Regional Pathology Services

LabWorks User Guide

-Client User Manual-

ATLAS ™
MEDICAL

Table of Contents

Internet Settings

Pop-up Blocker Information

By default, Internet Explorer displays pop-ups that appear as a result of you clicking a link or button. Pop-up Blocker blocks pop-ups that are displayed automatically (without you clicking a link or button). If you want to allow a specific website to display automatic pop-ups, follow these steps:

In order to use Atlas LabWorks, your pop-up blocker must be disabled for the lab order site. This will not affect blocking of pop-ups for other sites.

In Internet Explorer, click the Tools button, point to Pop-up Blocker, and then click Pop-up Blocker Settings.

In the Address of website to allow box, type the address (or URL) http://reglab.unmc.edu and then click Add.

When you are finished adding websites, click Close.

Note: The Google, Yahoo, or MSN toolbars **MUST** be removed for Labworks to function properly.

Internet Settings
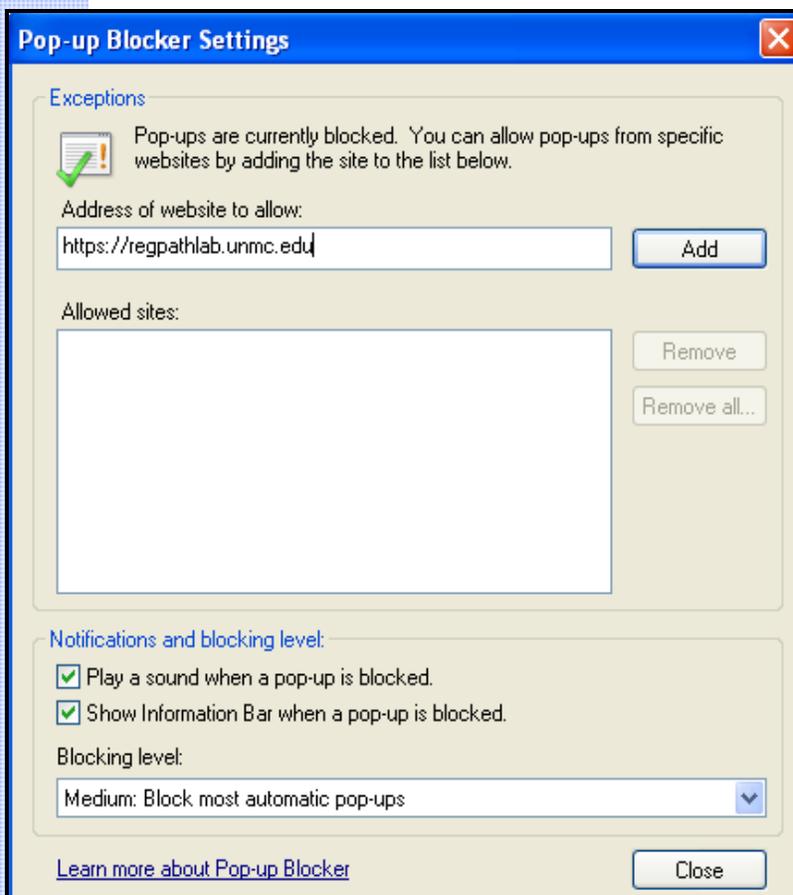
Trusted Site Designation

In Internet Explorer:
1. Tools Menu

2. Internet options option

3. Click on the Security tab.

4. Click on Trusted Sites

5. Click on Sites

6. A dialog box will open.

7. Type in the URL of the Labworks system into the text box- https://regpathlab.unmc.edu

8. Click on ADD

9. The site will appear in the Websites list

10. Click CLOSE

4
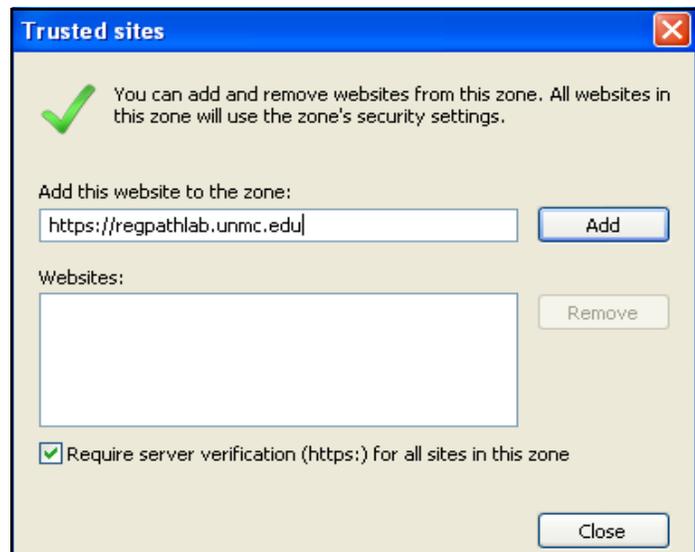
How to login to LabWorks

User Name [   ]

Password [   ]

Login   **Exit**

1   Click on the **LabWorks** icon on the desktop to launch the software in a Web browser.

2   When the login window appears, enter your username and password and click login. The Patient Search screen will open by default.

Search for Patient Records

1. Click on **Go to Patient Search** from the Patients Menu.
   - The Patient Search screen opens by default on log in.
2. Enter the patient's full or partial ID number or name into the blank field.
   - Enter fewer characters for broader searchers.
3. Click on **Search**.
   - A list of patient records meeting the search requirements will appear.
4. Click **Advanced** to perform a complex search.
5. Use as many fields as needed.
6. Click **OK**.

1. From the Patient Search screen, click the **New Patient** link.

   See **Find a Patient** to get to the Patient Search screen.

| Patients | Orders | Results | User | Master Files | System | Help | send orders to lab | previous | log out |

Patient Search

| Patient | DOB-Age | ID |
| Prim. Phys | SSN | Gender |

Lookup By

Patient [   ] [Search] [Clear] ☐ Recently Selected Patients [Advanced >>]

| Name | ID | SSN | DOB | Gender | City |

1

⊞ **New Patient**   → Demographics   → Insurance   → Check In   ■ Delete Patient   ☐ Show Deleted Patients

[New Lab Order]

2. When the **Details** screen appears, enter patient information. Highlighted fields are required.

3. Click the **Insurance** tab to fill in patient's Primary Insurance information.

Patient Demographics

| Patient | DOB-Age | ID |
| Prim. Phys | SSN | Gender |

3

Details | Insurance

Details   **Required Fields** ☐

Billing Type [Account ▾]   Address [   ]
Name (L F M) [   ][   ][   ]   [   ]
AKA [   ]   [   ]
Patient ID [   ]   City [▾]
SSN [   ] [Auto Assign SSN]   State [   ] ZIP Code [   ]
2 DOB [   ]   Phone # [   ]
Physician [▾]   E-mail [   ]
Gender [▾]   Notes [   ]
Language [▾]
Ethnicity [▾]

⊞ Guarantor   ⊞ WRN List   ⊞ Allergies   ⊞ Contacts   → Audit Details   → New Lab Order   → Other Sites   [Save Patient]
⊞ New Patient

4. If the subscriber information is the same as the patient's, click **Copy Subscriber Information from Patient**.

| Patients | Orders | Results | User | Master Files | System | Help | send orders to lab | previous | log out |

Patient Demographics

| Patient | DOB-Age | ID |
| Prim. Phys | SSN | Gender |

Details | Insurance

Insurance Providers   ● Pre-Approved ● Local   **Required Fields** ☐

Primary Insurer   [Show Secondary Insurer >>]

Primary Insurer   filter by: ☐ Medicare ☐ Medicaid   Clear Primary Insurer Data
[▾]   Status [   ]
Network [▾]   Policy # [   ]
Responsible Party (L F MI) [   ][   ][   ]   Group ID # [   ]
Issue Date [   ]   Expires [   ]

Subscriber (L F MI) [   ][   ][   ]   Relationship [▾]
4 Address [   ]   Gender [▾]
[   ]   SSN [   ]
City, State ZIP Code [   ]   DOB [   ]
Employer [▾]   Phone [   ]

Copy Subscriber Information From Patient

⊞ Guarantor   ⊞ WRN List   ⊞ Allergies   ⊞ Contacts   → Audit Details   → New Lab Order   → Other Sites   [Save Patient]
⊞ New Patient

5.   To enter guarantor information, click the **guarantor** link on the **Insurance** window.

6.   Enter the guarantor's information. If the information is the same as the patient's, click **Copy from Patient**, then click OK.

7.   If the guarantor information is the same as the primary insurers, click **Copy from Primary Insurer**, then click OK.

8.   Click on **Save Patient.**

NOTE:
Before entering a new patient into the system, make sure a record does not exist. If a patient is duplicated, an administrator can merge the two records. Please contact Regional Pathology Services for more information.

Edit a Patient Record

1. Find the patient record needed.

    See **Find a Patient** on page 2 for steps.

2. Select the desired patient record and then click the **Demographics** link.
    -Double clicking the patient name will also bring up Demographics.

.

3. Enter information changes to the patient's record as needed.

    To change:
      -patient allergies
      -emergency contacts

4. Click the desired link, make changes in the dialogue box and click OK. This information is **not sent** to the lab.

7. Click the insurance tab to make changes to insurance information.

Additional Insurance Tab Information

View either pre-approved or local insurance carriers in the drop-down menu.

Switch between primary and secondary insurance carriers.

1. Select the required patient record and click **New Lab Order**.

2. When the **Order Info** tab appears, fill in the required information.

Select **In Office** or **PSC** from the site drop-down menu.

3. Click **Continue**.

There are two methods to **select the test or tests** to be sent to the lab:

4. Using the **drop-down** menu, search for any test by: test code, name or mnemonic. Click on the desired test.

5. Using the **Short List**, select the box next to the desired test.

You can use the **Test Catalogue** to view test details and distinguish tests.

6. All of the selected tests should appear in the **Ordered Test** list.

7. Click **Continue**.

10

8. Select an ICD-9 to apply to the whole order, or select tests individually.

ICD-9s are used by Medicare and other companies for coverage purposes.

9. Use the drop-down menu to find the appropriate ICD-9.

The Short List below can also be used to find an ICD-9.

10. Repeat the ICD-9 process for each test and then Click **Continue**.

11. If an ICD-9 fails, click the View Policy Tests link to view a list of qualifying ICD-9s.

12. The **Questions** tab will appear if a test requires additional information or if specific conditions need to be met.

Example: The questions tab will ask if a patient has fasted before a cholesterol test.

13. Click **Continue**. The requisition, ABN and specimen labels will automatically print.

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14. To complete the order, click the Send Order to Lab link when the courier arrives. This will print the manifests.

Stat orders are usually sent separately with their own manifests.

Patients	Orders	Results	User	Master Files	System	Help	**send orders to lab**	previous	log out

Patient Search

Patient   DOB-Age   ID
Prim. Phys   SSN   Gender

Lookup By

Patient [＿＿＿＿＿＿＿＿＿] (Search) (Clear) ☐ Recently Selected Patients (Advanced >>)

Name	ID	SSN	DOB	Gender	City	✳

Using the Test Catalog

The Test Catalog provides test details that are useful in differentiating between similar tests.

1. When the Tests tab appears while placing a new lab order, click the **Test Catalog** link for test information.

2. The Test Catalog will appear in a new dialog box.

3. Lookup a test using its Code, Name or Mnemonic.

4. Information about a test is provided in the second grid. Click the different tabs to view all of the information.

5. To exit the Test Catalog, click **OK**.

New Lab Order

Patient	Andrews,Morgan	DOB-Age	08/07/1942 – 63 Y	ID	6789321
Prim. Phys	McGann,Maurice	SSN	210–06–7893	Gender	Male
Ord. Phys	McGann,Maurice	Order #	00LTS120000076	Accn #	

Order Info | Tests | ICD-9s | Questions

Order Tests

Tests [   ] filter by: ⦿ Code ○ Name ○ Mnemonic

Short List   ⦿ Site ○ Physician ○ Specialty [   ]

☐ CHOLESTEROL   ☐ CULTURE - ROUTINE   ☐ CULTURE - BLOOD   ☐ PAP,DIAG,w HPV-HIGH IF ...
☐ BACTERIAL VAGINOSUS ... ☐ RITTER CULTURE - ANAER... ☐ CULTURE - RESP, UPPER (... ☐ CULTURE - FUNGUS
☐ TESTOSTERONE, TOTAL S... ☐ GRAM STAIN ONLY

Ordered Test   Code   PSC

1

Delete All Tes...   **Test Catalog**
Tubes/Containers   Cancel   Continue >>

2

Lookup Test By

3   ○ Code ⦿ Name ○ Mnemonic Clear   Selected Profile [   ]
Test Name [   ]   Component [   ]

Test Name [   ]   **4**   Test Code [   ]

Test Info | Test Specimen | Test Results | Test Questions | Test Schedule | Tech Info | Other Info

Ordering Lab [   ]   Active Date [   ]   ☐ Active
Performing Lab [   ]   Inactive Date [   ]   ☐ Billable
Accession Group [   ]   ABN Price [   ]   ☐ Scheduled
Blinding Level [   ]   ☐ Pathology
    ☐ Not Orderable

When Ordering, this Test Requires: LCD/NCD Failure Type [   ]   Applicable Gender [   ]
☐ A Separate Lab Order
☐ A Separate Accession Number   Test Can Be Ordered [ ] Times
    Within [   ] [   ]

View Test Print Test View Test Pricing Report External Catalog   Add Test to Order   OK

5

View and Print Lab and Historical Reports

1   Open the **Lab Reports** Screen from the Results menu.
2   Click on the **Filter Criteria** link to begin a search.
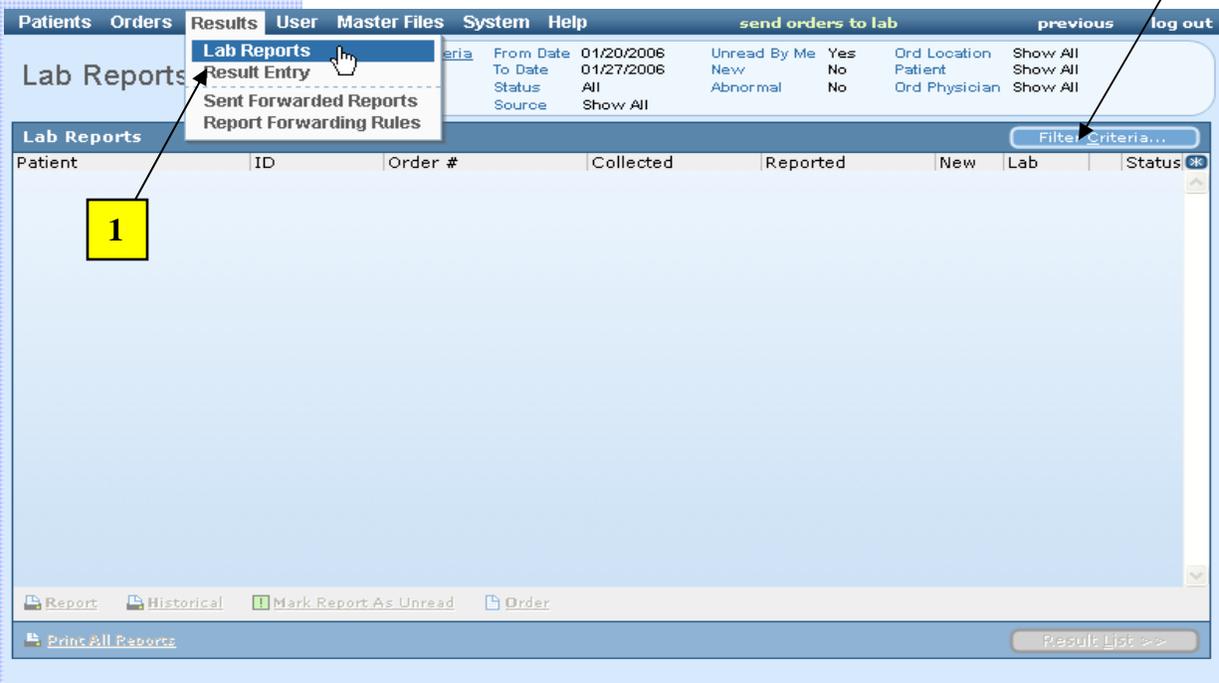
3   **Search** for the desired report using any of the provided criteria: Patient Name, Ordering Location, Date, Report Status, Source, Physician

4   Select how results will be **displayed**: Unread by Me, New (no one has read), Abnormal

5   **Sort** results by: Patient or Report Date

6   Click **OK**.

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View and Print Lab and Historical Reports

Patient	ID	Order #	Collected	Reported	New	Lab		Status
Neeley,Thomas Andrew	987654321	00LTS120000051	01/27/06 14:21	01/27/06 14:15	X	1	C	Part.

7 Report **Historical** Mark Report As Unread **Order**

Print All Reports

9 **10**

8

Report   Historical   Mark Report As Read   Order

Print All Reports   Result List >>

---

7   To view and print the report, click the **Report** link.

8   To print all the reports found, click **Print All Reports**.

9   To view and print all previous reports for the same test, click the **Historical** link.

     Example: a historical report can show all of a patient's cholesterol test results.

10   To view the original order, click **Order**.

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Print Cumulative Reports

1 Select the desired patient record.

2 **Click** Cumulative Reports.

3 Select printing options:
- -Paper Orientation
- -Result Order
- -Order Date Range

4 Select which results to include in report:
- -All Results
- -Results from List Template, which confines report to specified results (See next section **to Define a List Template**)

5 Click **View** to see an electronic version of the report.

6 For a paper copy, click **Print**.

Tip: Entering Dates Faster

▶ Type the letter "t" in a date field and LabWorks will automatically fill in today's date.

▶ To search for days after today, type **"t+(number of days)."** For example, a month from today would be "t + 30."

▶ To search for days before today, type **"t-(number of days)."** For example, a week ago would be "t - 7."

Define Result List Template
for: Cumulative Reports

1 Select a patient record.

2 Click **Cumulative Reports**.

3 Click the **New Result List Template** link.

4 Click the **New Template** link.

5 Name the template.

Use a name that will signify how the template will sort lab results.

Example: Blood Culture, if the template will find all Blood Culture reports.

6 Click **Save Template**.

7 Click New Result Code.

8 Select the term that will be used to filter the results. Use either a **test code** number or the **drop down** menu.

9 Click **Save Result Code**.

10 Click **OK** when the Template is complete.
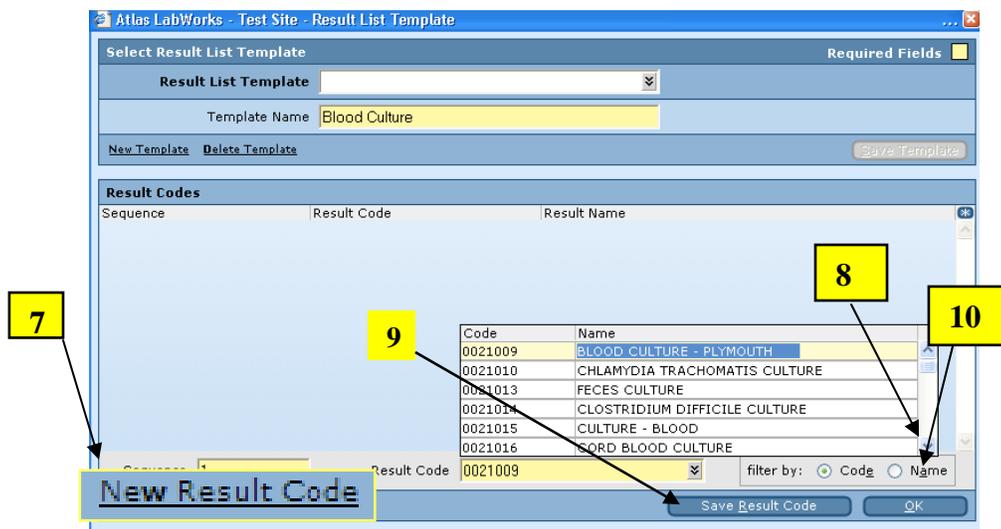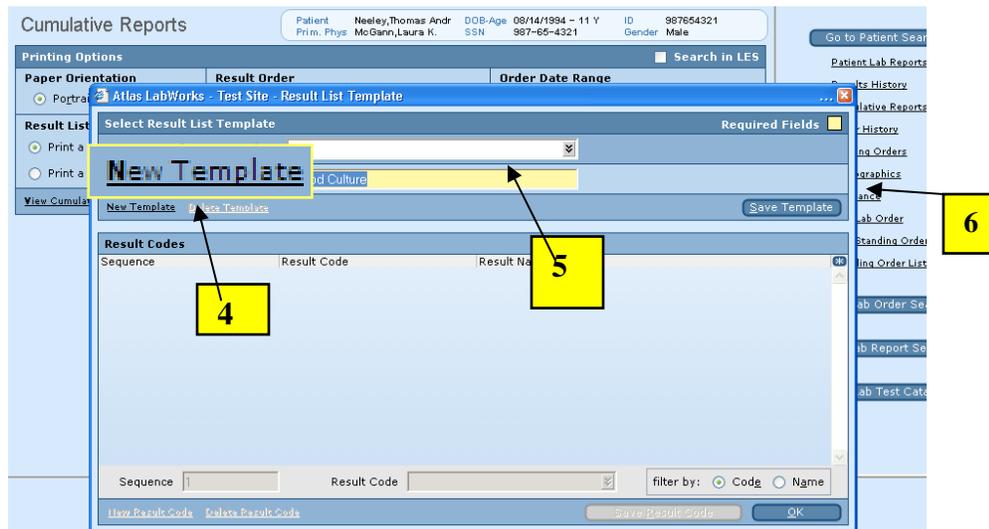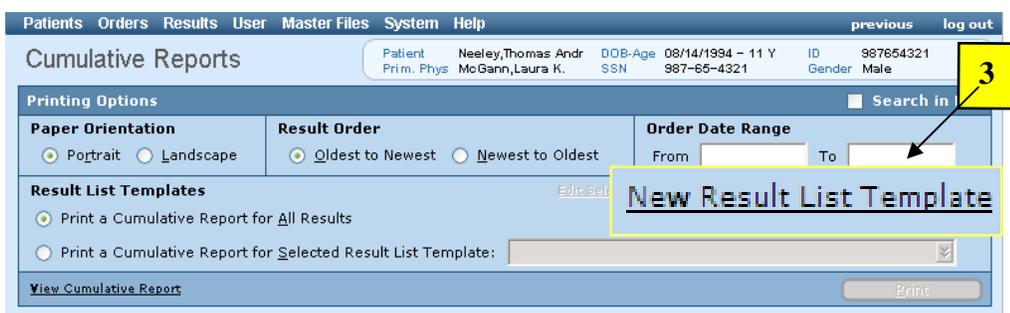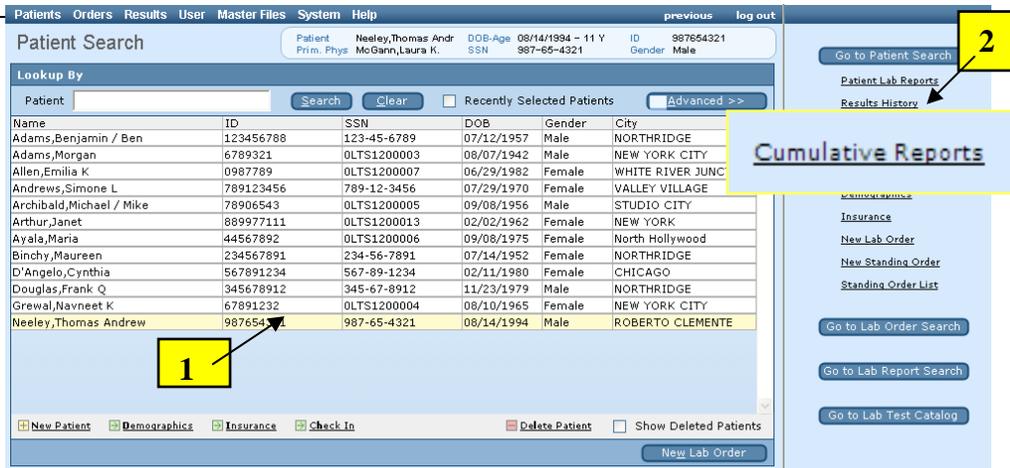
1. Select a patient record.

2. Click **Results History**.

3. All of the patient's results will appear.

4. To see an individual result, select the desired test and click **Result Detail**.

5. Click the **Chart Results** link to see results in chart form.

Find a Manifest

1

1. Select **Manifest** from the Order menu.

| Patients | Orders | Results | User | Master Files | System | Help | | previous | log out |

Orders menu:
- Lab Order Search
- Scheduled Orders
- Phlebotomist Draw List
- Standing Order List
- Order Approval
- Order Approval Maintenance
- Manifests
- Utilization
- Exception Report
- Lab Test Catalog
- Supply Orders
- Medical Necessity Verification

Patient... | Patient / Prim. Phys | DOB-Age / SSN | ID / Gender

Lookup

Patient | Search | Clear | ☐ Recently Selected Patients | Advanced >>

Name | SSN | DOB | Gender | City

➕ New Patient ➡ Demographics ➡ Insurance ➡ Check In   ➖ Delete Patient ☐ Show Deleted Patients

New Lab Order

2

2. Search for a manifest by:
   Manifest Number
   Date (From – To)

3. Select the desired manifest.

4. To print the manifest, click the **Manifest** link.

5. To print the manifest labels, click the **Print Labels** link.

| Patients | Orders | Results | User | Master Files | System | Help | | previous | log out |

Manifests

Manifest Search Criteria

Manifest Number [   ]

From [   ]   To [   ]   ☐ New Search Clear

Date	Time	Sent To	Manifest #	New
01/27/06	14:00	South Bend Medical Foundation	3	No
01/25/06	15:43	South Bend Medical Foundation	2	No

3

🖨 **Manifest**   🖨 **Print Labels**

🖨 Manifest List   ➡ Manifest Layout   🖨 Manifest   🖨 Print Labels

Print Coalesced Manifest | Print All Manifest

4   **5**

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LabWorks keeps a record of all placed orders.

1. Select **Lab Order Search** from the Order menu.

2. All completed orders will appear in the **Orders** grid.

3. Multiple criteria are available to search for an order.

4. Results can also be filtered by:
    Pending Results
    Never Printed

5. If the order is still pending, click the **Pending Tests** link to see all pending orders.

6. Select the desired order.

7. To **print** the Order Report or Requisition, use the Requisition and Order links.

8. To **edit** or **delete** an order use the edit or delete link.
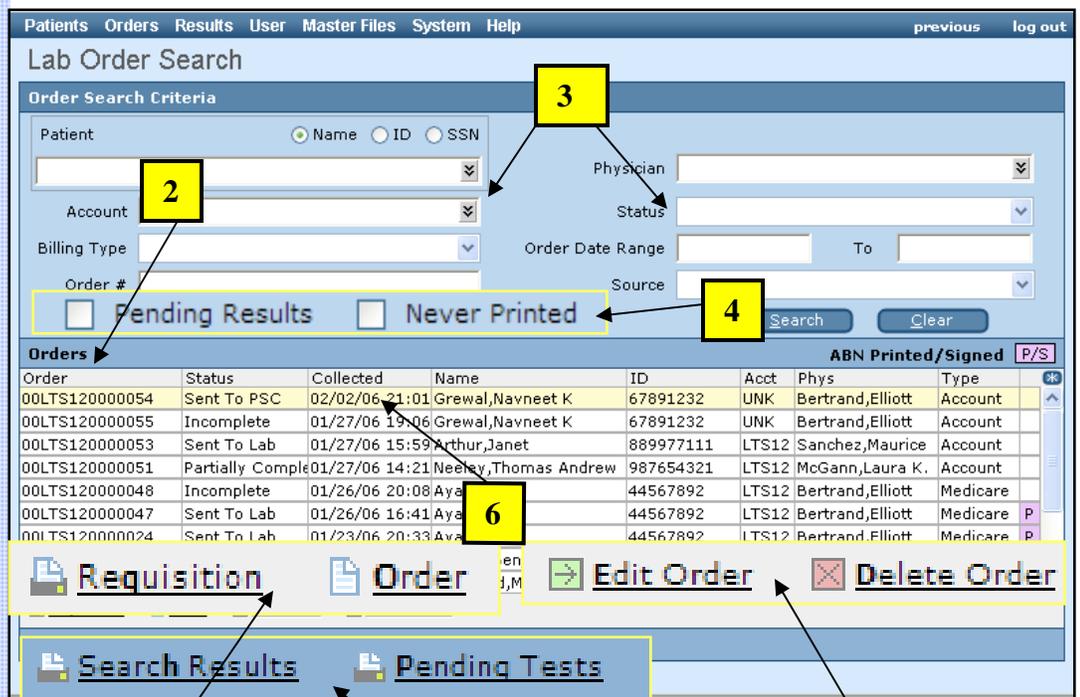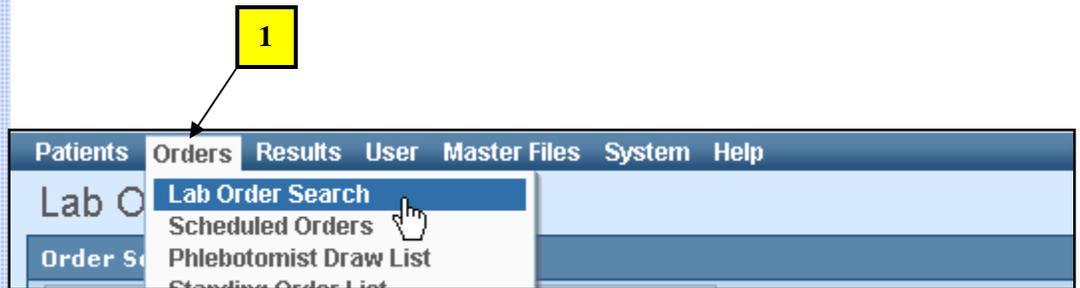
Patient Order History

1. Select the necessary patient record.

2. Click on the **Order History** link.

1

2

Patient Search				Patient Adams,Maureen DOB-Age 07/14/1952 – 53 Y ID 234567891
				Prim. Phys Bertrand,Laura K. SSN 789-12-3456 Gender Female

Lookup By

Patient A   [Search] [Clear] ☐ Recently Selected Patients

Go to Patient Search

Patient Lab Reports

Order History

Name	ID	SSN	DOB	Gender	City
Adams,Maureen	234567891	789-12-3456	07/14/1952	Female	Woodland Hi
Adams,Michael	78906543	543-07-8906	09/08/1956	Male	Woodland Hills
Allen,Janet	889977111	711-18-8997	02/02/1962	Female	Woodland Hills
Andrews,Morgan	6789321	210-06-7893	08/07/1942	Male	Woodland Hills
Archibald,Maria	44567892	892-04-4567	09/08/1975	Female	Woodland Hills
ATLAS,Benjamin	123456788	678-81-2345	07/12/1957	Male	Woodland Hills
Ayala,Emilia K	0987789	890-00-9877	06/29/1982	Female	Woodland Hills

Pending Orders

Demographics

Insurance

New Lab Order

New Standing Order

Standing Order List

[Go to Lab Order Search]

[Go to Lab Report Search]

[Go to Lab Test Catalog]

⊞ New Patient ⊞ Search In LES ⊞ Demographics ⊞ Insurance ⊞ Check In   ⊟ Delete Patient ☐ Show Deleted Patients

[New Lab Order] [New Standing Order]

3

3. All of a patient's orders will appear in the top grid.

      Double click an order to view and print a report.

4. The second grid shows the order's accompanying specimens. Click the **Specimen Label** link to print labels.

Order History				Patient Adams,Maureen DOB-Age 07/14/1952 – 53 Y ID 234567891
				Prim. Phys Bertrand,Laura K. SSN 789-12-3456 Gender Female

Orders for Patient Adams,Maureen   ABN Printed/Signed P/S

sort by ⦿ Order # ◯ Requisition #

Order #	Req #	Status	Collected	Ord Phys	Accn #	User	✱
00LTS120000006	4	Sent To Lab	01/01/06 21:43	Unknown,Elliott		McGann,Laura	
00LTS120000002	2	Sent To Lab	12/28/05 17:08	Bertrand,Laura K.		McGann,Laura	

Specimens for Selected Order

| Specimen #	Lab Receipt	Type	Container	✱
00LTS120000006-1		Aerobic (Blood (venous or	Aerobic bottle (part of 2-bot	
00LTS120000006-2		Anaerobic (Blood (venous	BCAnaerobic bottle (part of	
00LTS120000006-3		Culture Specimen	Sterile Container	

🖨 **Specimen Label**

4

Report Forwarding

1. Click the **Forward to Site** link below a selected report.

2. If the link does not appear, roll the mouse over the icon in the grid's right corner to find the link.
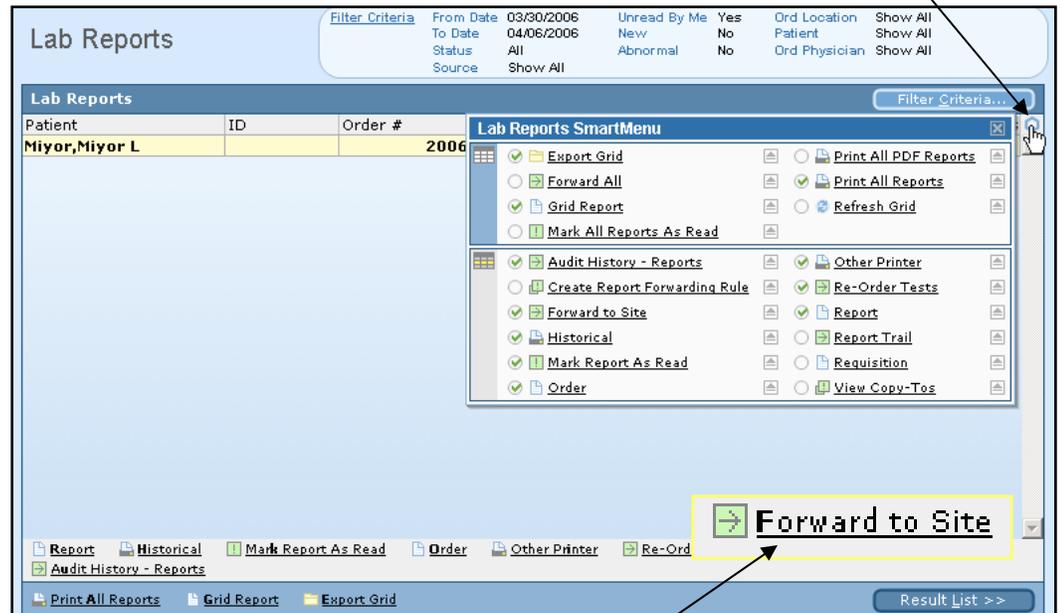

3. Click the **New Site** link.

4. Select the site where the report should be sent from the drop-down menu.

5. Click **Forward Report to EOS**.

6. Click OK.
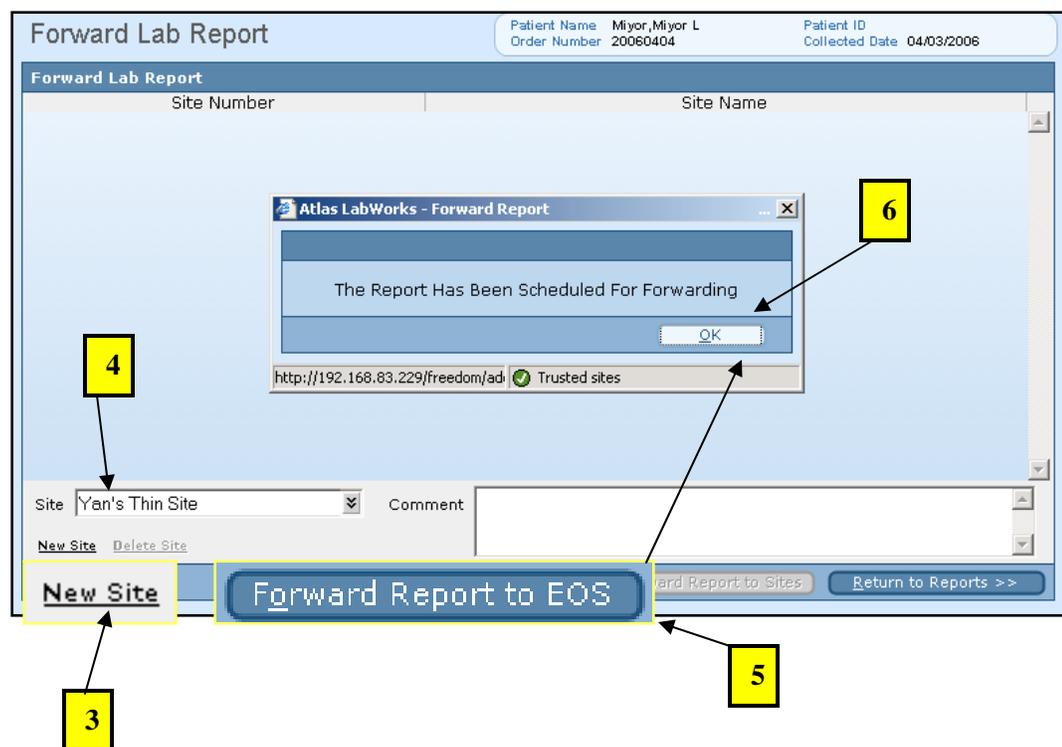
The Utilization function allows users to review and print statistical reports on the types and number of tests that have been ordered.

1. Click **Utilization** under the **Orders** menu.

2. Select the desired test.

3. Narrow search, if desired, by **Lab**, **Account**, **Billing Type** or **Physician**.

4. Indicate a **Minimum Frequency** (times a test was ordered) or a maximum number of rows using the **Max Display** feature.

5. Click **Search.**

6. To view the report click **View List**.

7. Click **Export List** to view an excel spreadsheet of the results.

8. Click the **TAT** link to view or print the Turn Around Time report.

9. Click Print List for a paper copy of the report.

10. To save the search performed, label it in the **Query** field.

11. Click **Save**. This will allow users to use the identical criteria in the future.
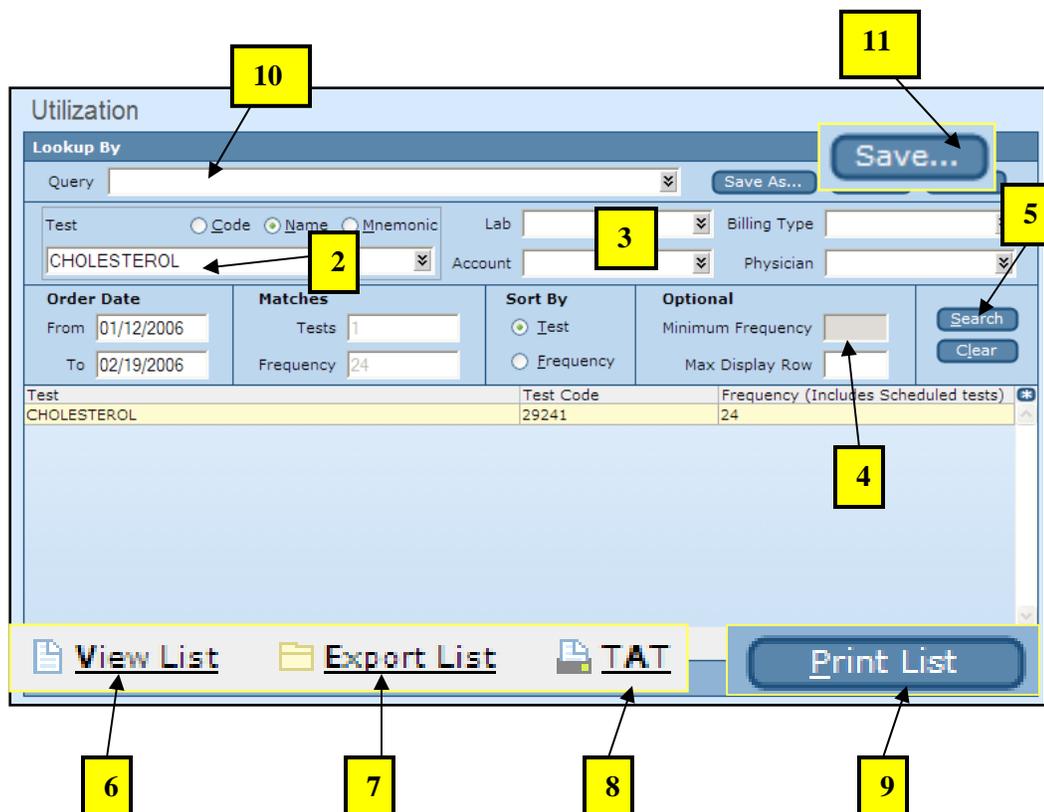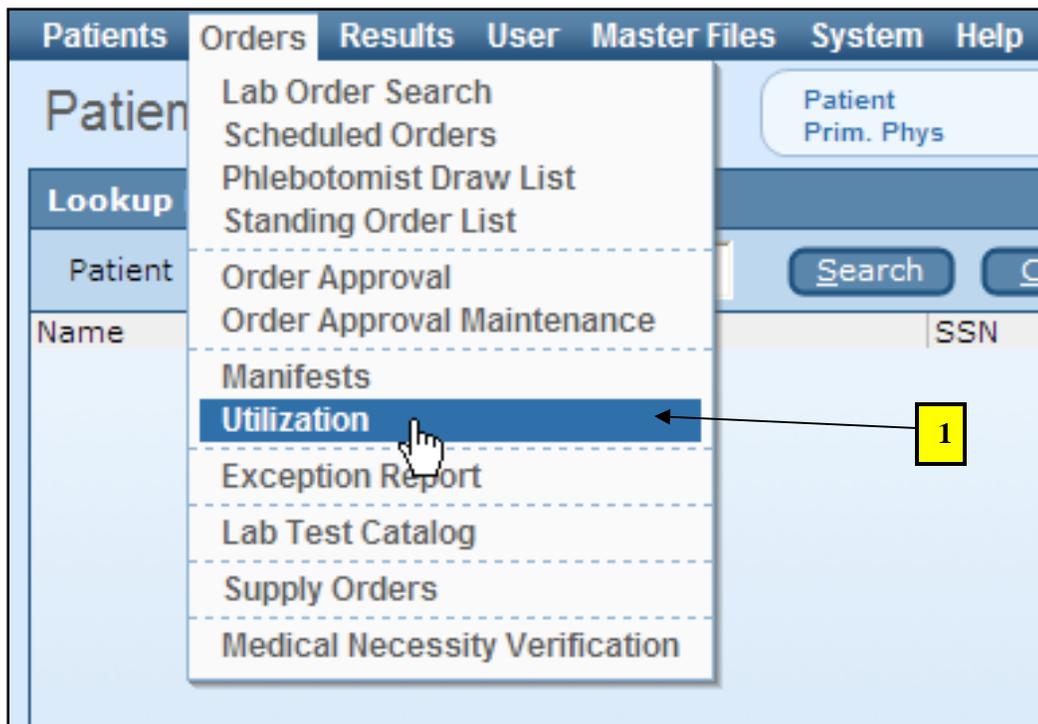
Change Password

Be sure to log in to the site being edited.

1. Select **Change Password** under the **User** menu.
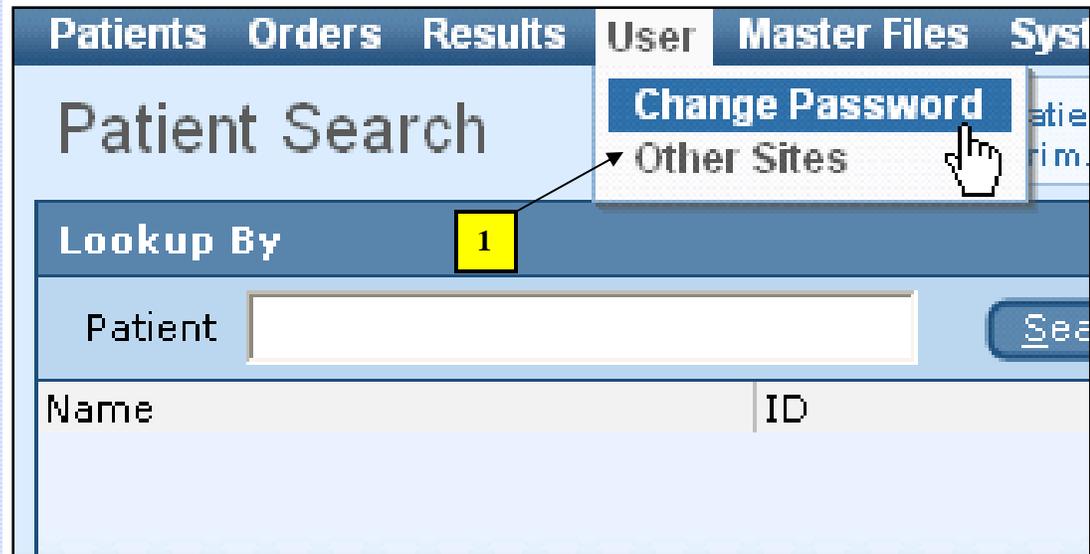
2. Enter the **Old Password**.

3. Enter a **New Password**.

4. **Confirm** the new password by entering it again.

5. Click **Save New Password.**
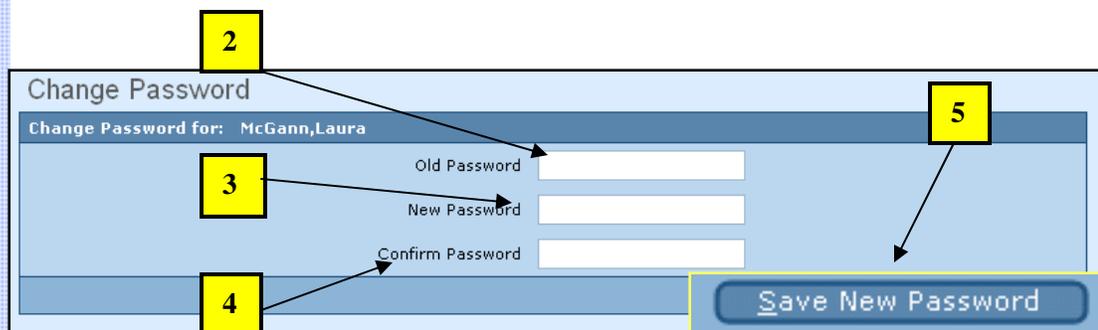
Switch to Other Sites

1. Select **Other Sites** under the **User** menu.
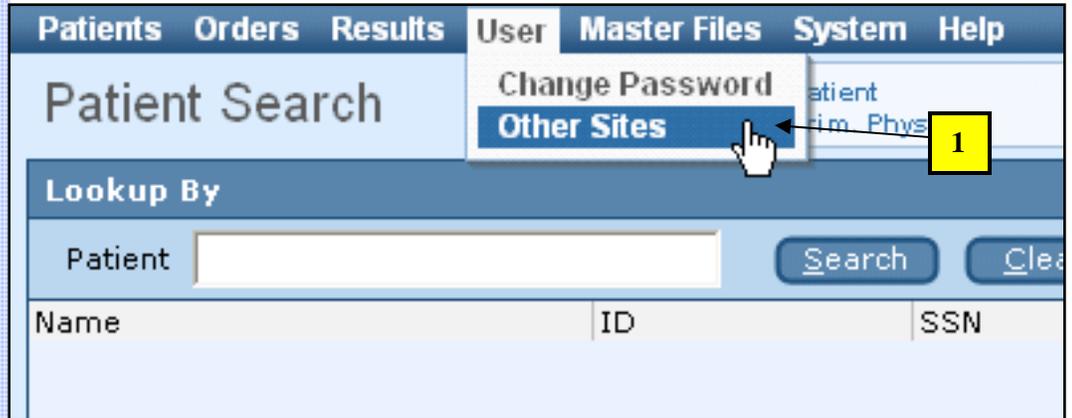
2. Select the desired site.

3. Click **Change**.
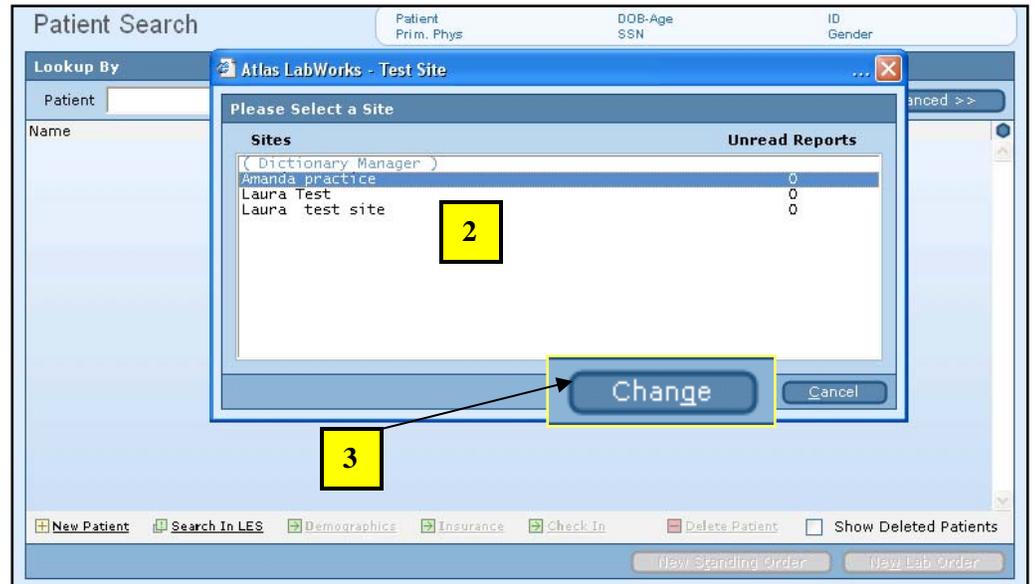
Regional Pathology Services

LabWorks User Guide

-APPENDIX-

A   LabWorks Help Tools
B   Results Quick View

Appendix A

Lab Works Help

Roll Over Arrow

1. When the mouse rolls over a bottom-row link, an arrow will usually appear to the right of the link.

2. Rolling over the **arrow** will reveal a dialog box that provides helpful tools.

Example: the Order link on the Standing Order List screen provides a link to additional **information.** The arrow also provides links to **view** and **print** order.

3. The information link brings up a box explaining the link's function.
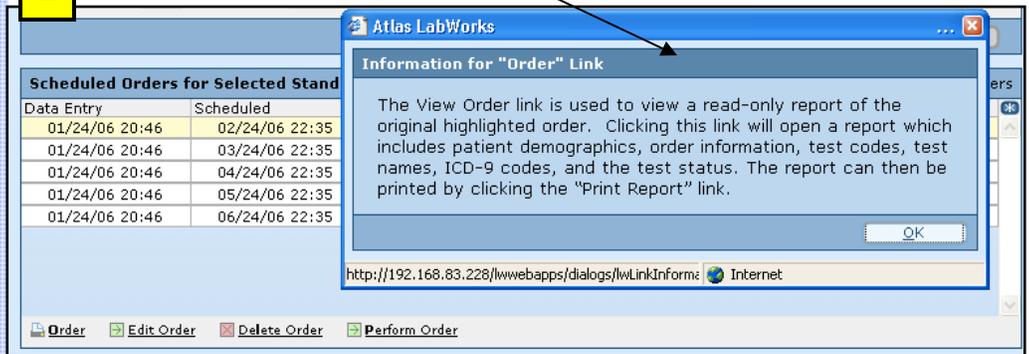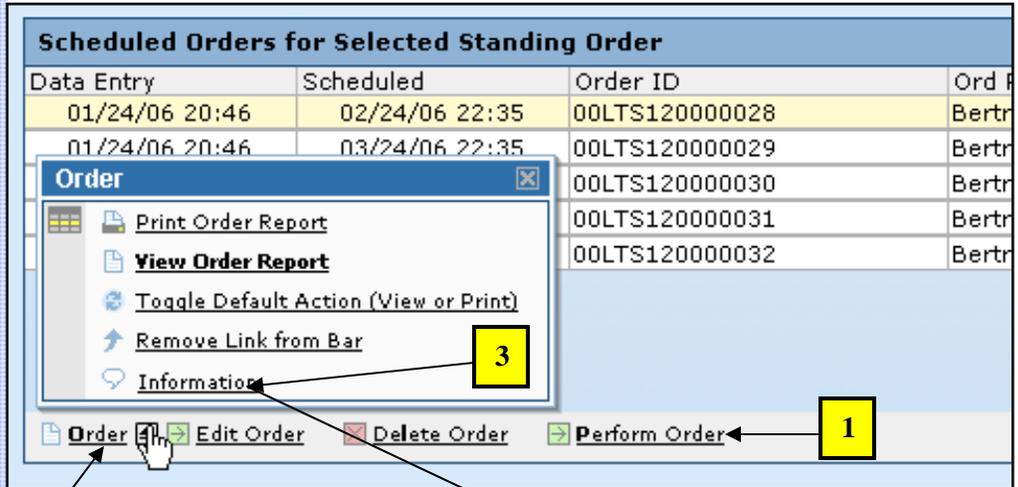
Help Menu

4. Select Help from the dropdown help menu.
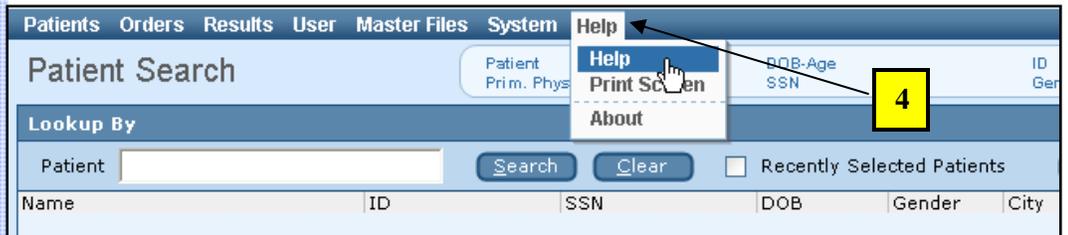
5. A help page will appear with links to explanations on how to perform LabWorks tasks.
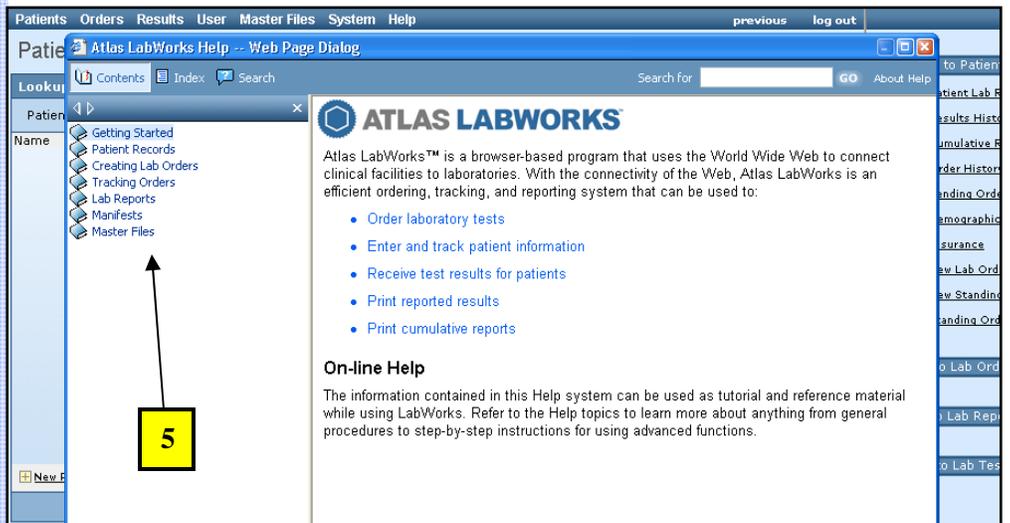
Results: *Quick View*

Step 1: Search Lab Reports
Click **Lab Reports** on the Results menu.
Select a report on the list and then click the **View Report** or **Print Report** link.
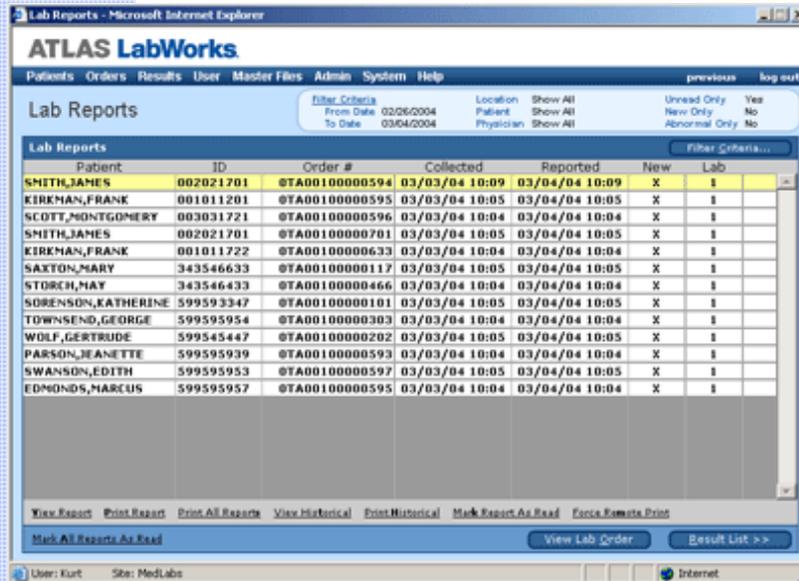
To review only the results in a report, select a report on the list and then click the **Result List** button.

Step 2: Modifying Filter Criteria

Click on the **Filter Criteria** button on right side of screen.

Modify Filter Criteria by changing or searching on any of the following fields or combination of fields: Patient Name, Ordering Location, Reported Date Range, or Ordering Physician

The reports are further filtered by the displaying criteria: Read, Unread, or Abnormal
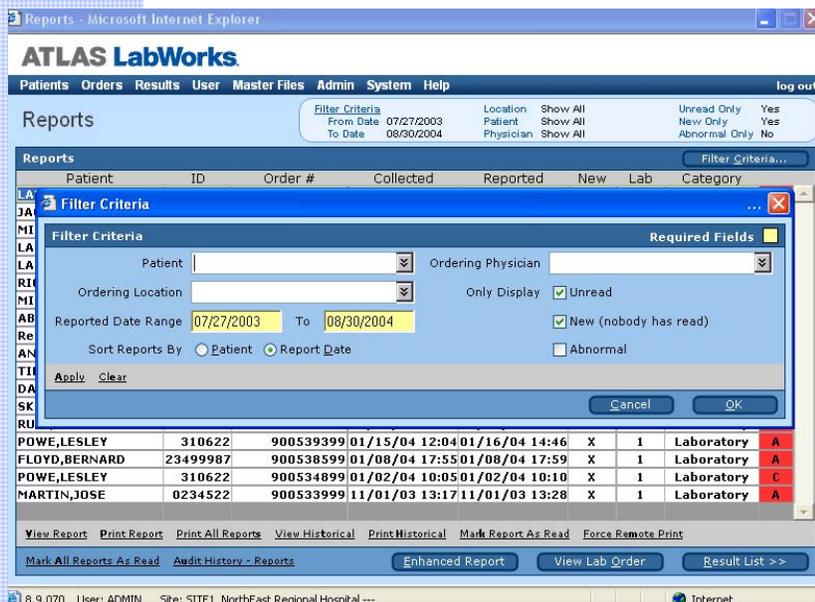
Click the **Okay** button and results will be displayed based on the new criteria.