Lab Orders Training Guide

Sacramento County Avatar Training and Support
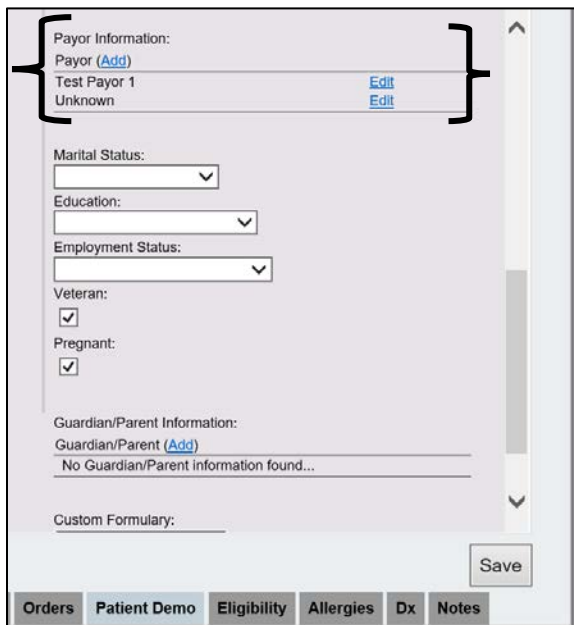
Purpose of this Training Guide:

This Training Guide is designed to give additional support in navigating Lab Orders through Order Connect after attending Avatar NX training. The Training Guide may change as Avatar NX trainings are updated. If you have any additional questions please contact Avatar Support at 916-876-5806 or Avatar@Saccounty.net.

Lab Orders Through Order Connect:

The Orders section in Order Connect will allow you to electronically send and receive lab orders. Currently, lab orders can be sent and received through Quest Labs only. Labs can be sent to other vendors by either printing or faxing the order. Results from other vendors will have to be entered into Order Connect manually.

Payor Information:

Before entering a lab order the Payor Information needs to be filled out in the Patient Demographics section in Order Connect. Admin staff enter this information, you will want to verify it has been entered into the system. If there are no payors entered check with your agencies admin staff to complete this process.

Overview of Current Order Profile:

- From the RX Profile screen, navigate to the "Orders" tab. This displays your current Order Profile grid.

- Click on the blue **"Add Order"** hyperlink on the bottom-right of this screen to add a new lab order.

Demographics and Sorting fields- You can sort all of the order information by Date, Order Type, Status, Reviewed or Normal.

Salmon rows-Lab results received from lab vendor.

Yellow rows -Lab orders sent by Order Connect.

Grey rows- Orders that have been discontinued.

Quick Links & Navigation Tabs

Creating a Lab Order:

1. Click the Add Order hyperlink on the Current Order Profile.
2. Select the Ordering Practitioner, Order Type, PSC, Destination, and Payors, Click Next.

"ELMER TEST" ENTRY V MR TEST MR# 758277000, Male, 14, 09/01/2006
Ischemia

General Information

*Ordering Practitioner:
Miller, Justin

*Order Type:
◉ Lab ○ Radiology

Patient Service Center Order (PSC):
○ Yes ◉ No

Primary Payor Information

Subscriber
TEST, ENTRY

Relationship
Self

Address
450 Second Avenue, Sacramento, CA, 95833

Ordering Practitioner– Automatically defaults to the Order Connect user currently logged in. If placing the order on behalf of a practitioner, select the practitioner from this dropdown.

Order Type– This will default to "Lab" leave this option selected.

Patient Service Center Order (PSC) – Is this lab order being submitted to a Patient Service Center? (Yes or No) Generally this is set to "No".

Primary Payor Information-This is the information about the client or whoever is paying for services.

iller, Justin

Diagnostics

Medi-Cal

"ELMER TEST" ENTRY V MR TEST MR# 758277000, Male, 14, 09/01/2006
Ischemia

Destination– The laboratory to which we are submitting this lab order.

Primary Payor – This indicates who will be the main payor for this lab order. When you click on the dropdown you can select the payor.

- If the payor isn't set up you can click on the "**Edit Payor Info**" link and that will take you to the Patient Demographics screen where you can update the payor information.

*Note- In this example Medi-Cal would be billed for this Lab. If your agency will be paying for the Labs you can select **Bill ordering Provider**.*

Secondary Payor- this is used to indicate a secondary payor for the labs.

*Destination:
Quest Diagnostics

Primary Payor: Edit Payor Info
Medi-Cal

Secondary Payor:
--SELECT--

Shows Policy information based on the payor selected above.

Policy #
123456A
Group #
N/A
ID
N/A
Medicare Payor
No

Overview
Ordering Practitioner:
Miller, Justin
Destination:
Quest Diagnostics
Primary Payor:
Medi-Cal

Next- To move on to the next step.

Cancel- Cancels the order and closes.

[Next] [Cancel]

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3. A list of lab orders will be available for you to choose from. You can narrow down the search using the filters above. If your agency uses panels you can search the panel and

the labs in that panel will populate. Click the Add button to add the lab order. When a lab is added it will appear under the Overview section.

The Search Options can be used to narrow down your search results.

Below are different examples of how you can use the filters

Panels: Allow you to add a pre-added lab group that has been created by the Avatar team.

If a panel is chosen and you click Search, the lab orders within that panel will populate below. Click Add for each order you want or Add All to add the entire panel.

Last Updated 6/22/22

Description:

You can search
by the entire
description or
a short piece
of it.

Order Code:

Enter the
Order Code for
the lab order

4. To remove a single order click on the order from the Order pane, and then click on the "Remove" button. If you want to remove all of the orders added so far, click on the "Remove All" button. Then you will have to re-add the Labs you want before you can proceed. Once you are ready to move to the next step click on the "Next" button.

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5. Enter any Special Instructions if applicable. Choose the Reason Code and Diagnosis for this order. Once all information has been entered you would click "Next" to proceed to the confirmation screen.

6. Review the order and check the eLab option to transmit this lab order electronically to the Quest Labs destination. If the order is going to a different vendor choose the option for Print or Fax. Click the "Submit" button to send the lab order out.

Viewing Lab Results in Order Connect:

1. Once an order has been received, there are a couple of ways you can review results. You can click on the hyperlink on the Date for the specific result. Or, by clicking on the **"**Results Queue**"** link at the bottom of the screen. If the lab has already been reviewed there will be a date shown on the Date field, if not it will say No.

2. If you click on the Date field, a window will appear and you can review the lab results in detail. You can also mark that the labs have been reviewed.

3. If you click on the Results Queue link at the bottom of the Profile Page This will open up the Lab Results Queue exclusively filtered for this client.

4. If you would like to access the Results Queue for any and all clients, click on the "Labs to Review" tab from the OC Prescriber's Desktop.

5. There are three tabs in the Labs to Review tab, "Needs Review", "Unmatched", "All Results". To review a Lab Result, click on the blue hyperlink of the result in the "Description" column while on the "Needs Review" tab. As long as results don't come into the "Unmatched" queue (meaning the Name, DOB, and Gender of the client for the result doesn't match any clients in the OC database), the results will be fed back down into your CareRecord (Avatar).

6. To review this result and move it out of the "Needs Review" tab from the Results Queue you will perform a Clinical Review. Once the result is reviewed, a user can denote who performed the review by selecting the "Reviewer" from the "Clinical Review By" dropdown. Additionally, by clicking on the clipboard icon next to the dropdown, one can add notes to the review.

7. Once a lab result has been reviewed, it moves from the "Needs Review" tab to the "All Results" tab in the Results Queue.

Viewing Lab Results in Avatar:

Review Results Form

1. Search "Review Results" in the "What can I help you find?" bar in Avatar NX. The "Review Results" form will open, enter the client ID and the date range for the lab results you want to view. All results that fit the criteria of your search will populate in the Select Results drop-down.

2. Select the results you want to view. The Order, Results, and Results History will populate with the information for that lab order.
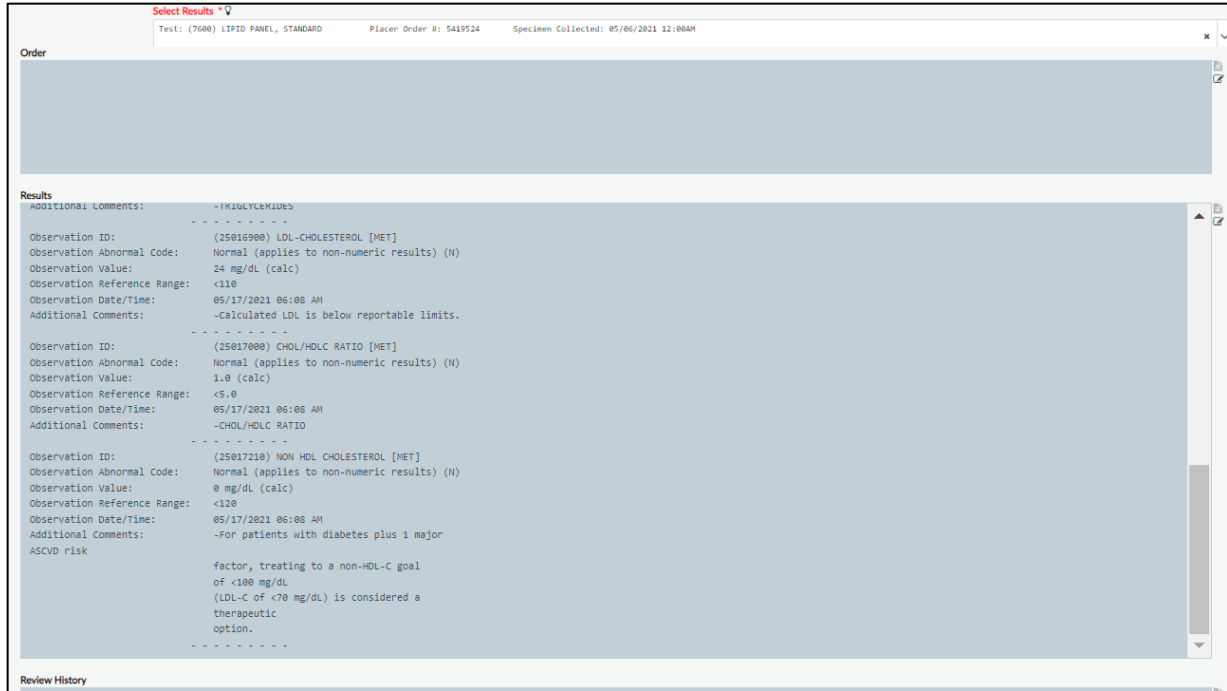
3. You can add comments into the comments section.
4. If you are reviewing the results on behalf of a physician you can send a notification to them to review the results. The notification will populate on their To-Do widget.
5. You are able to print the results by clicking the View/Print Results button. The viewed results can also be sent to a provider. The results will show up on their To-Do widget.
6. Indicate whether the results have been reviewed with the client and the Review Status.
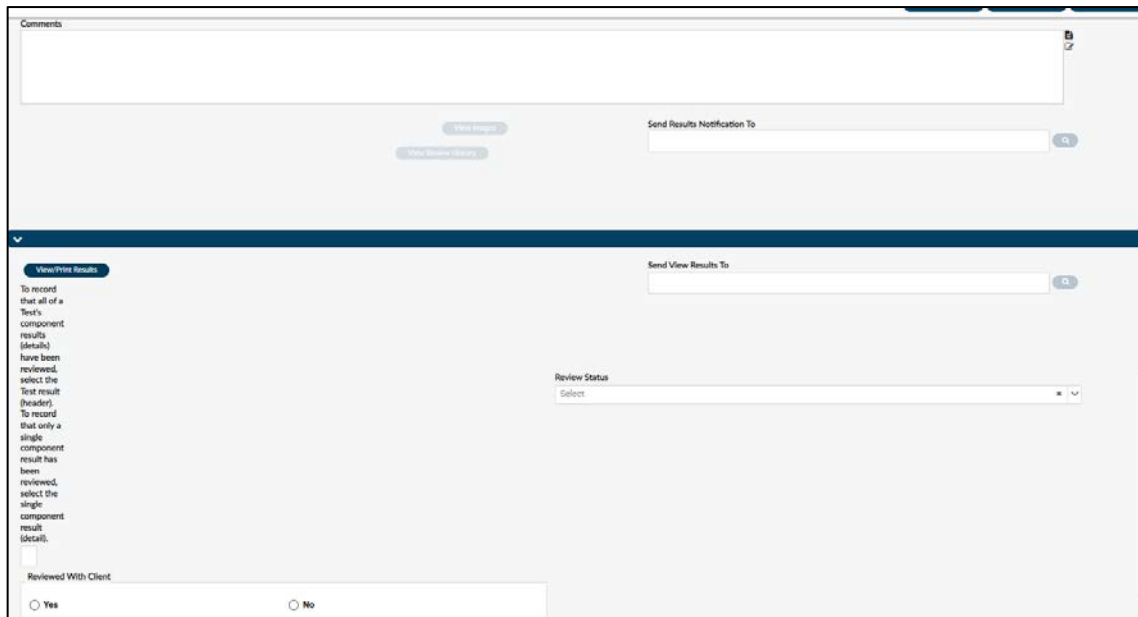
View Results Form

1. Enter the date range that you want to display lab results.
2. Click the "Display Results List/Select Result to View/Print" button. This will display all lab results that fall under the criteria you entered above. Select the lab(s) you want to view and click OK.

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3. The result information for the lab(s) will populate in the Results Information window.


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                                                                          Submit        Discard

 Test Code: 36637
 Test Description: OXCARBAZEPINE METABOLITE
 Ordering Practitioner (Not Enrolled): Justin Miller ()
 Result Status Code: Final results; results stored and verified.  Can only be changed with a corrected result. (F)
 Specimen Collected Date: 10/15/2020     Specimen Collected Time: 12:00 AM
 Specimen Received Date: 10/15/2020      Specimen Received Time: 12:42 PM
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 DETAIL INFORMATION
 -----------------------------------------------------------------------------------------------
 Observation ID Code: 85998764
 Observation ID Value: 10-HYDROXYCARBAZEPINE
 Observation ID Type: QDIMET
 Observation Reference Range: 8.0-35.0
 Observation Result Status Code: Final result - can only be changed with a corrected result (F)
 Observation Value: 14.3
 Observation Value Unit: mcg/mL
 Observation Date: 10/15/2020     Observation Time: 01:19 PM
 Additional Comments:            -
                                 This test was developed and its analytical performance
                                 characteristics have been determined by Quest
                                 Diagnostics. It has not been cleared or approved by the
                                 FDA. This assay has been validated pursuant to the CLIA
                                 regulations and is used for clinical purposes.
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                           Print Result(s)              Exit Option
```

4. From here you can print the lab results.

Client Labs Console

1. Click on the Client Labs console at the top of your Avatar NX screen. If you don't see this console click on the drop-down next to your console list and find it there.
2. Select a client from your My Client list or look them up on the "What can I help you find?" bar. That will drop them onto your Recent Clients list (right below My Clients)
3. The Lab Results widget will show all lab results for the selected client. You can use the filters at the top of the widget to narrow down your search.

4. The Recent Lab Results widget will show all recent lab results for that client. If there are no recent lab results the widget will remain blank.

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