Test Requisition and Order Entry v1.1
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Approval and Periodic Review Signatures

Type	Description	Date	Version	Performed By	Notes
Approval	Lab Director	5/23/2022	1.1	Samantha Davenport MD Service Line Chief (M03764)	
Approval	Lab Director	4/21/2022	1.1	John Fisk MD Clinical Laboratory Director (M08480)	
Approval	Lab Director	4/18/2022	1.1	Simha Sastry MD Clinical Laboratory Director (M06625)	
Approval	Lab Director	4/13/2022	1.1	Ghazala Nathu MD Clinical Laboratory Director (S00134)	
Approval	Lab Director	4/13/2022	1.1	Timothy Chapman MD Clinical Laboratory Director (M11669)	
Approval	Lab Director	4/12/2022	1.1	Valerie Bush PhD Clinical Laboratory Director (M05512)	

Version History

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1.1	Approved and Current	Initial version	2/10/2022	5/23/2022	Indefinite

TEST REQUISITION AND ORDER ENTRY

GENERAL

Regulations and departmental policies require that a test requisition be properly completed and submitted with each specimen that is not electronically ordered in the EMR. This is required for proper identification, specimen acceptance and required record keeping. Written orders are not required when the order has been placed electronically in the LIS or a system that is interfaced to the LIS.

SCOPE

This policy shall apply to all personnel submitting specimens for receipt by the Bassett Healthcare Laboratories

ADMINISTRATION

All hospital personnel are responsible for verifying that test orders or test requisitions are properly completed prior to submission to the laboratory. Laboratory personnel are responsible for verifying t h a t test orders received comply with this policy. Laboratory staff will follow up on any test requisition received that is incomplete. The CLP/OPL Team Leaders and Business & Support Services Supervisor shall be responsible for the coordination and revision of this policy and procedure.

POLICY

Each specimen submitted to the laboratory must be accompanied by the proper requisition unless the order has been placed electronically. Every requisition that is received must be signed by the ordering provider. Faxed orders are also acceptable. Verbal orders are also acceptable but are discouraged. Any verbal order must be followed with a written order within 48 hours. Results may not be released until the written order has been received.

REQUISITIONS

All laboratory requisitions must also include the following information and must be legible prior to blood collection (may be hand printed, typed, imprinted or faxed):
   a. Patient's full first and last name. This must match the name on the accompanying specimen.
   b. Patient's Medical Record Number
   c. Patient's Date of Birth
   d. Patient's Location (i.e. BVC, HHC, ONT, etc.). This is required for designation of patient report delivery
   e. Time and date of specimen collection
   f. Initials of the individual collecting the specimen(s)
   g. Patient's visit number and date of service
   h. Ordering and attending providers' numbers or names. If an attending provider is ordering the test, the same name/number will be in both fields. If request is from a non-Bassett provider, make sure to include provider's full name, mailing address and phone number. A copy of the signed order can also be submitted.
   i. Tests/profiles ordered. Indicate priority if other than routine
   j. Check box indicating that an ABN/Waiver is on file
   k. Indicate diagnosis prompting testing with either description or ICD-10 diagnosis code
   l. Provider's signature

ORDER ENTRY

Order Entry is used when a patient presents with a requisition from a Non-Bassett Provider. All laboratory requisitions must be checked twice for any order entry errors by the person entering the order and by the phlebotomists. For example: a missed test or an incorrectly ordered test.

    a. Go to "Patient Station" and enter the patient's name or medical record
    b. Select the appropriate encounter from today (highlighted green)
    c. If there is not current encounter (highlighted green), perform the one click function
    d. This will bring you to the Order Inquiry screen, Click on Add on Order at the bottom left of screen
    e. Enter the test name, or part of the name, in the search box to look up choices
    f. Select the test requested and click on Accept
    g. Answer any mandatory questions, (indicated by stop sign)
    h. Select "Sign Orders" and Select your provider by entering the name or provider number
    i. Initial and date the requisition
    j. The phlebotomist must verify all orders in Beaker are the same as the orders on the requisition
    k. Initial and date the requisition

Automatically Faxing Results to External Provider:

Results can automatically be faxed to external providers when information is provided at time of order entry. Details of how to do this depends on whether the provider and fax information is already in the system.

    a. If the Provider exists in the EMR with correct fax number, the results will be faxed automatically
    b. If the Provider exists in the EMR with an alternative or no fax number
    c. Once all tests have been entered, go to "Order Inquiry"
    d. Highlight the same orders, and click "CC Results"
    e. To add in a free text fax number, in the CC Recipient field, click * and then Enter
    f. Additional fields are now available for entry in the Additional Method Information section of the popup window
    g. Fill in the Full Name of the provider and Fax number (provided on the requisitions)
    h. If free text CC fax number is not entered before tests have been accessioned, then you must open EACH specimen in Specimen Update, and use the CC results button.

Future/One Time Orders/Transcribed Orders

Future/One Time Orders that are received <u>prior</u> to the patient's visit and are not in the LIS or EMR

The order must be sent to the Outpatient Lab and reviewed upon arrival to ensure all of the information needed is on the requisition.
The order must be entered as received using the Transcribe Orders Activity
    a. Go to "Patient Station"
    b. Click on "Transcribe Orders"
    c. In the window that appears, enter the provider who is ordering the test
    d. This is a good time to open up the provider's record in Phone Book and confirm correct contact information including fax number.
    e. If the provider is not found in the system, enter "External Provider" [225] at provider field
    f. To update incorrect information, a completed Provider Dictionary Update form
    g. and a copy of the requisition must be faxed to Kathy Park at Ext 4986
    h. Click "Accept x2", Order Entry opens
    i. Enter order(s) at New Order field

j.   Click on the summary sentence hyperlink for the first order if 225 was used
k.   Click on "Click to add text" hyperlink
l.   Add providers contact information
m.   Full name of provider
n.   Address of provider
o.   Phone and Fax numbers
p.   If there are multiple tests ordered, copy this information to be pasted into each of the tests' comments areas
q.   Click "Accept"
r.   Click "Sign Orders "

The order must also be setup to Auto Fax using the CC Results function.

Standing Orders

A Standing order from an approved provider allows the laboratory to perform tests as part of a continuing treatment without having to get a new order each time.

a.   The order must be sent to the Outpatient Lab to be entered into the LIS or EMR
b.   The provider must clearly define the frequency of testing
c.   The provider must specify duration. No order can exceed 6-month duration
d.   Laboratory staff will be assigned to maintain a current file and follow up with the ordering provider using an approved standard letter format. See Appendix A: Standing Order Renewal Request.
e.   File under "Standing Orders To Be Entered" at the Outpatient Lab desk
f.   The Laboratory Customer Service position will enter them once per week or as needed
g.   When a patient presents at the Outpatient Lab desk with a "Lab Only" script
h.   Make 2 copies
i.   The original should be returned to the patient
j.   Place one in the appropriate folder named "Standing Orders To Be Entered"
k.   One will be used for that days lab requisition to be entered into Beaker
l.   Follow the "Order Entry" process above.

Creatinine for MRI or CT Scan

There are instances when a patient presents for an MRI or CT scan and a creatinine needs to be completed before the test

a.   Go to "Patient Station"
b.   Enter the "MRN" or "Name and DOB"
c.   Click into the encounter for the DOS needed
d.   If there is not current encounter (highlighted green), perform the one click function
e.   At the bottom left hand of the screen, click on the "More" button
f.   Choose "Open Orders"
g.   This is where future Imaging orders are listed
h.   Click on the future scheduled CT or MRI scan
i.   In the bottom of the screen, scroll down and reprint the Radiology Requisition
j.   The Radiology Requisition is the order to manually order the CRTN (GFR) in order entry.
k.   The ordering provider for the CRTN is the same ordering provider for the MRI/CT Scan

Handling of Unclear Lab Orders

The Laboratory does not perform tests unless an approved provider orders them. If the order does not meet the criteria listed below, contact the ordering provider. Explain why the order is unacceptable and ask for the

information needed to complete the order:

Examples, but are not limited to:
    a. Panel(s) ordered but not available at Bassett Healthcare
    b. Handwritten orders that are not clear
    c. Orders from non-Bassett providers that do not have a signature
    d. Missing ICD-10 code or narrative for non-Bassett providers orders
    e. Patients present to the phlebotomy area without an order for the lab work in Beaker
    f. When a patient presents at the Outpatient Lab desk with a "Lab Only" script that is unclear or when a specimen arrives and the orders are incomplete or unclear:
    g. Call the ordering provider or authorized representative to obtain the required information either before drawing the patient or processing the specimen
    h. Complete the Appendix B: "Clarification of Order/Diagnosis Request Documentation Form", filling in all of the pertinent information to complete the order
    i. Staple the green clarification form to the requisition and file in Central Lab Processing

Duplicated Orders for Separate Providers

There are instances when multiple providers see a patient on the same day. Each provider may determine that laboratory tests are medically necessary. Proper documentation for these tests will be the providers' responsibility and will be documented in the EMR as well as the EPIC system.

    a. Orders for ALL provider must be released under the current visit number
    b. If duplicate tests are ordered
    c. Collect all tests BUT one set of the duplicate tests
    d. Return to Patient Station, click into the same visit, collect the duplicate tests
    e. The LIS will generate the corresponding specimen labels
    f. Only one set of the duplicate tests will be collected
    g. In the collection screen, scan ALL labels, even the duplicate labels
    h. Label the tube(s) with the LIS specimen label that contains the largest amount of tests
    i. The duplicated tests on the second LIS specimen number must be highlighted yellow
    j. The Outpatient Lab desk person will document the information concerning the patient to be credited for the duplicate testing using the form, "Duplicate Orders/Credit Request" (Appendix C). The form must be forwarded to the Laboratory Billing Coordinator every attempt should be made to assure crediting is performed prior to midnight on that day to assure that duplicate billing is not passed to the HIS
    k. Place the specimens and all labels in a specimen bag and send to CLP, along with any paper requisition orders
    l. The receiver will notice that there is a tube with an accession number and an extra set of labels with a different specimen number (this label will be highlighted)
    m. The specimens, along with the label(s) for the duplicate specimens, will be processed and delivered to the sections for testing in the specimen bag
    n. The person delivering the specimens should alert the technologist that the specimen is to be resulted on duplicate specimen number(s)
    o. Specimens will be processed by the technical section(s) and results will be entered in the following
    p. established guidelines
    q. The specimen will be run once and the results processed for the accession with the greatest number of tests on it first
    r. The second duplicate accession data will be manually entered or following established procedure of the section for editing and retransmitting this data.

Requisition Entry

Used for Employee Health, Healthworks orders, Water Sterility orders and specimens that are dropped off and the location/provider is defined as a Submitter

 a. Go to Requisition Entry
 b. In the Submitter field, type submitters name or use the magnifying glass to open the category list
 c. If you receive a requisition for a submitter that does not have records built in EPIC yet, use
 d. Generic Submitter
 e. Then, submit a Helpstar ticket with all pertinent submitter information for the build team
 f. A Requisition Number is automatically generated
 g. In the Patient field, enter the full patients name
 h. Enter the Authorizing and Ordering Provider
 i. If the provider is not in the system, enter External Provider 225, Click Create Specimens to create the specimen.
 j. Complete the collection information, including Collect Date, Collect Time and Collector
 k. Click Receive to receive the specimen(s)
 l. Click "Accept" to save your work and close Requisition Entry. Click Accept & New if you have other requisitions to complete

Miscellaneous

 a. For Microbiology, be sure to include special instructions, specimen type and site. This information is essential for proper specimen handling.
 b. Surgical Pathology and Cytology requests must also include a brief patient's clinical history, the specimen type and site.
 c. The Hospital Specimen Labeling Policy must be followed when labeling specimens.

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APPENDIX A: STANDING ORDER RENEWAL REQUEST

TO:

FROM: Bassett Medical Center, Outpatient Lab Samantha Davenport, M.D., Chief of Pathology

DATE:

RE: Review of Standing Orders

All Bassett Healthcare Clinical Laboratories are required by regulatory agencies to maintain a current and accurate Standing Order file for each patient.
Included in this memo, please find a list of your patients whose Standing orders have expired or are due to expire shortly. If the Standing Order is still required, please submit a new requisition to include the following information.

Patient's name and date of birth
Test(s) required by a physician
Diagnosis
Duration of Standing Order (up to 6 months)
Order must be dated and signed by attending physician
Please forward, if appropriate, renewed Standing order(s) as soon as possible to:

Bassett Medical Center Laboratory
1 Atwell Rd
Cooperstown, NY 13326

Or fax the order to (607) 547-6895.

If you have any questions, please contact the laboratory at (607) 547-3735. Thank you for your prompt attention to this matter.

Patient Name: _____

MRN: _____

DOB: _____

Ordering Clinician: _____

Date of Order: _____

Date of Expiration: _____

Test(s):   _____

Diagnosis: _____

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APPENDIX B: CLARIFICATION OF ORDER/DIAGNOSIS REQUEST DOCUMENTATION

Laboratory Site: _____

Patient Name: _____ MRN: _____ _____

Ordering Provider: _____ Visit #: _____

Provider Phone #: _____ DOS: _____

Clarification of Orders:

Test(s) ordered on requisition that require(s) confirmation: _____

_____

Confirmed test(s) ordered: _____

_____

Test(s) confirmed by (name of person providing information): _____ Information

collected by (name of person making call): _____ Date/time

of call: _____

Diagnosis Request:

Date/time of call: (initial contact): _____ Record all

subsequent calls if initial call was not successful:

Date/time of call: _____ Date/time of call: _____ Date/time of call: _____ Test(s)

ordered: _____

_____

Diagnosis provided (code or narrative): _____ Diagnosis

provided by (name of person providing information: _____

Information collected by (name of person making call): _____

Clarification of Orders MUST be filed with the original requisition.

Diagnostic information MUST be forwarded to the Laboratory Coder for entry and filing.

APPENDIX C: DUPLICATE ORDERS/CREDIT REQUEST

Forward to: Lab Billing Office at Bassett Medical Center Laboratory, T1 Clinic Building
Fax: 607-547-5438
Email:LabBillingStaff@bassett.org

Patient Name: _____

Medical Record #: _____

Date of Service: _____

Visit numbers: _____

Tests to be credited: _____

_____

_____

Reason for credit:

Duplicate _____

Other _____ (Please specify) _____

Person /Lab requesting credit: _____

Date: _____