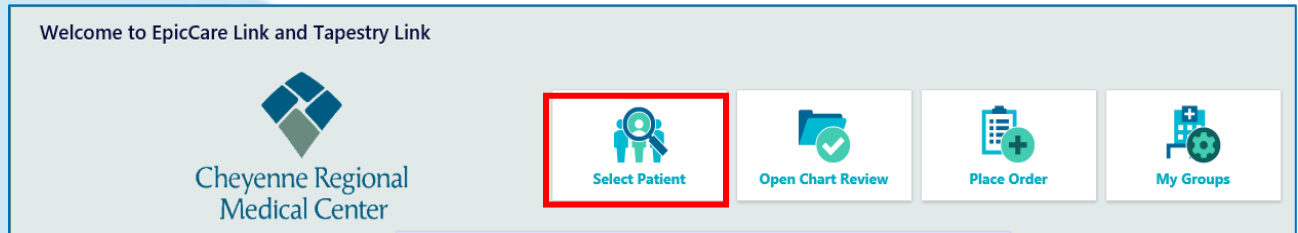TrueConnect
Powered by Epic *training*

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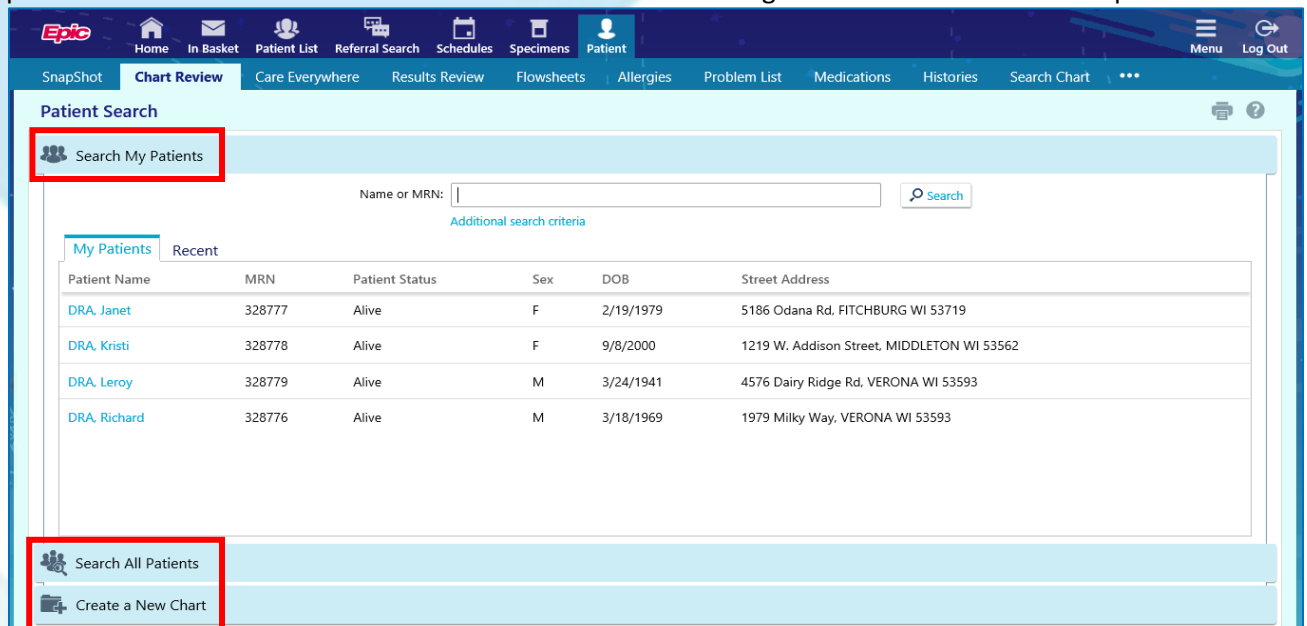
3. Click the ellipsis button (three dots) and select **Billing Info**.

4. 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.

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

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

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

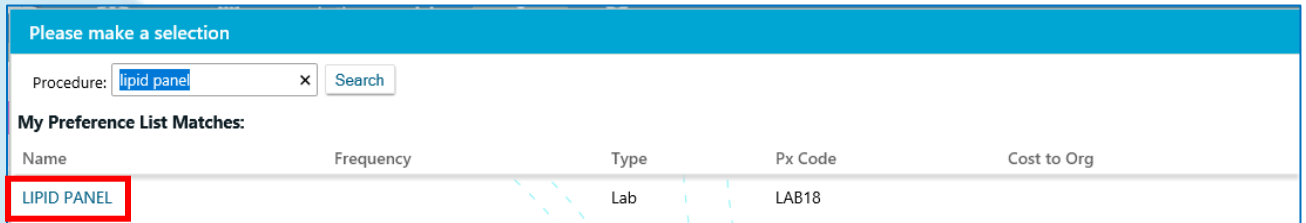8. Select the authorizing (ordering) provider and click **Accept**.
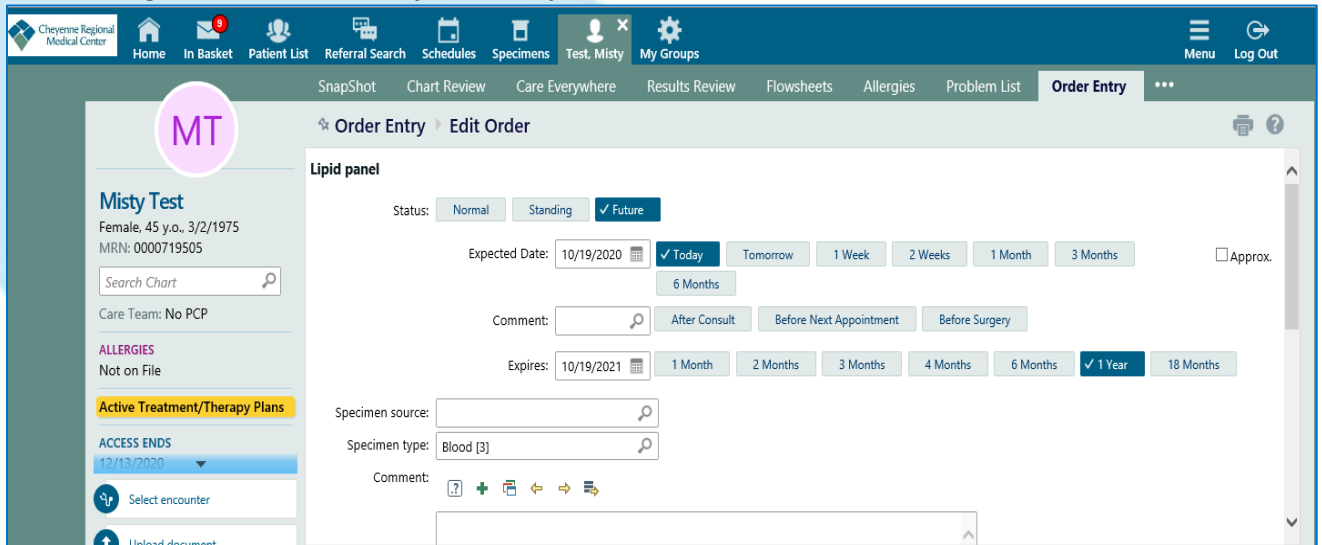
9. Search for the lab test in the **New Procedure** field.
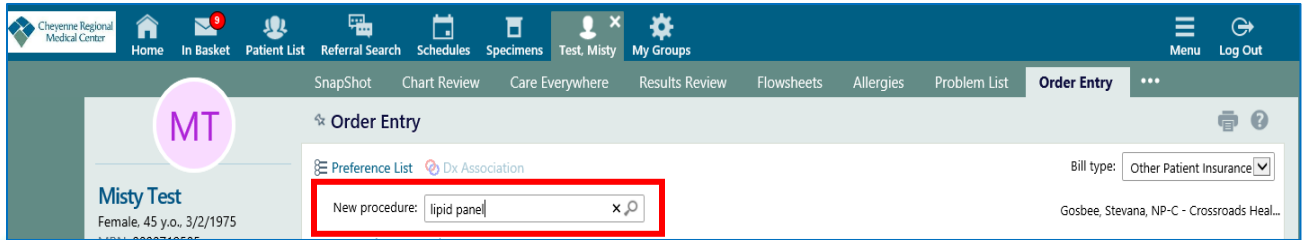

10. Click the lab test name to select it.

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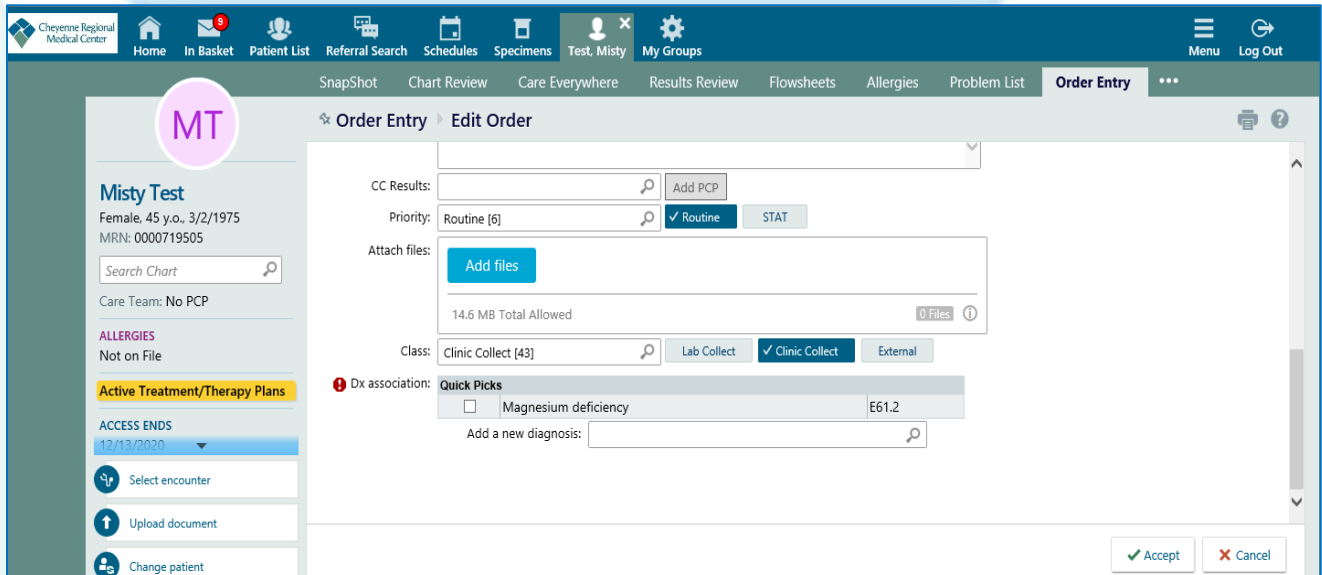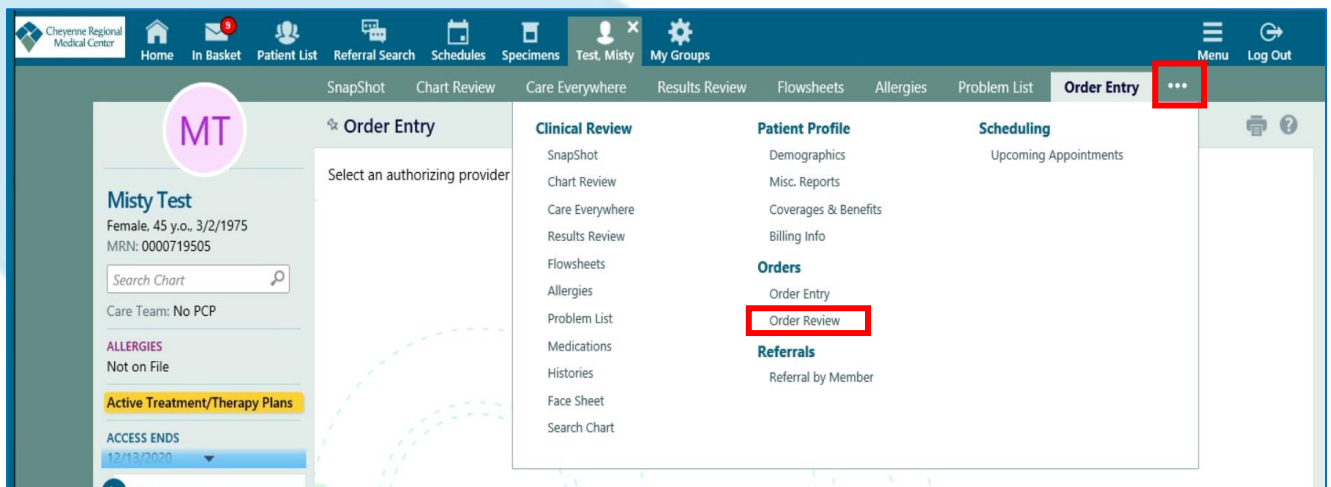
13. The lab order displays under the section, **Unsigned New Orders**. Click the **Sign Orders** button.
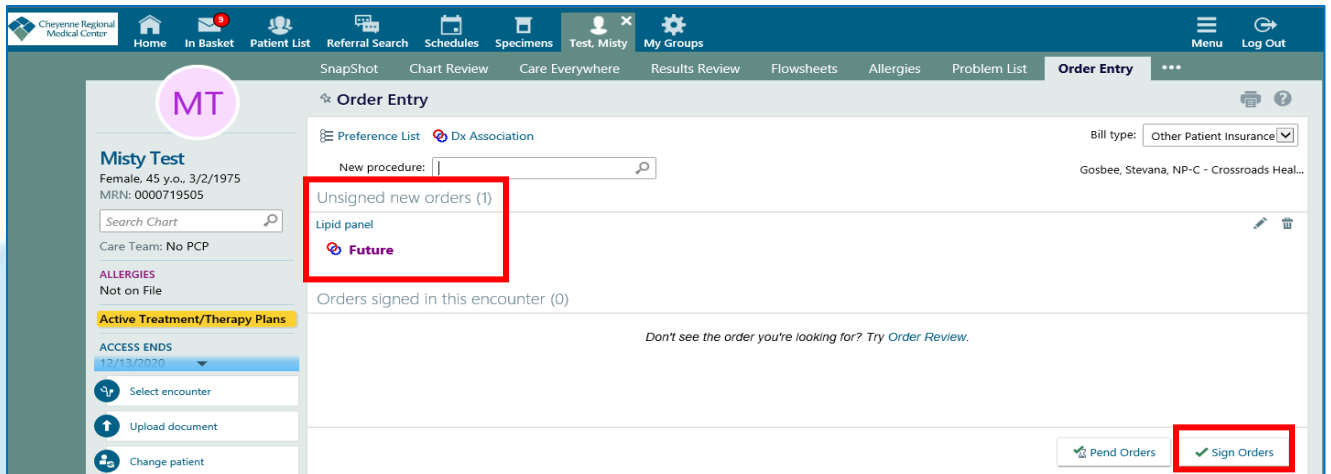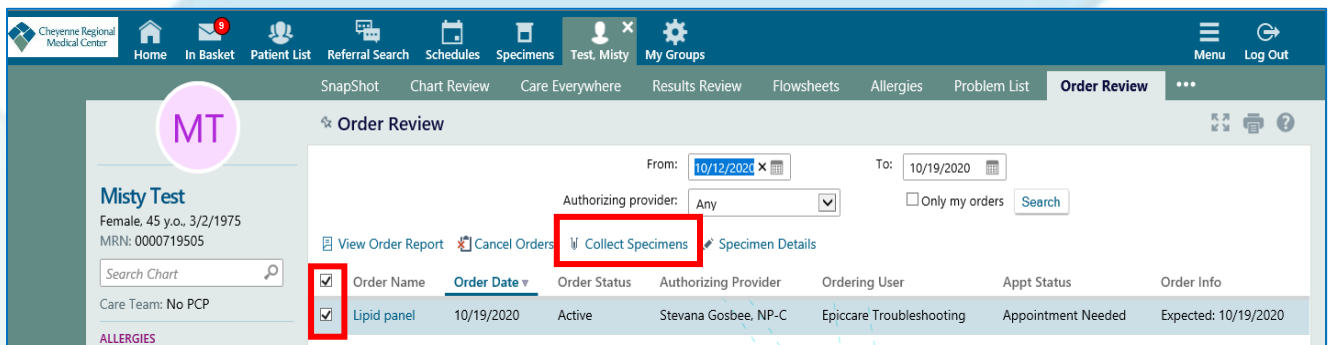

Document the Collection of the Specimen

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.

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.
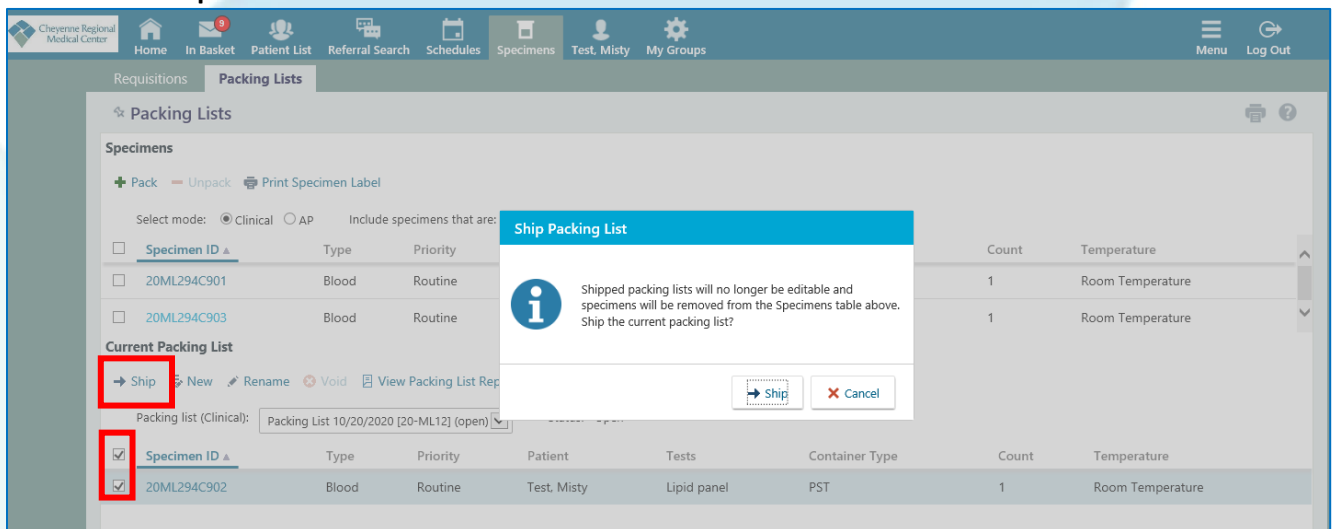
5. Select the specimen(s) to add to the packing list and click the **Pack** button. In the **New Packing List** pop-up window, click the **Create** button.
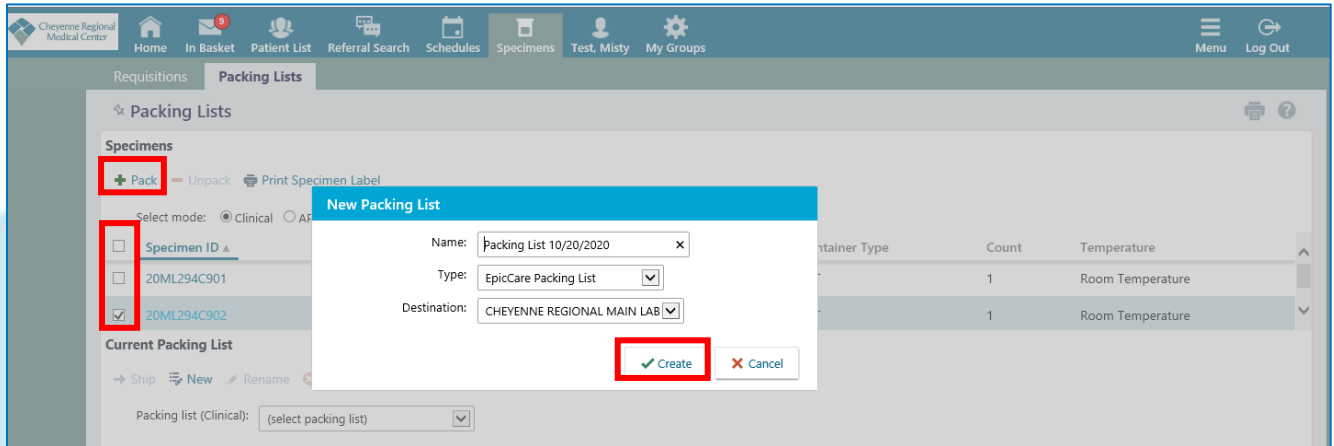
6. The selected specimen displays under the **Current Packing List** section of the window.
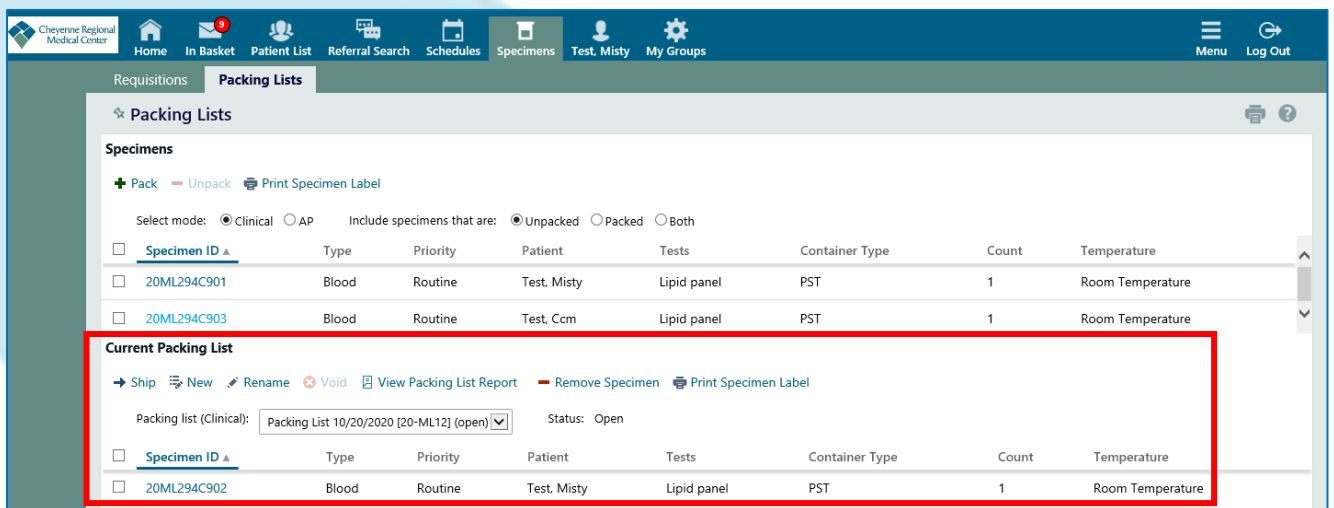
7. In the **Current Packing List** section, select the specimens that the lab courier will deliver to the hospital lab and click the **Ship** button.

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