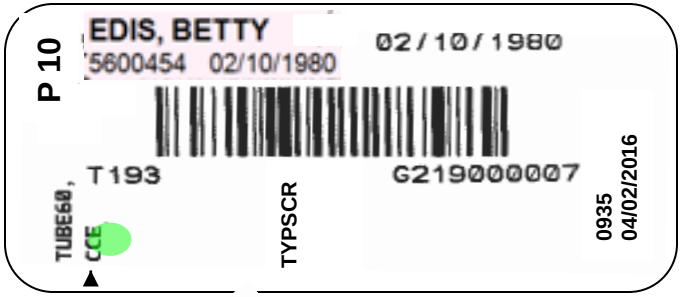
- Header label indicates to put microbiology sample in **blue microbiology bag**
- Header label provides source and specimen description information as entered by provider (e.g. Pleural fluid)
- Header label should be thrown out after specimen labeled with container label

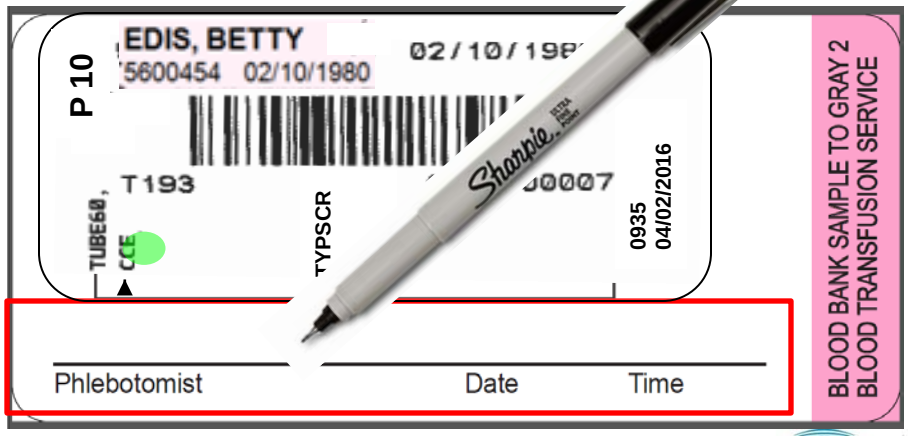
Container Label **Header Label**



Blood bank specimen labeling

- Signature still **REQUIRED**
- Will use new base label where lab label will be affixed
- Write on base label, not Sunquest label
- No paper requisition needs to accompany specimen

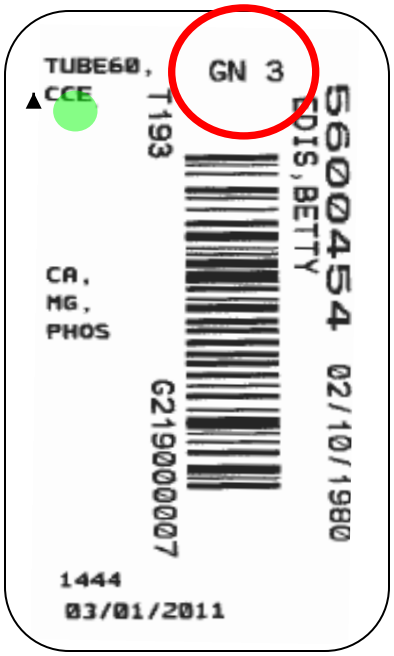




Pediatric Tube Labeling

MASSACHUSETTS GENERAL HOSPITAL PATHOLOGY

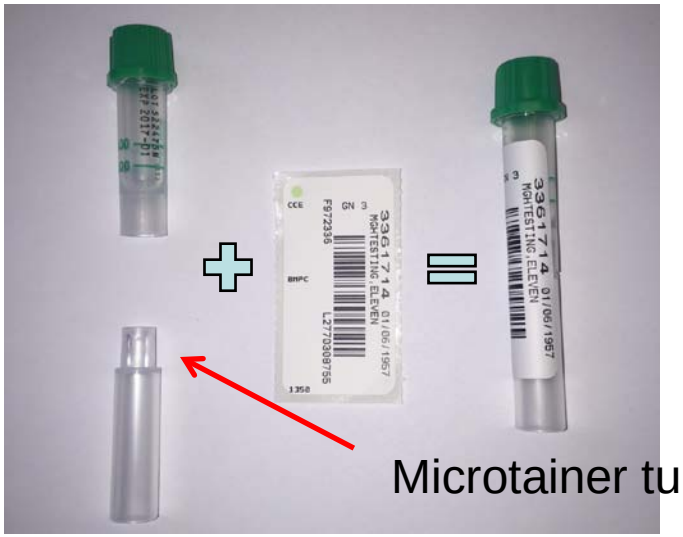
Advancing Diagnosis and Discovery



Epic Requisition Tube Codes and Pediatric Crosswalk (rev.12/5/2015)

REQ LABEL TUBE CODE	TUBE TYPE
B 3	3 ml Blue
B 3 I	3 ml Blue on ICE
GD 5	5 ml Gold
GD 5 I	5 ml Gold on ICE
GD 5 F	5 ml Gold in FOIL
GN 10	10 ml Green
GN 3	3 ml Green
GN 3 I	3 ml Green on ICE
GY 2	2 ml Gray

CORRESPONDING PEDIATRIC/MICROTAINER TUBE	
	1.8 ml Blue
	Red microtainer
	Green microtainer



Microtainer tube extender

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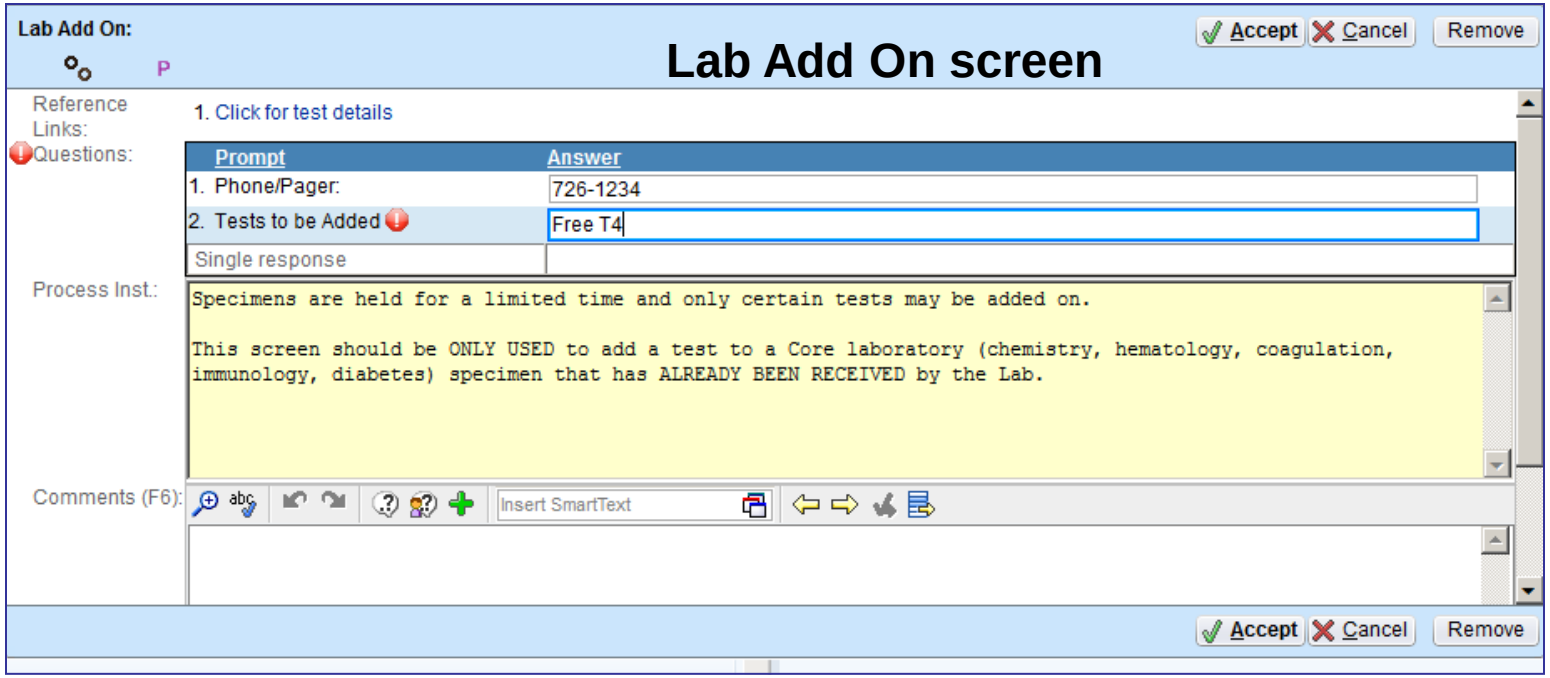
Add On Testing



- Order in Epic similar to any other lab order
- Three lab add on orders:
  - Lab Add On, Microbiology Add On, Blood bank Add On
- Order requires entry of **contact information** and **tests requested**
- On sign, the order is sent to lab system and also prints at a designated laser printer in the appropriate lab
- If lab cannot perform add on ordering provider will be contacted

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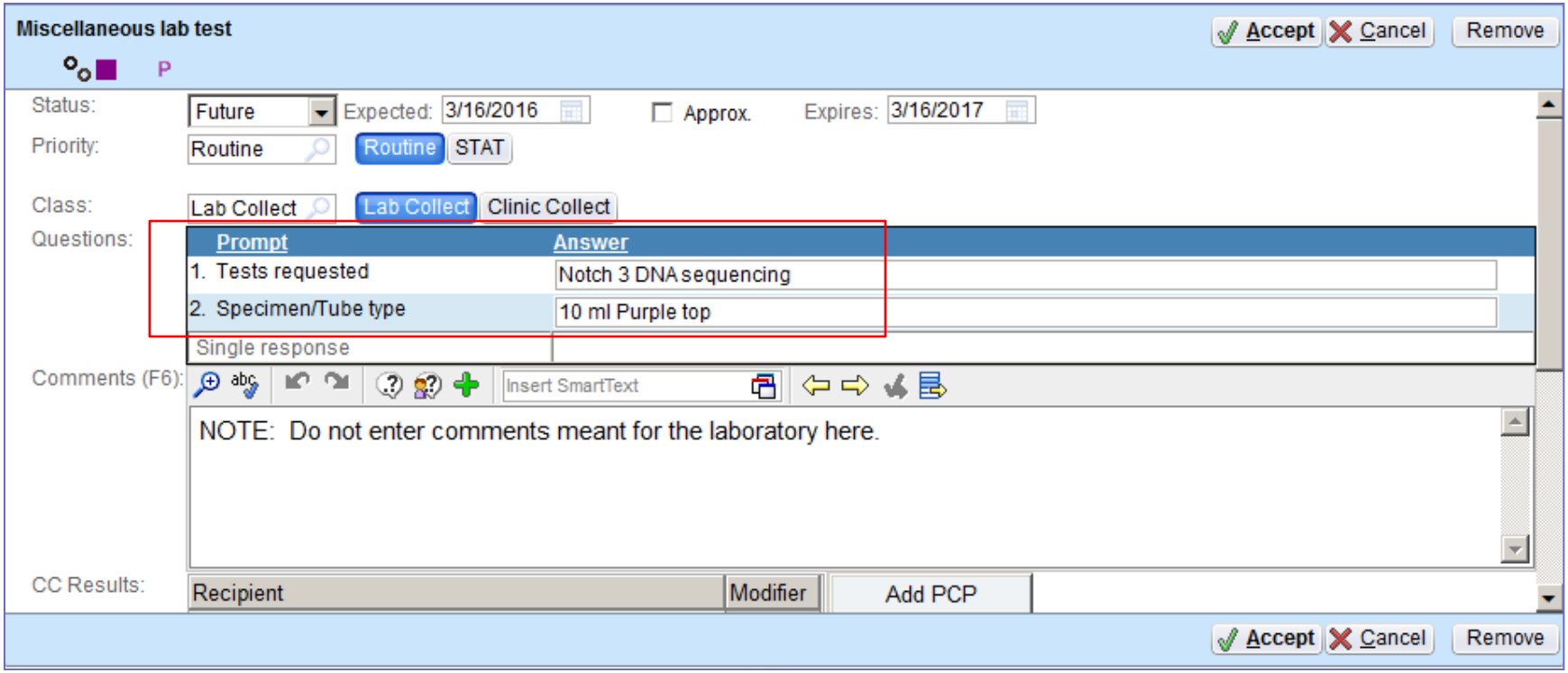
Miscellaneous Test Workflow



- Most inpatient tests will be on facility list (1,600 orders)
- Two orders: **Miscellaneous Lab Test** (Core lab, including sendouts) and **Miscellaneous Micro Test**
- Need to enter **Tests requested** and **Tube type**
- Will generate single label with **MISC** as the tube type

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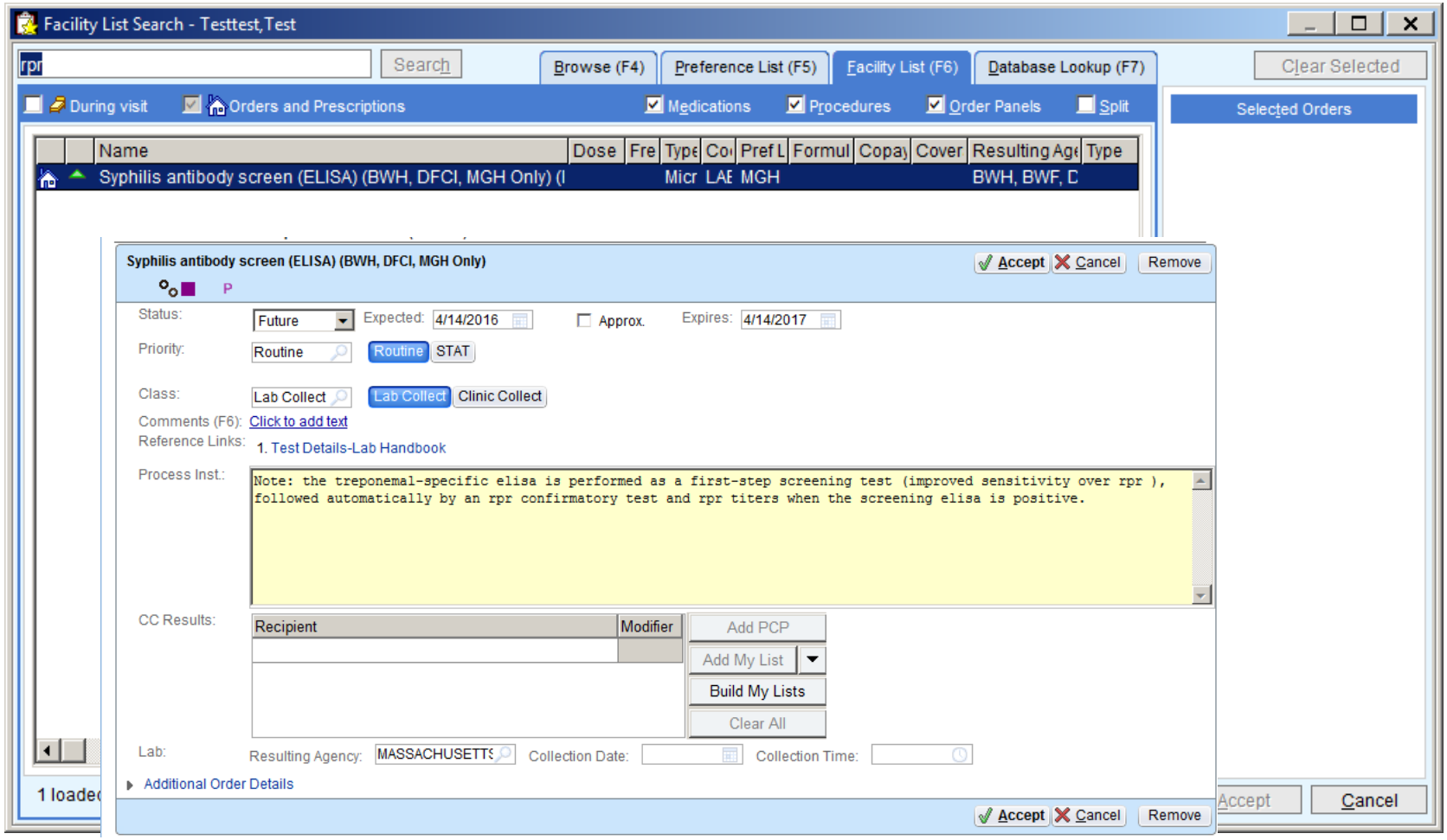
The Importance of the Facility List



- 1,600 tests on MGH menu, add-on tests, Miscellaneous test
- Defaults in MASSACHUSETTS GENERAL as resulting agency

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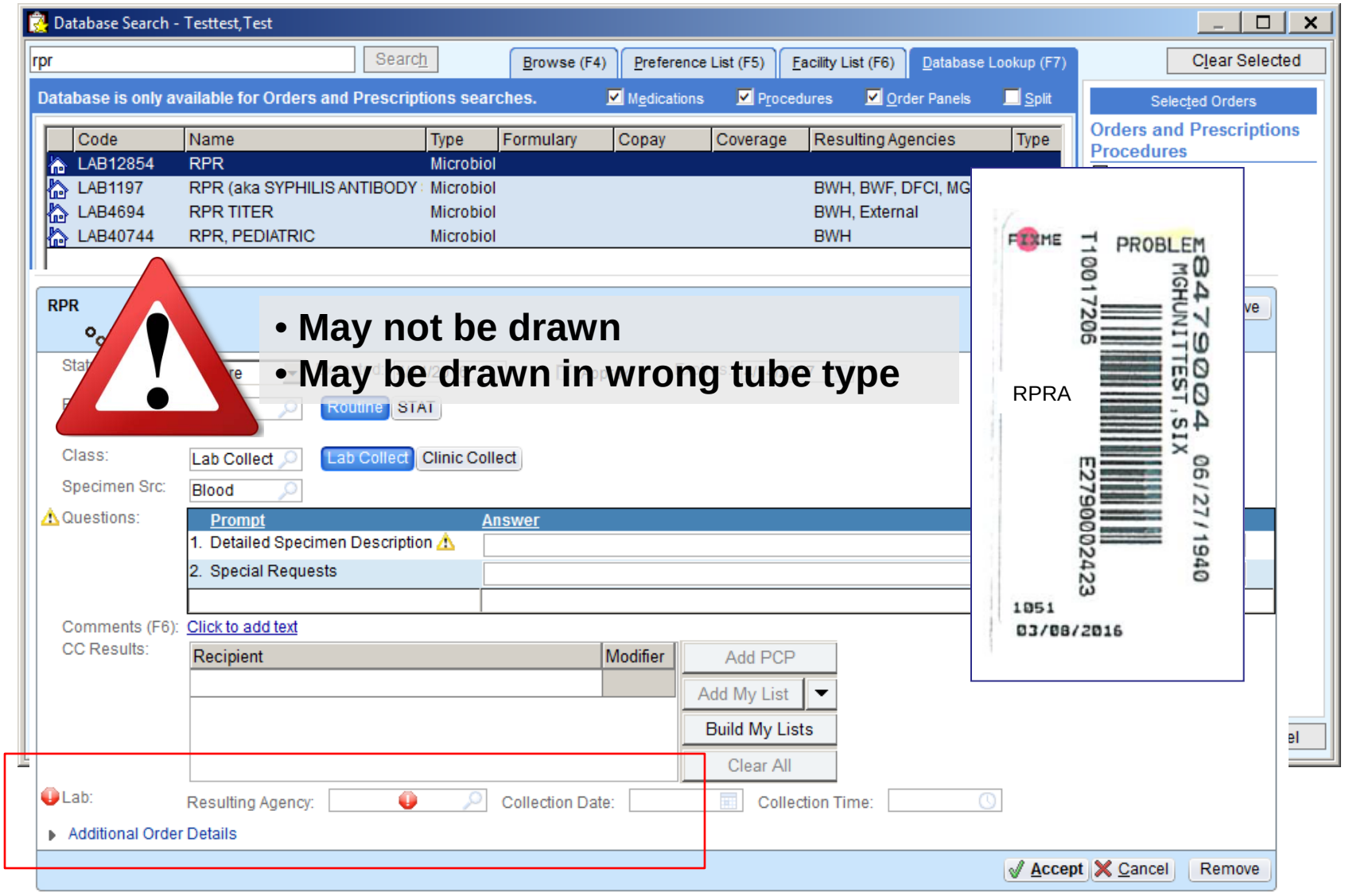
The Perils of Database Lookup



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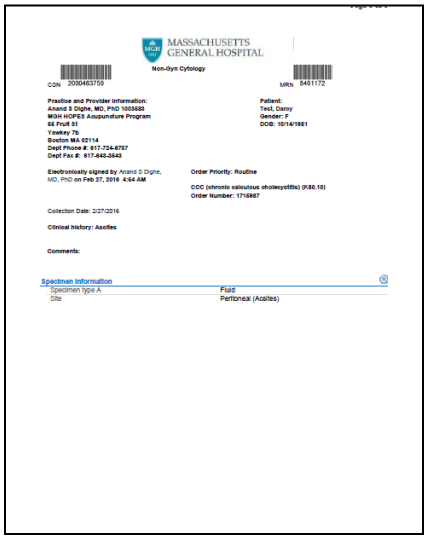
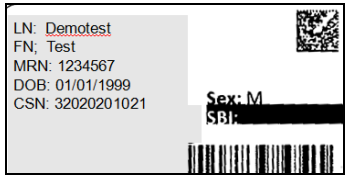
Anatomic Pathology

- Searched for in Epic similar to lab tests
- **8 different orders** (e.g. anatomic pathology, pap smear, non-GYN cytology, dermatopathology, flow cytometry)
- Upon release, requisition will print to laser printer associated with PC
- **Specimen containers labeled with ADT labels**
- Send laser printed requisition plus ADT labeled container to pathology lab in **clear bag**



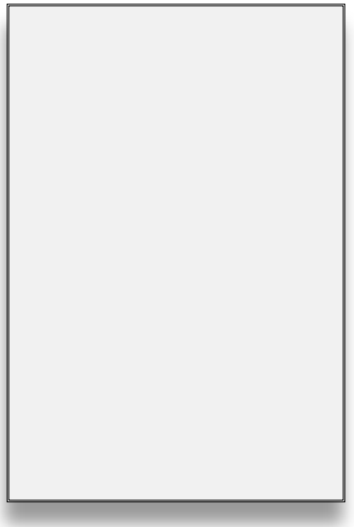


ADT label

Clear bag

Comments to the Laboratory

- Comments to the laboratory can be entered during the Epic ordering process using the comment field of the order details screen
- **Rarely**, comments may need to be entered at the time of collection. For these comments affix a Header label or ADT label to a blank piece of paper and write the comment on the paper. Send to lab along with tube in specimen bag



MASSACHUSETTS GENERAL HOSPITAL

PATHOLOGY SERVICE

USE THIS BAG FOR ALL SPECIMENS EXCEPT MICRO

Date Collected _____ / _____

Time Collected _____ AM PM

1. Place specimen(s) in zip-lock compartment.
2. Seal by sliding your thumb and forefinger across the zipper.
3. Recheck zip-lock for proper closure.
4. When using a requisition , fold and insert into outside pocket.

84498 (7/07)

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Transport Labels

EPIC *e*Care - Labels Required For Transport

APRIL 2, 2016 – EPIC Go-Live

- No colored requisitions for Surgical Specimens (biopsy/tissue specimens)
- No requisitions for Clinical specimens (Core, Blood Bank and Micro Labs)
- Please use these two labels on transport bags for correct delivery of specimens
- Exception – Label not needed for sending to Blood Bank via Pneumatic Tube System

Blood Bank & HLA Specimens

Surgical Pathology Specimens

Specimen Transport Bag Label

Place A Sticker on Each Specimen Transport Bag For Specimen Pick-up

BLOOD TRANSFUSION SERVICE GRAY/JACKSON 2

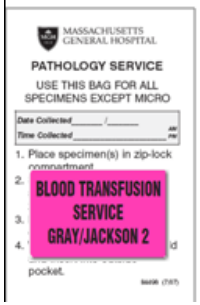
Order: Owens & Minor (O&M)
PS# 490913

Locations supplied by MGH materials management will automatically receive these labels the week of April 11,2016.

ALL others must place an order with O&M

SURG PATH BLAKE 3

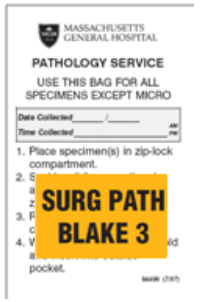
Order: Owens & Minor (O&M)
PS# 491839



Supply/Stocking questions contact:
Maria Cardoso, mpcardoso@partners.org, x6-4331

Technical questions contact:
Laura Listro, llistro@partners.org, x6-0690

Rev. 4-12-2016



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Issues: Unable to Draw All Tubes

- If unable to draw all tubes of an accession (group of tubes with common header label) ONLY send the tubes that were drawn
- **Do not send "extra labels" in bag**
- In some instances the tests from the label that was not sent may be able to be performed on the tubes that were received. If this is not possible, tests that were not able to be drawn on that accession will be credited.

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Point of Care Testing

- Once a POC test is ordered, Enter/Edit Results can be used to document test results if the test is manually resulted

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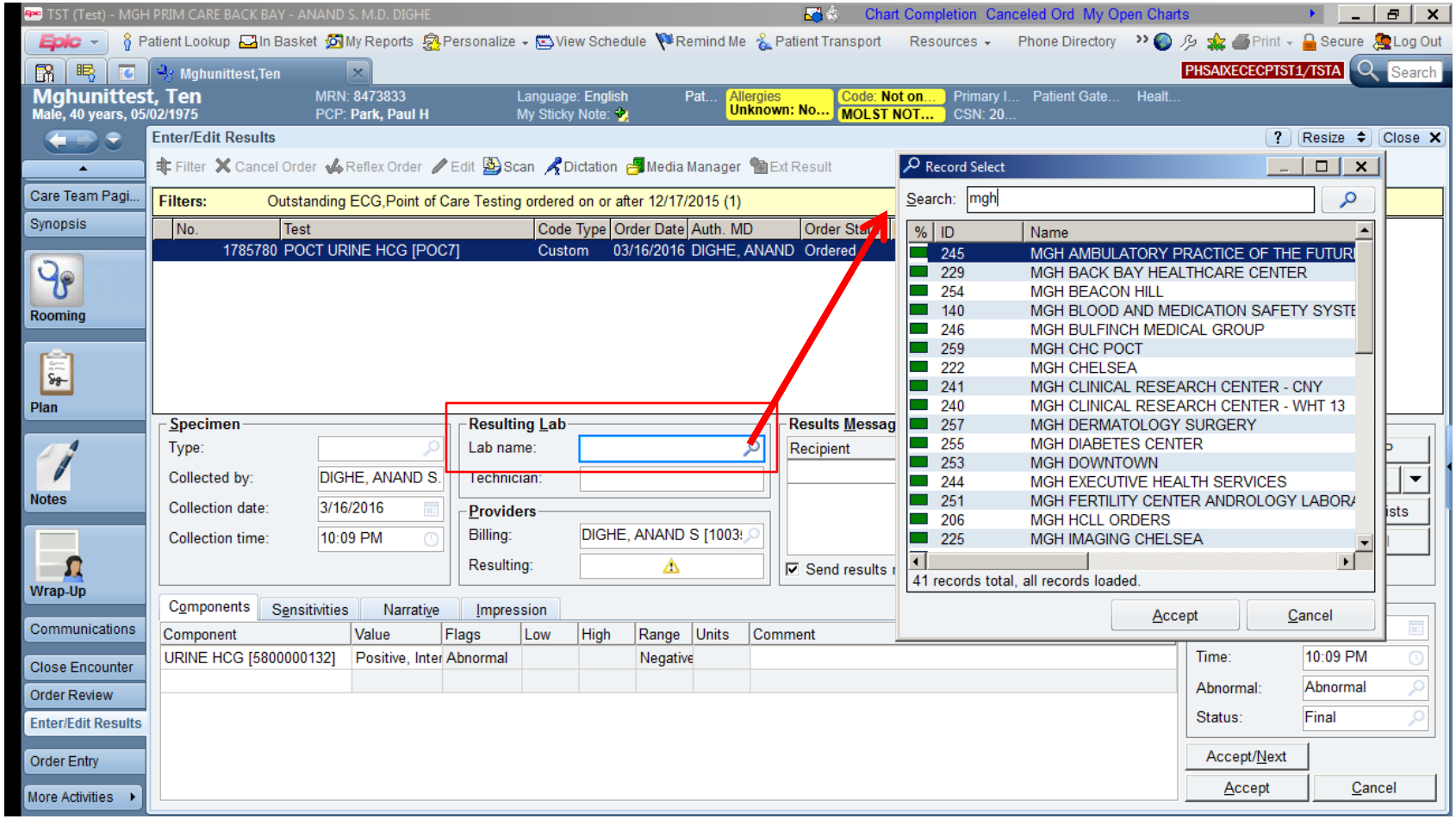
Point of Care Enter/Edit Results



- **Resulting lab** (i.e. where testing performed) is a regulatory requirement
- **Resulting lab = Lab as Defined on your POC testing certificate (CLIA)**
- Once you enter it once you can just type = in field for future patients

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Resources for go live

- MGH Lab Handbook http://mghlabtest.partners.org/EPIC.htm
- Epic Dashboard Learning Home

APPENDIX:
1) LINKING ORDERS TO VISITS
2) ORDER TRANSMITTAL LOGIC

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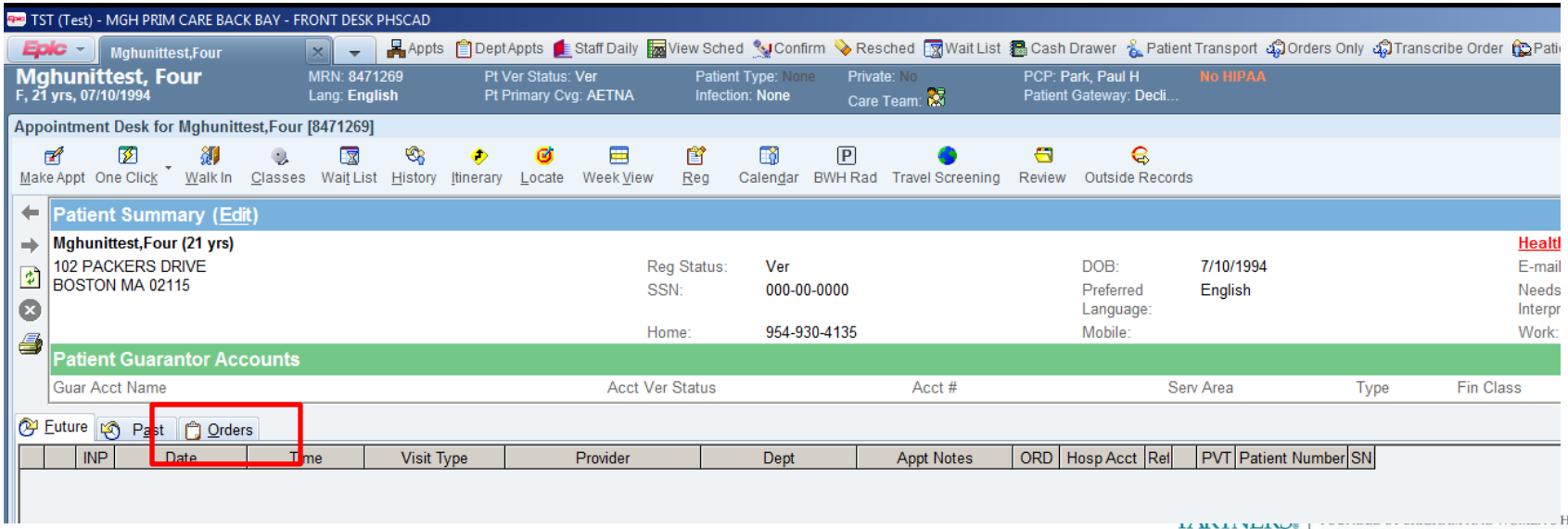
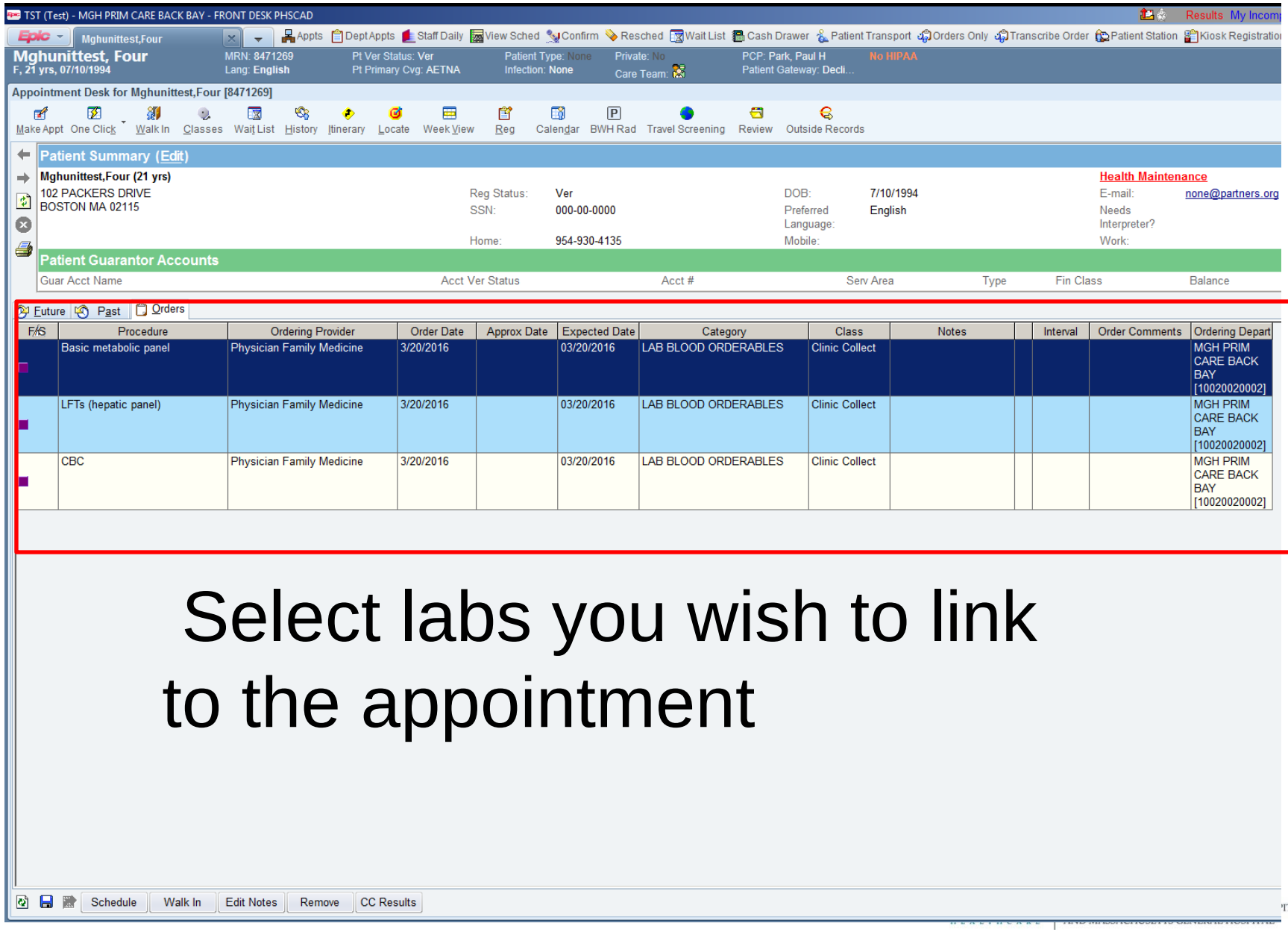
Linking Orders to Appointments

- When scheduling an appointment (office visit or walk in blood draw) you can link lab orders to the appointment
- Linked orders will be released upon Check In (arrival) of the patient for the appointment
- Example: patient has orders previously written for CBC, BMP, and LFTs and we want these to release when patient checks in for their Walk In appointment for a Blood Draw

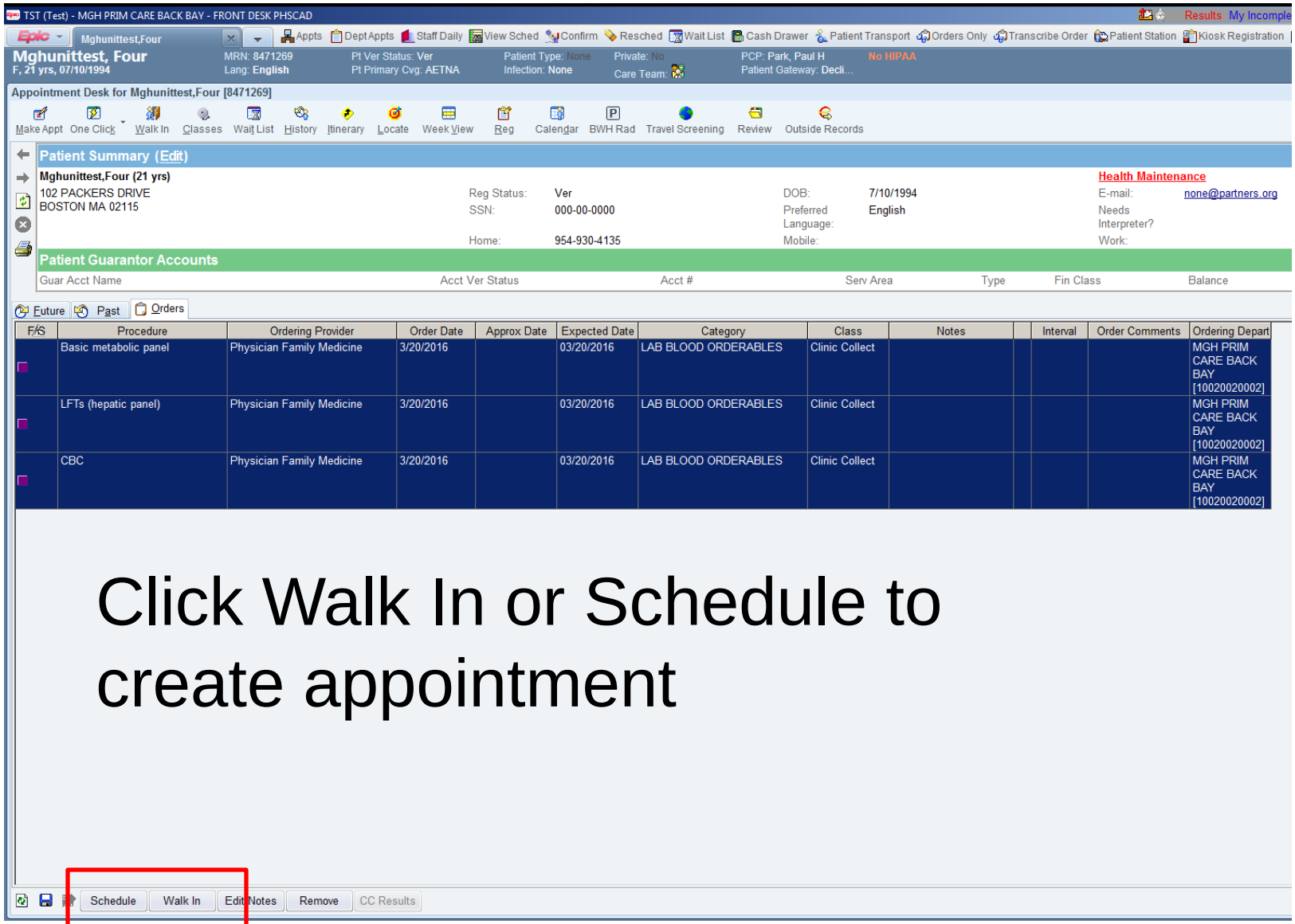


Linking Orders to Appointments



Select labs you wish to link to the appointment

Linking Orders to Appointments



Click Walk In or Schedule to create appointment

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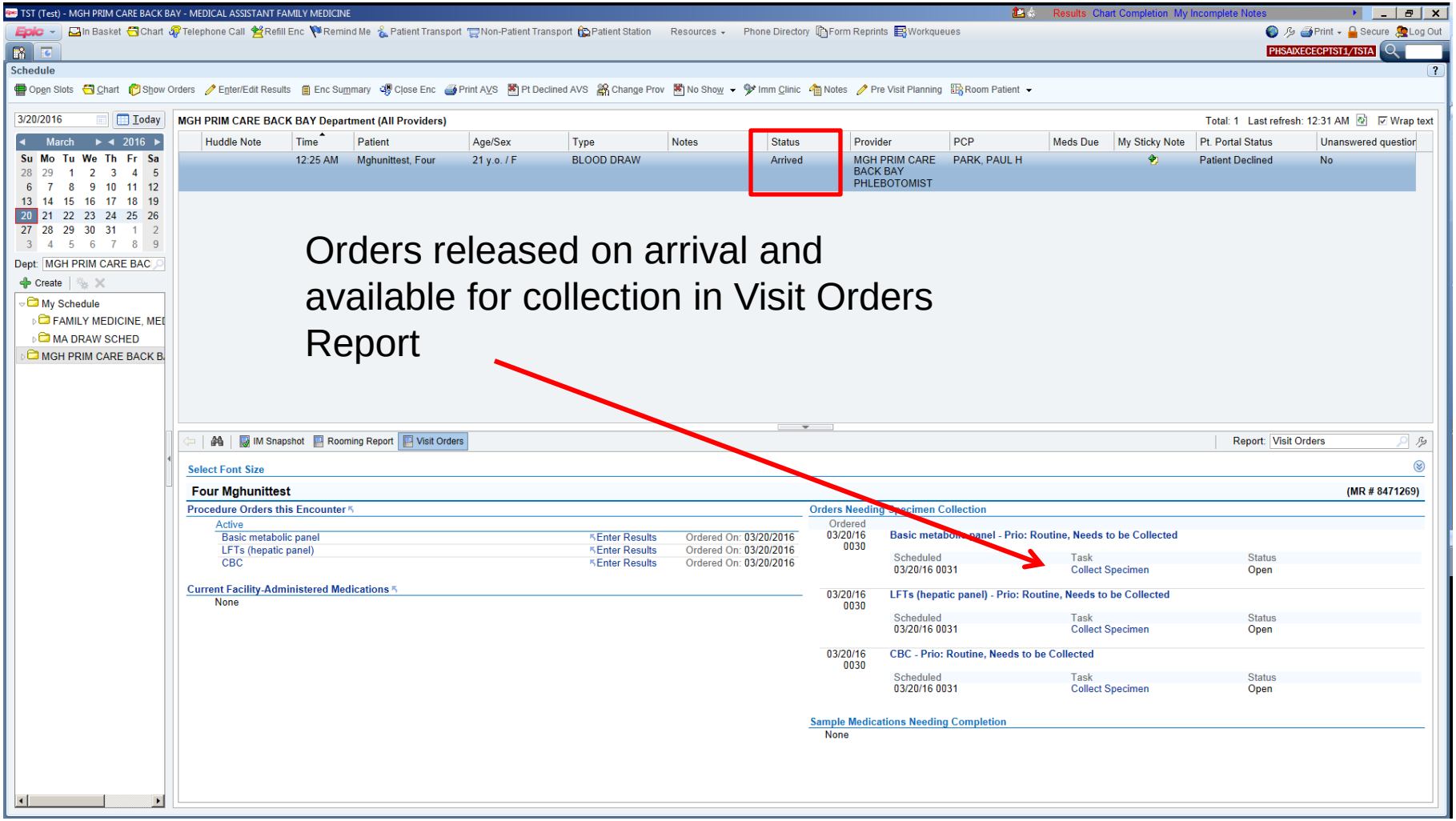
Upon Arrival, Orders Release



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APPENDIX:

1) LINKING ORDERS TO VISITS

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Order Transmittal Logic (OTL)

- Workstations can be configured with logic to automatically change the order status (e.g. Lab Collect or Clinic Collect) of an order upon release
- In **lab-run phlebotomy** areas OTL will be in place so no matter how a provider orders a lab test (Lab Collect or Clinic Collect) the order will be converted to **Lab Collect** so a standard lab collection process can be followed
- In **practices with embedded phlebotomy** the front desk and/or phlebotomy areas will have OTL in place that converts all orders (Lab Collect or Clinic Collect) to **Clinic Collect**, so a **Collection Specimen** task is consistently generated and the orders appear on the **Visit Orders** report.

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