

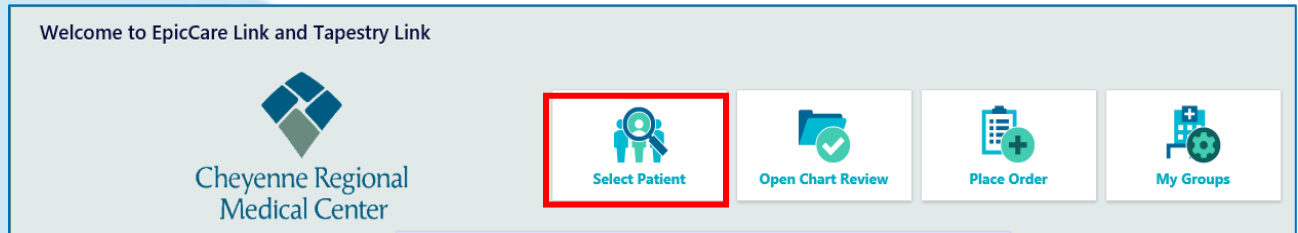
# Enter and Collect Lab Orders

## Clinics Documenting the Collection of Specimens in EpicCare Link

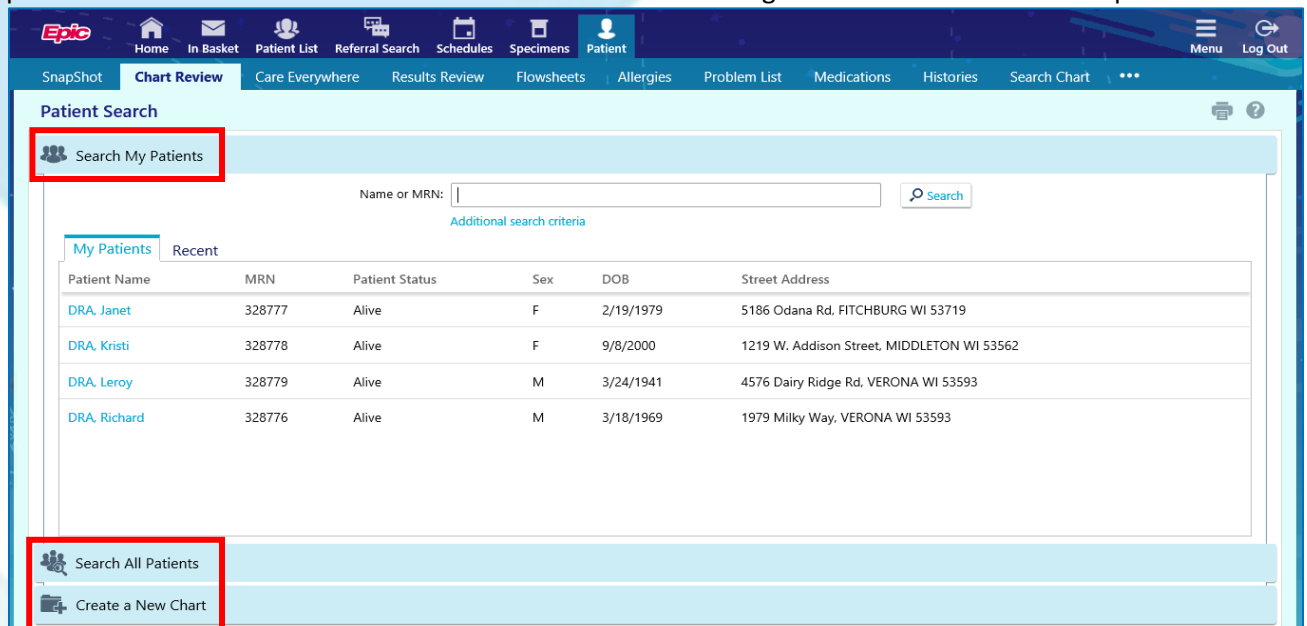
If your clinic places lab orders and documents the collection of the specimens in EpicCare Link, this tip sheet covers each step you take in EpicCare Link.

### Order the Lab Test(s)

1. Search for the patient by clicking **Select Patient**.



2. You can search for the patient with **Search My Patients**, **Search All Patients** or **Create a New Chart** if the patient is not found. Please use **Search All Patients** before using **Create a New Chart** for the patient.



- Click the ellipsis button (three dots) and select **Billing Info**.

The screenshot shows the patient snapshot for Misty Test. The 'Billing Info' menu item is highlighted with a red box. The patient information includes: Female, 45 y.o., 3/2/1975, MRN: 0000719505. The 'Billing Info' menu is open, showing options like Demographics, Billing Info, Orders, and Referrals.

- Click **Add Guarantor** to add the person who is financially responsible for the lab testing charges. Click **Add Coverage** to add the patient's insurance. You are not able to remove insurances. Please send a copy of the patient's current insurance card with the lab specimen.

The screenshot shows the Billing Information page for Misty Test. The 'Add Guarantor' and 'Add Coverage' buttons are highlighted with red boxes. The Guarantor Information table shows: Name: TEST.MISTY, Type: Personal/Family, Rel to Subc: Self, Sex: Female, DOB: 03/02/1975, SSN: [redacted]. The Coverages table shows: Payor/Plan: BCBS / BCBS WYOMING, Group: [redacted], Subc. Name: TEST.MISTY, Rel to Subc: [redacted], Subsc. ID: [redacted], Eff. From: 08/19/2020, Eff. To: [redacted].

- Ensure that **Patient is subscriber** is selected when the patient is the subscriber on the insurance plan.

The screenshot shows the 'Enter New Coverage' dialog box for Misty Test. The 'Patient is subscriber' checkbox is highlighted with a red box. The dialog box contains fields for Payor, Member ID, Plan, and Group number. The 'Patient is subscriber' checkbox is checked.

6. When someone else is the subscriber, remove the check mark for **Patient is subscriber**.

**Enter New Coverage**

**Coverage Information**

Payor:  Other

Member ID:

Plan:

Patient is subscriber

Patient relationship to subscriber:

Group number:

**Subscriber Information**

Subscriber ID:

Subscriber name:

Subscriber DOB:

Accept Cancel

7. To place the lab order(s), click the ellipsis button (three dots) and select **Order Entry**.

**Patient Snapshot**

**Orders**

Order Entry

Order Review

Referrals

Referral by Member

Aug 26 Orders Only with Hem/Onc - Beacon, P Magnesium deficiency

8. Select the authorizing (ordering) provider and click **Accept**.

**Order Entry**

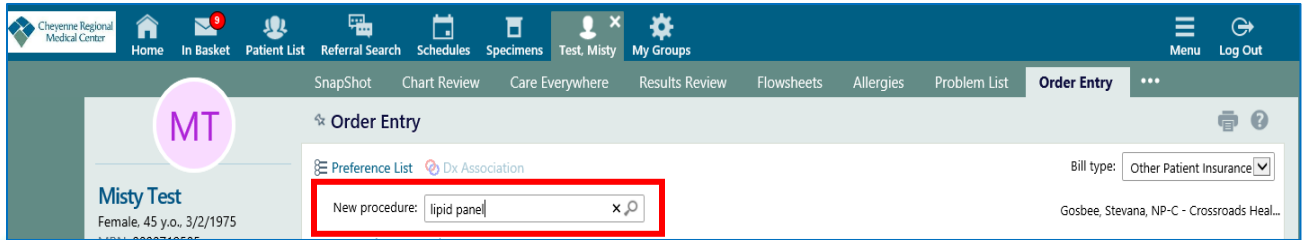
Select an authorizing provider for this order.

Select Authorizing Provider

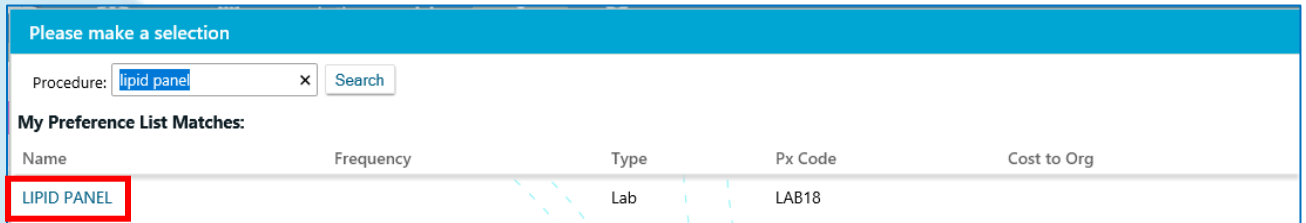
Gosbee, Stevana, NP-C

Accept

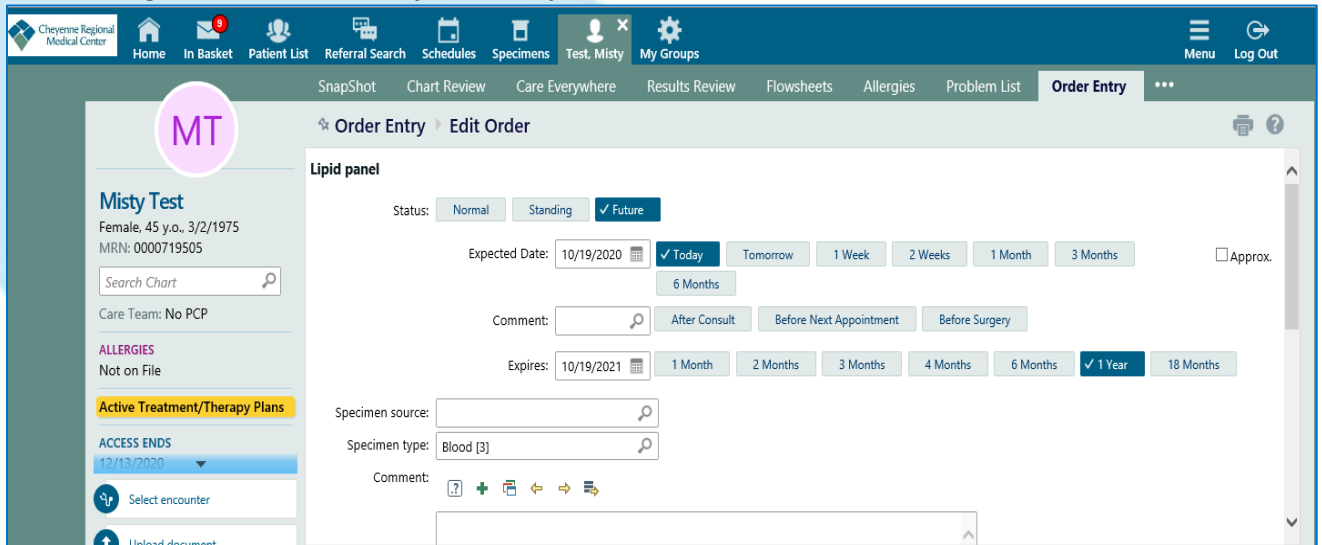
9. Search for the lab test in the **New Procedure** field.



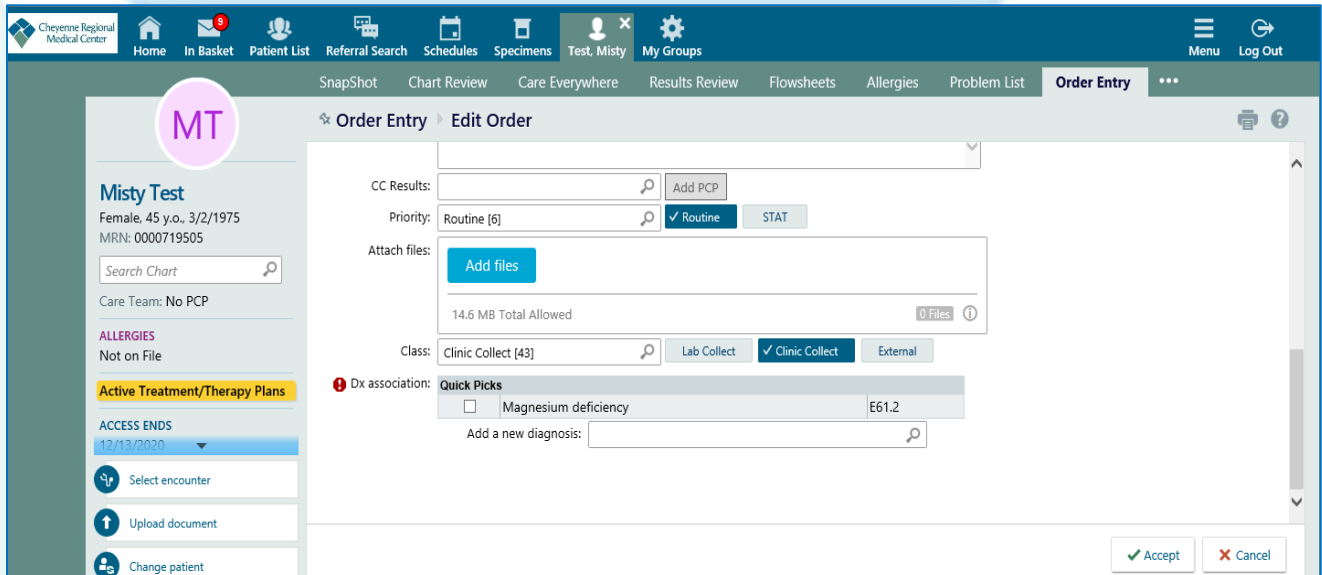
10. Click the lab test name to select it.



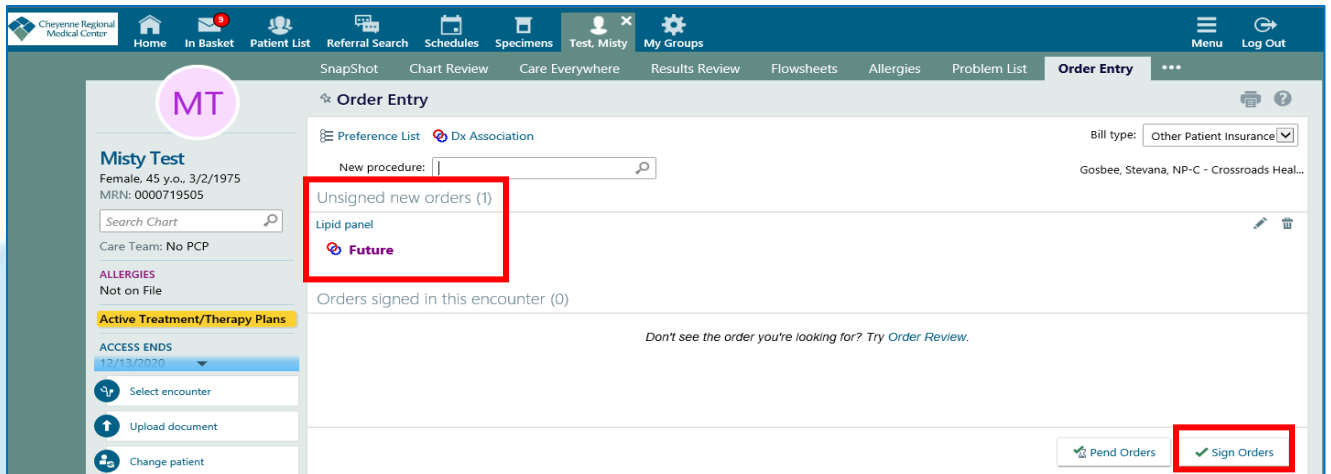
11. For one instance of the lab test, ensure the **Future** button is selected. For recurring standing orders, select the **Standing** button. Select **Today** for the **Expected Date** field.



12. Mark the **Priority** as STAT, if appropriate. The **Class** is **Clinic Collect**. Select the medically necessary diagnosis from the patient's problem list as shown under **Quick Picks**, or search for a diagnosis in the **Add a New Diagnosis** field. Click **Accept**.

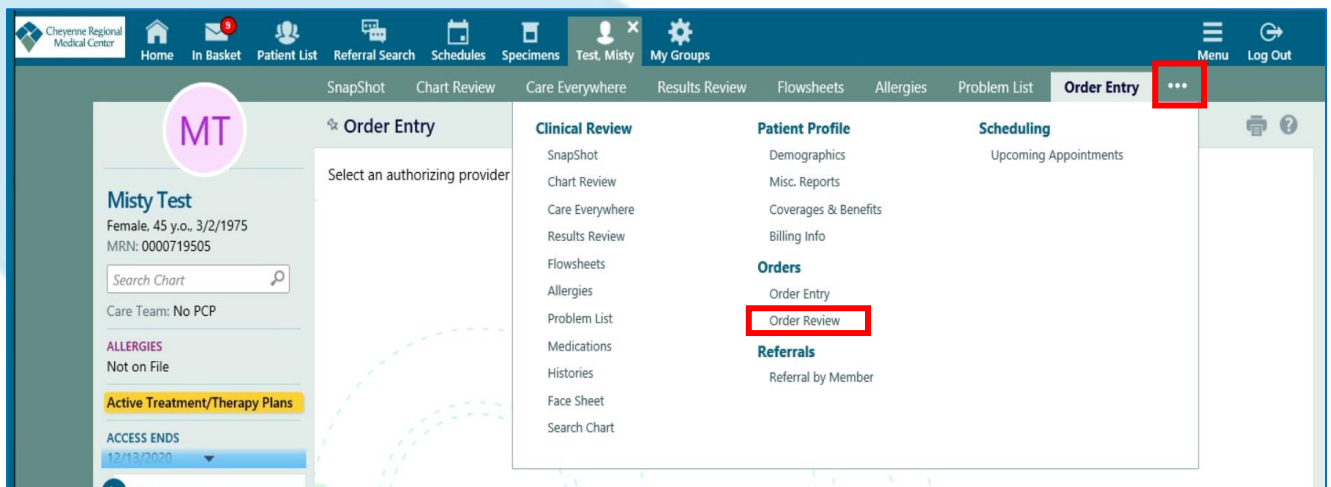


13. The lab order displays under the section, **Unsigned New Orders**. Click the **Sign Orders** button.

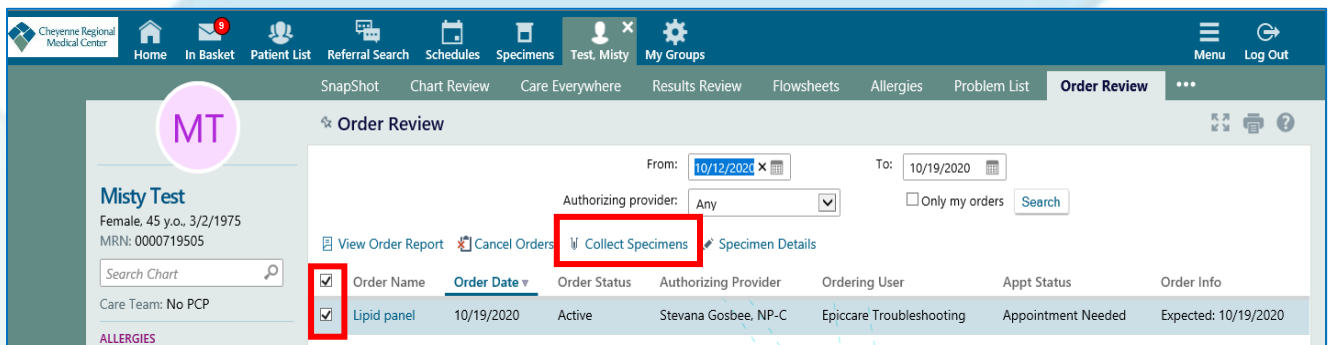


## Document the Collection of the Specimen

1. Click the ellipsis button and select **Order Review**.



2. Select the lab test(s) you are collecting. Then, click **Collect Specimen**.



3. Select either **“Bill to”** Client or Patient and answer any Ask on Entry questions.
  - a. Client billing – The hospital bills your clinic for performing the lab test(s).
  - b. Patient billing – The hospital lab bills the patient or their insurance company.

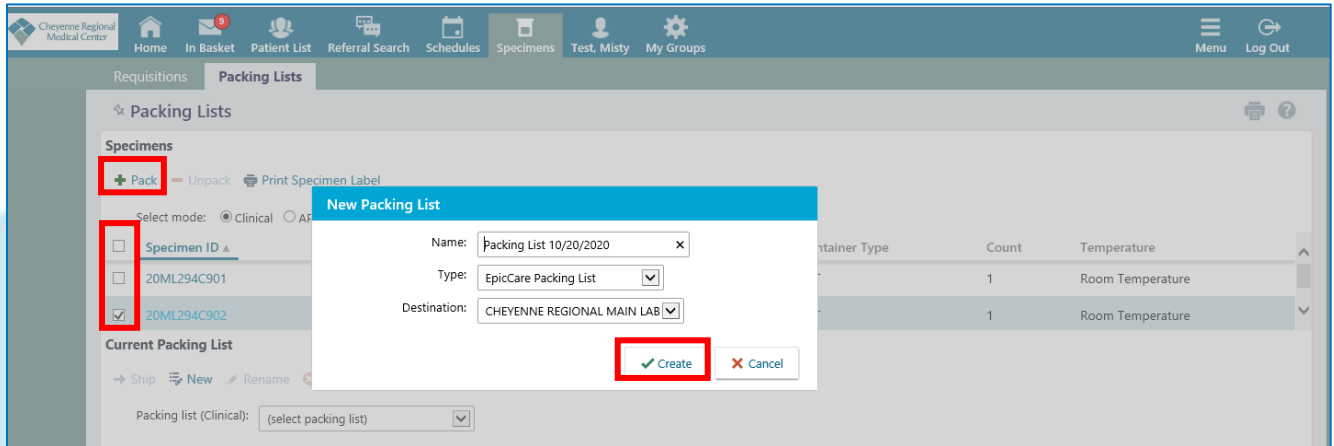
Click the **Create Specimen** button in the lower right corner of the window.

The screenshot shows the 'Order Review' window for 'Collect Specimens'. On the left, there is a patient summary for 'Misty Test' (Female, 45 y.o., 3/2/1975, MRN: 0000719505). The main area is titled 'Billing Option' and contains a 'Bill to:' dropdown menu with 'Client' and 'Patient' options, both highlighted with a red box. Below this is an 'Additional Information:' field. A red box highlights a 'LAB FASTING QUESTION WITH UNKNOWN' section with the text: 'Has the patient fasted for at least 8 hours? (This questions includes unknown as a answer choice)'. At the bottom right, there are 'Create Specimens' and 'Cancel' buttons.

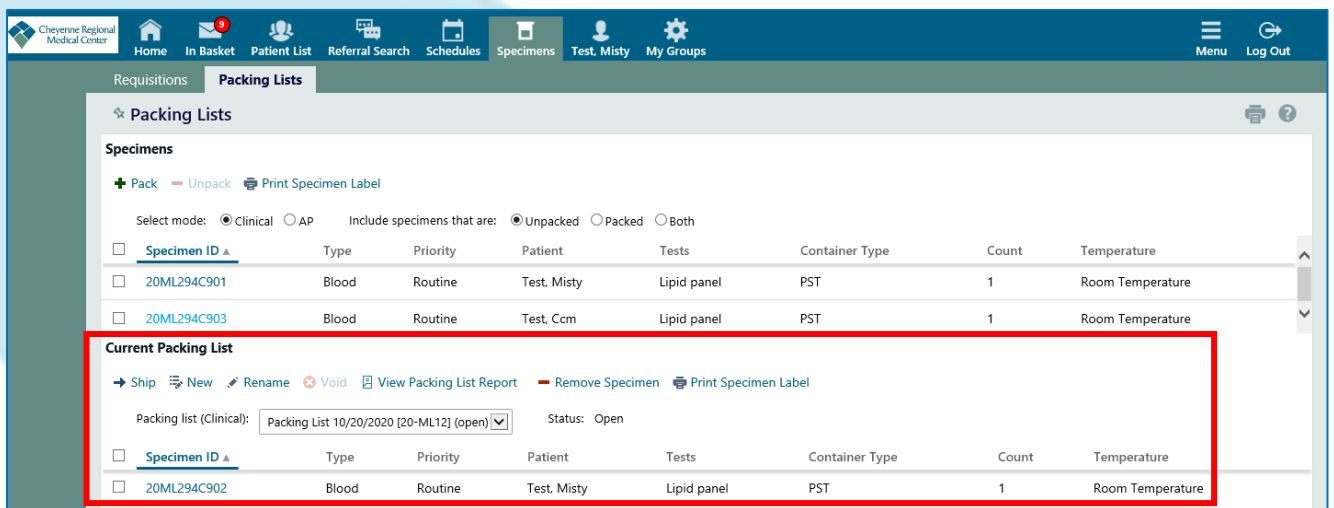
4. For the collection date, enter t to document today’s date. For the collection time, enter n to document the current time. Document the **Draw Type**, click the **Collect** button, and click the **Print Label** button as shown within the red box. To document the collection of multiple specimens, use the **Collect All** and **Print All Labels** buttons at the bottom of the window. Click the **Go to Packing Lists** button.

The screenshot shows the 'Specimen Details' window for 'Clinical Specimens'. The main area is titled 'Specimen 20ML294C901 (Blood)'. It contains the following information: Procedure: Lipid panel; Collection Requirements: PST. Also acceptable SST, Red Top-Plain, or Green Top-NIHEP. Must be centrifuged within 2 hours and separated from the cells. Collection date: 10/20/2020; Collection time: 1:35 PM; External ID: (empty field); Draw type: Butterfly (3). A red box highlights the 'Collection date', 'Collection time', 'External ID', 'Draw type', 'Collect', and 'Print Label' fields. At the bottom, there are four buttons: 'Collect All', 'Print All Labels', 'Return to Order Review', and 'Go to Packing Lists'. A red arrow points to the 'Collect All' button.

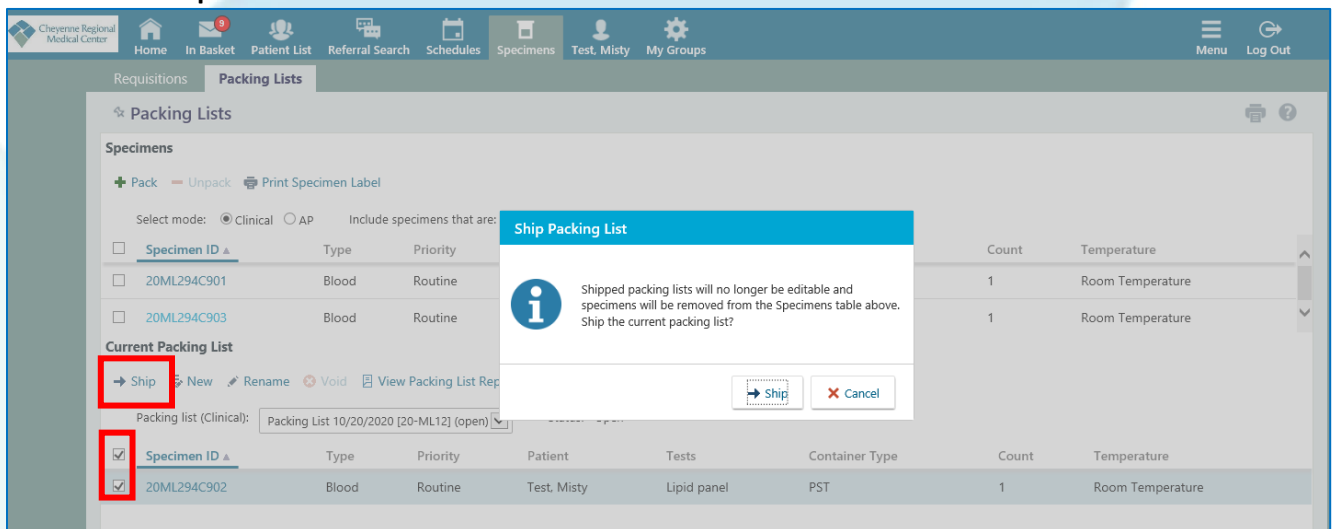
5. Select the specimen(s) to add to the packing list and click the **Pack** button. In the **New Packing List** pop-up window, click the **Create** button.



6. The selected specimen displays under the **Current Packing List** section of the window.



7. In the **Current Packing List** section, select the specimens that the lab courier will deliver to the hospital lab and click the **Ship** button.



8. The printer pop-up message displays for printing the packing list.

The screenshot shows a software interface for 'Cheyenne Regional Medical Center' with a navigation bar at the top. The main area is titled 'Packing Lists' and contains a list of specimens and a 'Current Packing List' section. A 'Print' dialog box is open in the foreground, displaying printer selection options and print settings.

**Print Dialog Box Details:**

- General Tab:**
  - Select Printer: CRSP\_EPIC\_UP\_AUTO on 172.20.0.190 (selected), Microsoft Print to PDF, Downstairs Black and White, Microsoft XPS Document Writer, Fax, Send To OneNote 2016
  - Status: Ready
  - Location: [Empty]
  - Comment: [Empty]
  - Page Range:  All (selected),  Selection,  Current Page
  - Pages:
  - Number of copies:
  - Collate
- Options Tab:** [Empty]

**Background Interface Details:**

- Specimens List:**
  - 20ML294C901
  - 20ML294C903
- Current Packing List:**
  - Packing list (Clinical): Packing List
  - 20ML294C902
- Table (Right):**

Container Type	Count	Temperature
PST	1	Room Temperature
PST	1	Room Temperature
PST	1	Room Temperature