

**Beaumont**

BEAUMONT HEALTH SYSTEM

# ATLAS

## Version 19 - User Guide

Electronic Inbound Orders  
August 2016

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## About this User Guide

This document serves as an instructional reference for Atlas Version 19 with Patient Centric Repository and electronic inbound order placement. Information new to customers already using the Atlas web portal system is highlighted in yellow.

## What is Atlas?

Atlas is a web-based system used to connect clinical facilities to medical laboratories. The Atlas system provides users an electronic method of placing laboratory orders, entering and tracking patient information, receiving patient laboratory reports and printing those reports in both individual and cumulative formats. In the system setup which includes access to the Patient Centric Repository, clients have access to the entire Beaumont patient database from which they may locate their patients. This enables the Atlas system to become a dynamic component of the Patient's medical record by incorporating the office laboratory orders into a single ongoing record of the patient's laboratory testing rather than a series of individual, unrelated order events in the lab system.

## PC and Browser Requirements

The Atlas system requires MS based Operating Systems of Windows 7 or later. Browser requirement is Internet Explorer version 9 or later. Atlas does not support iOS (Apple) or other operating systems and does not function fully with browsers other than Internet Explorer (Chrome, Firefox, etc.)

### Active X/Pop-up Blockers

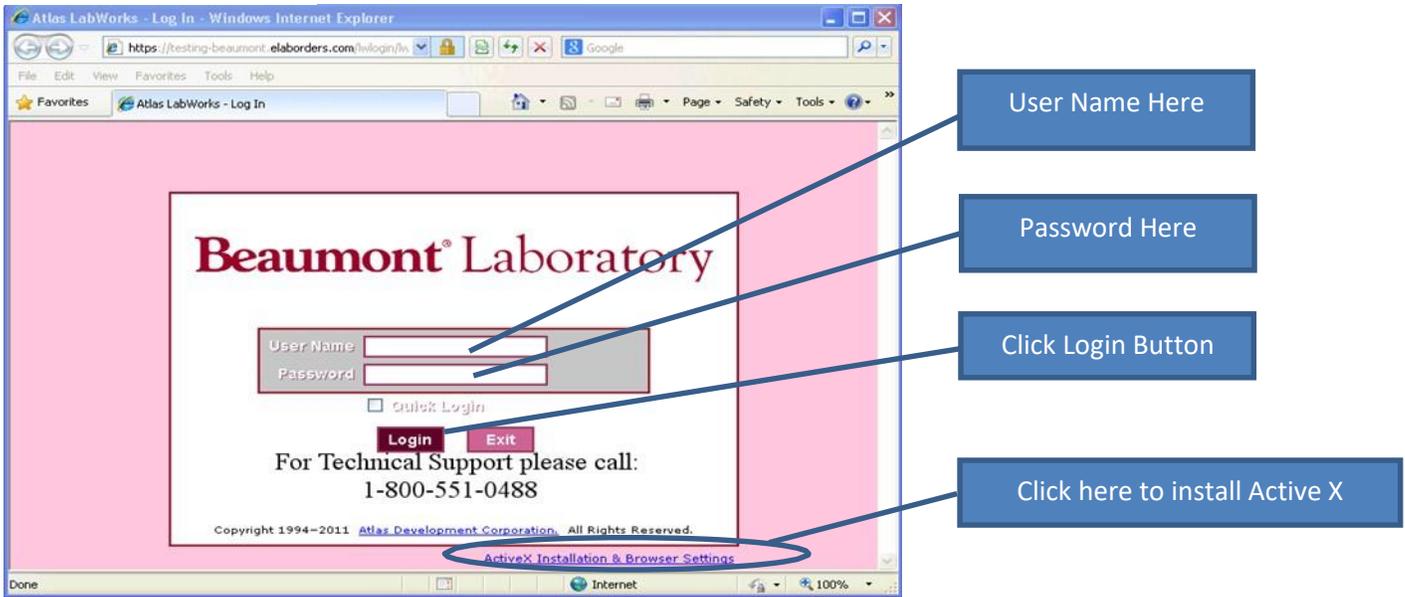
Atlas requires the user to have ActiveX installed on the user's PC; the ActiveX application can be installed from the log-in screen of the Atlas application.

Pop-up blockers must be turned off or set to "allow pop-ups from this website" to allow the Atlas system to function.

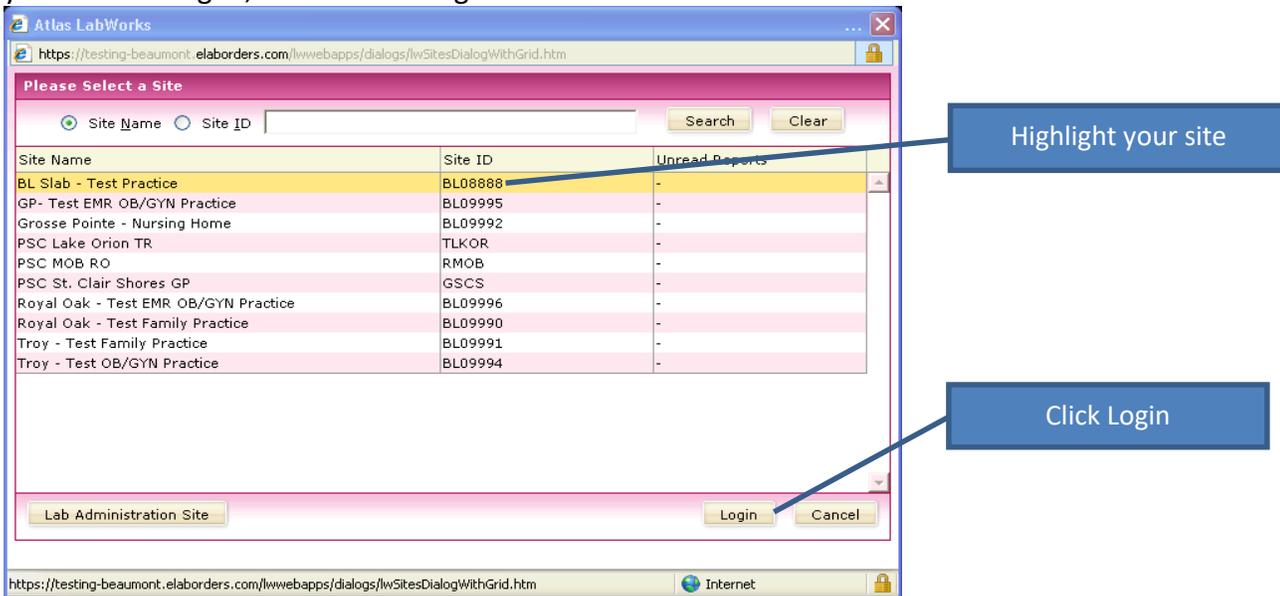
## Logging In

You will be provided with your user name and password, enter this information into the user name and password fields of the login screen and click the login button.

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If there are multiple offices associated with your practice, the *Select Site* screen will display, click on the site you are working at, and click the login button.

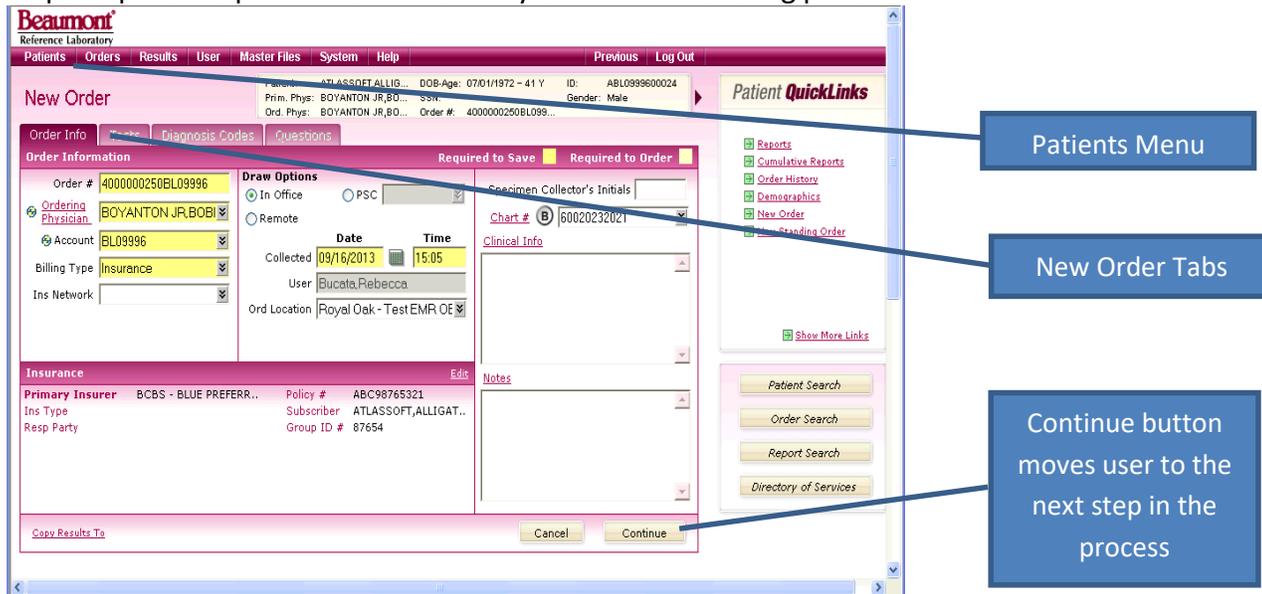


## Navigating Through Atlas

The system is divided into screens of drop down program menus, some of which consist of multiple tabs. The program menu bar provides access to the option categories available to the user. Moving the mouse over the menu bar reveals drop down menus. Mouse over the menu you wish to access and click on the function you wish to utilize.

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Here the *New Order* screen from the *Patients* Menu is displayed showing the multiple tabs that compose the steps required to place a new laboratory order on an existing patient.



## The Program Menus

### Patients

Select options for editing patient demographic information, ordering tests, creating cumulative reports, and other tasks related to patient records. Some menu items are only available after a patient record is selected.

### Orders

Select options for creating a **New Lab Order**, performing a **Lab Order Search**, **Test Utilization**, and **Lab Test Catalog** Access.

### Results

Select an option to open the *Lab Reports* screen for reviewing or printing lab reports.

### User

Select this option to access **Change Password** function.

### Master Files

Select options for adding or editing information in **Insurance Providers**, **Physicians**, and **Short List**. (Access to the **Master Files** menu may be restricted to client supervisors and/or system administrators.)

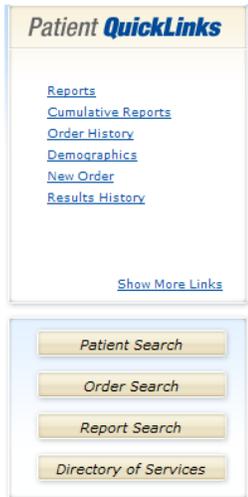
### Help

Open the **Help** system to check the program version information, view the End User Guide, ActiveX Installation & Browser Settings, as well as a link to the web based help lexicon.

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## Quick Links

The Quick Link option on the right side of the screen offers quick and convenient links to key areas of Atlas. The upper portion of the quick link menu includes links to Reports, Cumulative Reports, Order History, Demographics, New Order, and Results History on the selected patient; while the lower section contains links to menu options Patient Search, Order Search, Report Search, and Directory of Services.

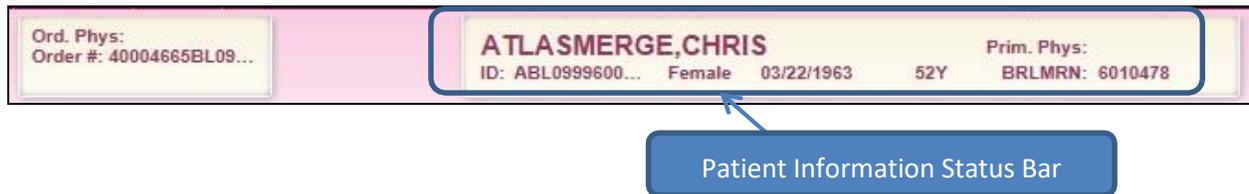


Upper portion of Quick Link menu contains links to items related to the selected patient

Lower portion of Quick Link menu contains links to menu functions

## Patient Information Status Bar

The *Patient Information Status Bar* near the top of the page provides important information about the patient record being viewed. Information includes: **Patient Name**, **Date of Birth (DOB-Age)**, **Identification (ID)**, **BRL MRN**, **Primary Physician (Prim. Phys.)**, **SSN (Social Security Number)**, and **Gender**.

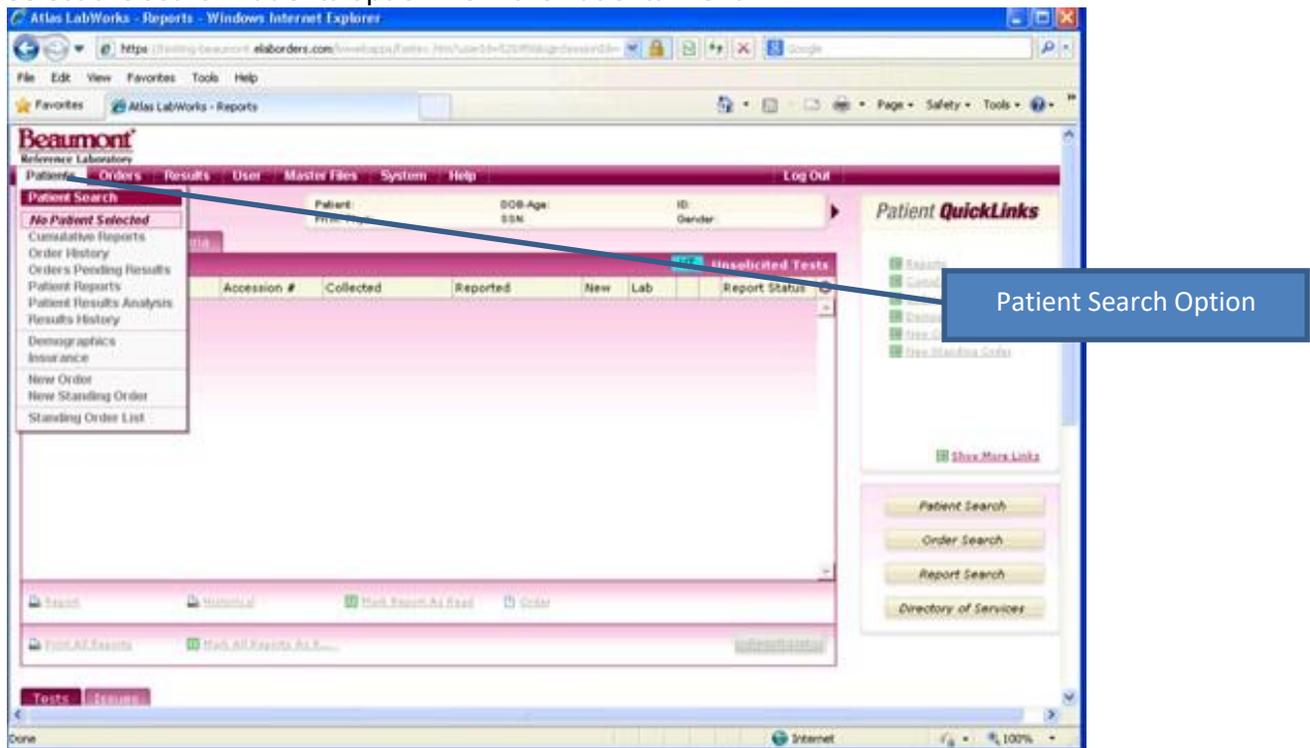


## Finding your patient in Atlas PCR:

The Patient Centric Repository (PCR) is a compilation of the patients who have utilized the Beaumont Healthcare System. When a Atlas request to retrieve the patient data from the PCR is processed, Atlas pulls the selected patient demographics and insurance information from the PCR files into the client's Atlas account files. The user must verify the demographic and insurance information and in the case of nonmatching information either update their account's files to match the PCR data or proceed with non-updated data. In order to maintain integrity in the PCR, users cannot edit information contained within the PCR.

### 1. Access the patient file, verify demographics and insurance:

Select the *Search Patients* option from the *Patients* menu.



“Patients” menu has an option to go directly to creation of a new patient:



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Type the patient name (Last, First) into the *Patient* field of the *Lookup By* screen and click the *Search* button

Last Name Here  
Then Click  
Patients who match the last name display here  
Existing patients should always have a BRL MRN# - if missing, reacquire the patient from the PCR. (you may have to perform a patient file merge)

BRL MRN#	Name	SITE PID	DOB	Gender	City	Primary Physician
6004160	ATLASSOFT,A	ABL0999400024	07/01/1970	Male	GARDEN CITY	
6004160	ATLASSOFT,AARON	ABL0999404451	01/01/1974	Male	TROY	
6002023	ATLASSOFT,ALLIGATOR	6002023	07/01/1972	Male	GARDEN CITY	
6002891	ATLASSOFT,AMY	ABL0999400106	08/01/1980	Female	TROY	
6004051	ATLASSOFT,ANT	ABL0999404440	01/01/1970	Female	TROY	
6001546	ATLASSOFT,B	ABL0999400025	07/02/1970	Female	TROY	
6004103	ATLASSOFT,BANANA	ABL0999404441	12/12/1981	Female		
6004103	ATLASSOFT,BANANA	ABL0999404442	12/12/1981	Female		
6004164	ATLASSOFT,BETHEL		12/12/1981	Female	ANN ARBOR	
6002892	ATLASSOFT,BETTY	ABL0999400107	08/03/1981	Female	TROY	
6002024	ATLASSOFT,BUTTERFLY	ABL0999400005	07/02/1972	Female	TROY	
6001547	ATLASSOFT,C	ABL0999400026	07/03/1970	Male	STERLING	
6002025	ATLASSOFT,CATERPILLAR	ABL0999400006	07/03/1972	Male	ROYAL OAK	
6002893	ATLASSOFT,CATHY	ABL0999400108	08/03/1983	Female	TROY	
6004173	ATLASSOFT,CLAUDIA		12/12/1982	Female	Nor	

The Atlas system will display a list of all patients in the system matching that name. In the below example we are searching for patient **Atlassoft, Caterpillar**. Select the correct patient by double clicking on the patient listing. This will bring up the patient demographics screen.

**\*\*\*Note: Existing patients should always have a BRL MRN# display in the patient search data. If your patient is in your client files, but is missing the BRL MRN#, it may be due to a file merge performed in the hospital information system. For step by step instructions on how to deal with merged records within the Atlas system, please see the section on "Merging Patient files in Atlas" located below in this user guide.**

If the correct patient is not found, a prompt displays asking if the user wishes to search the PCR for the patient.

Answer Yes to the "Do you want to search PCR?" question

Click on the YES button to open and search the PCR for your patient. A box will display with patients whose names match your search. Select the correct patient by matching **Last Name, First Name, Date of Birth, and Gender**, or select the patient, click on the line containing the correct patient information to highlight and then click the *Acquire Patient* button.

Name	MRN	DOB	Gender	PCR ID	City	Phone Number
ATLASSOFT,A	6001545	07/01/1970	Male	ALES00848	GARDEN CITY	(735)5551212
ATLASSOFT,ALLIGATOR	6002023	07/01/1972	Male	ALES00948	GARDEN CITY	(734)5554321
ATLASSOFT,B	6001546	07/02/1970	Female	ALES00849	TROY	(248)1234567
ATLASSOFT,BUTTERFLY	6002024	07/02/1972	Female	ALES00949	TROY	(248)8984321
ATLASSOFT,C	6001547	07/03/1970	Male	ALES00850	STERLING HEIGHTS	(586)7183543
ATLASSOFT,CATERPILLAR	6002025	07/03/1972	Male	ALES00950	ROYAL OAK	(248)5551212
ATLASSOFT,D	6001548	07/04/1970	Female	ALES00851	ROYAL OAK	(248)9876543
ATLASSOFT,DEER / ATLASSOFT,D	6002026	07/04/1972	Female	ALES00951	ST HEIGHTS	(586)7181234
ATLASSOFT,E	6001549	07/05/1970	Male	ALES00852	CLINTON TOWNSHIP	(586)7771234
ATLASSOFT,EAGLE	6002027	07/05/1972	Male	ALES00952	CANTON TWP	(734)6651234
ATLASSOFT,F	6001550	07/06/1970	Female	ALES00853	TROY	(248)9874321
ATLASSOFT,FOX	6002028	07/06/1972	Female	ALES00953	ROYAL OAK	(248)5554321

Click on the desired patient to highlight and click "Acquire Patient" to select the patient file from the Patient Centric Repository.

If the correct patient is not found, they are not in the Atlas system, proceed to the **Entering a New Patient** section of this manual.

### Update Patient Information Notification - Comparing Site and PCR Patient Data:

At times, the information contained in the PCR will not match the information in the patient's account file. When this occurs a notification window will display listing both the PCR file and the account file information. The user has the choice of accepting an update of the account information from the PCR, or ignoring the mismatched information. Users cannot update PCR information; this must be done by the registration department of Beaumont Health System.

Verify the demographic and insurance information, if the PCR Demographics Information is correct, click on *Update* to update the information in the site database. **If the PCR Demographics Information is not the correct and most up to date information for the patient, click on *Ignore* to leave the site information unchanged, and make a copy of the patient's Driver's License or State Id card (if applicable) and insurance card and send the copy to the laboratory along with the patient's requisition and lab work.**

When PCR and site information for the patient file do not match this window displays. The mismatched information is highlighted. The user should verify the correct information with the patient, and if PCR information is correct update the site information by clicking the Update button.

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## Placing an order for an existing patient:

Placing an order on an existing patient consists of 6 steps –

1. Access the patient file from the *Search Patients* option of the *Patients* menu or select the appropriate patient from the PCR. Verify the patient demographics and insurance information.
2. Select the *New Order* process; complete the order info screen for the patient's order.
3. Select the tests to be ordered.
4. Select the appropriate diagnosis codes for the ordered tests.
5. Answer any additional questions associated with the ordered tests.
6. The order is automatically sent electronically to Beaumont Laboratory

### 1. Access the patient file, verify demographics and insurance:

Retrieve the Patient file from the account records or the PCR as detailed above, or if the patient does not exist in Atlas, follow the procedure titled *Entering a New Patient into the Atlas system*.

**\*\*\* Note: When updating address information, in order for the new information to save properly, update the Zip code first, then the City.**

### 2. Complete the order info screen for the patient's order:

The *New Order* screen will display. Verify and update the information on the *Order Info* tab as required, making sure to select the correct physician, billing type, and draw options information as needed. Click the *Continue* button to advance to the next step of the order process.

Verify and edit information on this screen as needed. Fields in yellow are required. Click the "Continue" button to proceed to the next step.

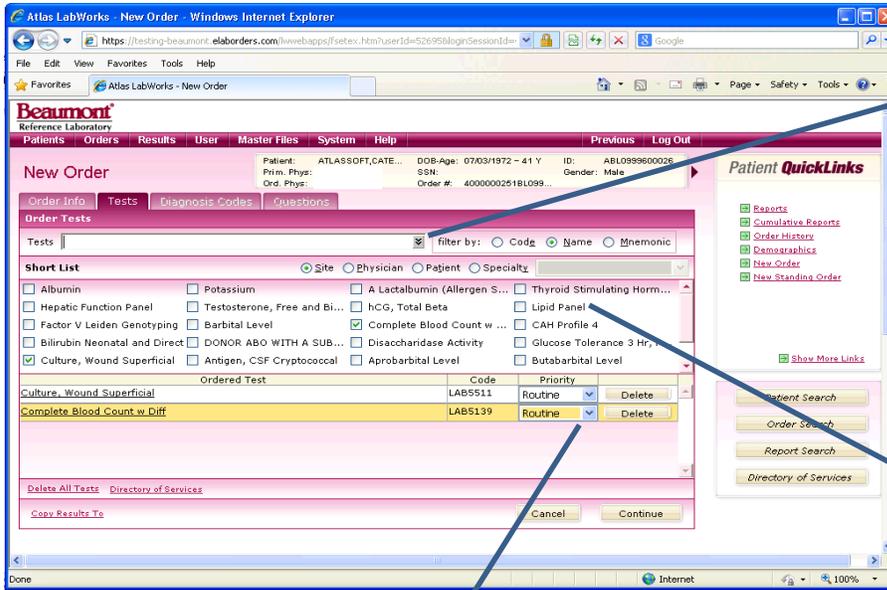
**\*\*\*Note: If you have added or changed staff within your practice, and find that not all of the Physicians in your practice are listed in the dropdown menu for "Ordering Physician" please follow the following steps to have the physician added to your Client Account setup:**

1. Choose one of the physicians on the dropdown list for use in completing the in progress order.
2. On the paper requisition, cross out the Doctor information and handwrite the correct information.
3. Call Beaumont Laboratory Client Service at 1-800-551-0488 and put in a request to have the Physician added to your Account Files.

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### 3. Select the tests to be ordered:

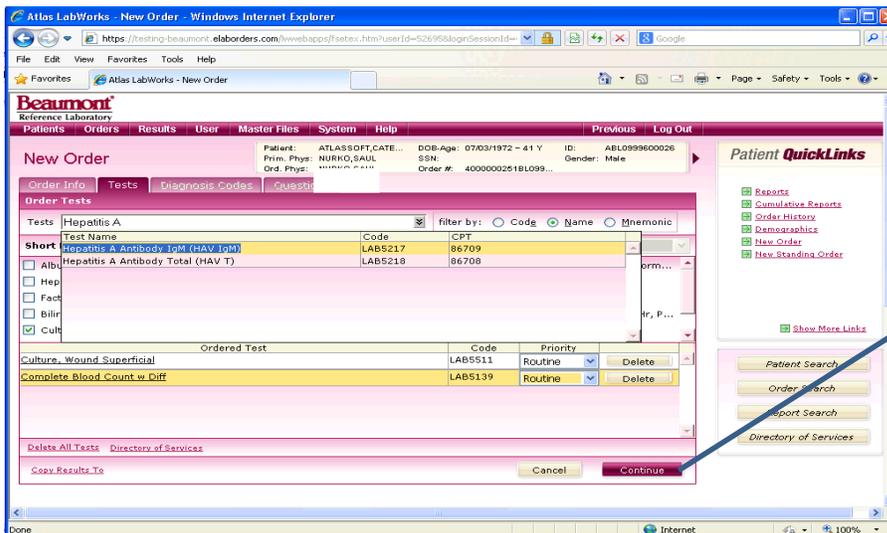
The *Tests* screen will display. Tests frequently ordered at this site display on the *Short List* section of the screen, other tests can be found by use of the search function. The user may search via “Code” (the EPIC test code), “Name” (the test name), or “Mnemonic” (the Soft test ID). For this example we will select *Name* as the search criteria, and type in the test name. A list of test options will display. Below we have selected the tests *Culture, Wound Superficial, and Complete Blood Count*. In the second screen we are searching for tests with the name *Hepatitis A*. once all the needed tests have been selected, click the *Continue* button to proceed to the next step. Select the test priority (routine or STAT) in the priority field of the ordered test display.



You can search for a test by typing in the test name here and clicking the downward arrow in the field. A list of tests matching the name will display.

You can select a test by checking off the box next to a test name in the Short List of tests. The Short List compiles itself based on the tests you frequently order. When you first begin to use the Atlas product the Short list will be empty and will build itself as you begin ordering tests on patients.

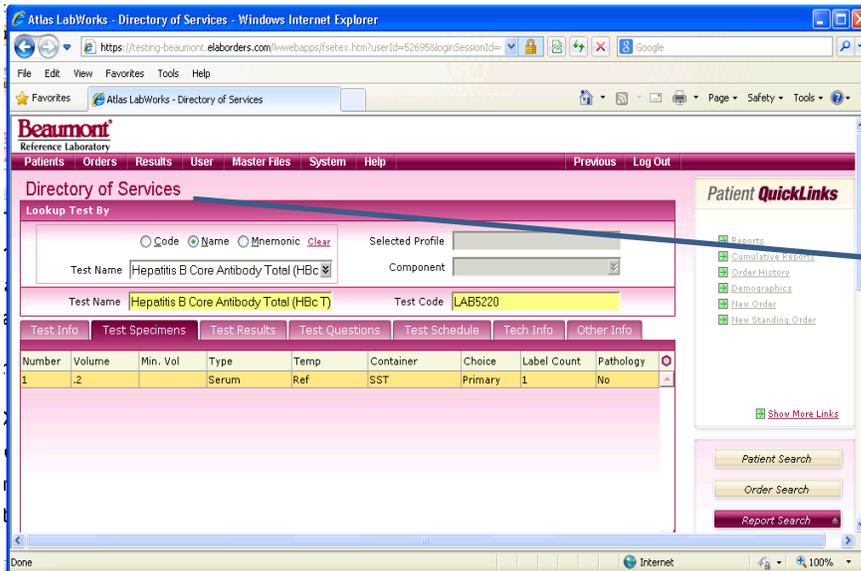
You can designate the test's order priority (routine, STAT) by selecting it from the drop down menu in the priority box.



Select the desired test by double clicking on the line. When all desired tests are in the “Ordered Test” pane, click “Continue” to move to the next step.

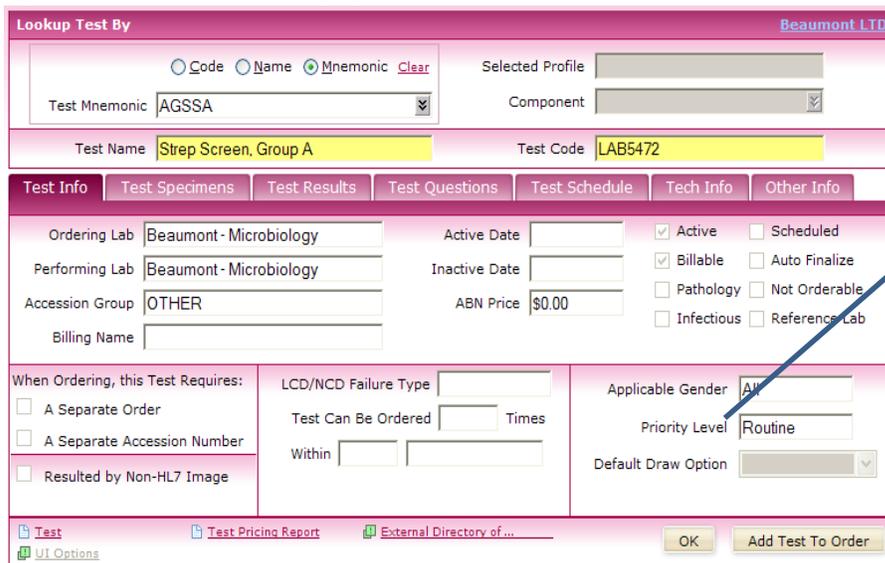
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At times, it may be desirable to determine the test specimen requirements, test name, schedule of testing in the laboratory, or other details regarding the desired test prior to placing a test order. These details can be found by searching the Directory of *Services* option found on the *Orders* menu. In the below example we have searched the directory of services for test names containing the word “hepatitis” and selected the test “Hepatitis B Core Antibody”. The *Test Specimens* tab in the directory of services for this test shows what the specimen requirement is, the type of container (tube), and storage transport requirements.



The “Directory of Services” can provide detailed information on the desired test such as the specimen collection and transport requirements

Once you have located the correct test, and reviewed the information you were seeking, you can click on the OK button in the pop-up message to close the pop up and on the X (close window) button in the top right corner of the *Directory of Services* screen.



Close the lookup test screen by clicking on the OK button and proceed placing your order.

If the user has doubts or needs further information on the desired test, they can also link to the **Beaumont Laboratory Test Directory** website by clicking the link on the top right corner of the selected test information. This will take the user to the **Beaumont Laboratory Website** and the **Laboratory Test Directory** where they may access fully detailed information on the test.

From the displayed information on the test selected in the Directory of Services screen, the user can directly access the Beaumont Laboratory website with the on-line Laboratory Test Directory. Click the link titled Beaumont LTD to access this feature.

**4. Select the appropriate diagnosis codes for the ordered tests:**

The *Diagnosis Codes* tab will display. Enter the appropriate diagnosis codes as selected by the ordering physician for the tests ordered. You can search for the needed diagnosis codes by the “Code” (the actual ICD9 code), the “Name” (the diagnosis code description), or a “Mnemonic” (a common term or abbreviation) for the code. In the view below we are searching for a code for “Jaundice”. Once you have selected all the appropriate diagnosis codes click the *Continue* button to proceed.

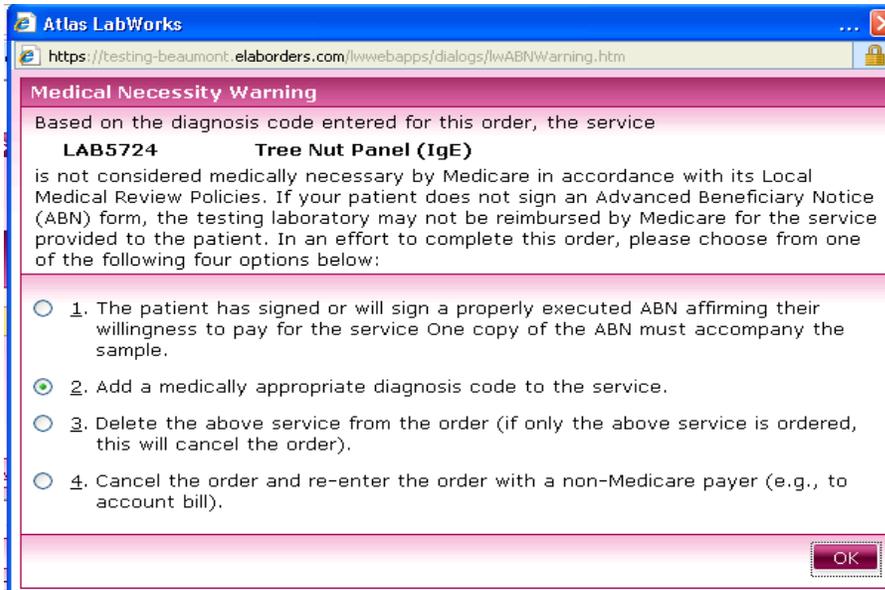
Search for a diagnosis code by entering the diagnosis name in the field and clicking the downward arrow, a list of codes matching the name will display, click on the correct diagnosis code to select

Just as the “Tests” tab has a short list of frequently ordered tests; a short list of frequently used diagnosis codes will auto compile. You can select from these codes by checking the box next to the code.

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## Advance Beneficiary Notice (ABN)

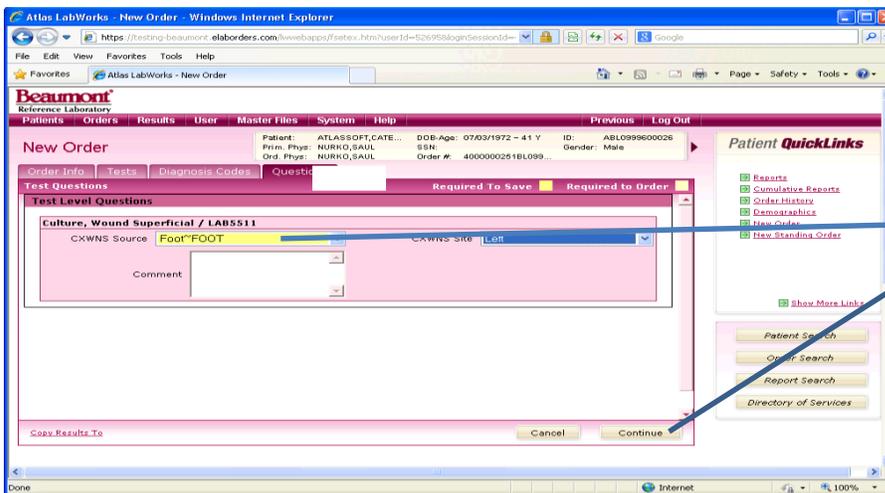
Some tests are not covered by Medicare, or other patient insurance programs, or provided diagnosis codes may not provide coverage for the selected testing. Ordering these tests may require that the patient be informed that the test may not be covered by their insurance. These requirements cause a notification screen to display where the user is instructed to have the patient sign the Advanced Beneficiary Notice (ABN) form (which prints along with the order requisition), select a diagnosis code that provides coverage for the testing, cancel the testing, or cancel the entire order. Select the appropriate option on the advisory box to continue.



The Medical Necessity Warning box advises the user to have the patient sign an ABN, select a diagnosis code that provides coverage, or cancel the test order. Select the appropriate option and click "OK" to continue

## 5. Answer any additional questions associated with the ordered tests:

Some testing requires that the ordering party provide additional information to the laboratory. These tests have order entry questions that display on the *Questions* tab. Complete any displayed fields on the *Questions* screen by selecting the information from the drop down lists, or typing the information into the available field. In the view below, the additional fields of Source and Site are displayed for the Culture, Wound Superficial order. We have selected the Source of "Foot" and Site of "Left" for this demonstration.



Fill in the required (yellow) fields plus any additional information you can provide. When complete click the "Continue" button.

## The Specimen Collection Instruction Screen

The Specimen Collection Instruction screen will display. This screen instructs the user what the correct specimens are for the ordered tests. Complete the specimen collection from the patient and click the *Close* button. The Print Labels box will display. Select the number of sets of labels you wish to print (default is 1) and click the *OK* button. A notification box will display to tell you if the order was successfully placed. At this point the order is placed, and cannot be edited or deleted. If the user needs to add further testing they must place a new separate order. To delete a test cross off the test on the printed requisition and make a note on the request that the test was ordered in error (if the work has already been sent to the laboratory, call customer service and request the test be cancelled). If the entire order is cancelled, discard the request form and do not send the specimen to the lab (to cancel an order that has been previously sent to the lab call customer service).

The screenshot shows the 'Specimen Collection Instructions' window in Atlas LabWorks. The window title is 'Atlas LabWorks' and the URL is 'https://testing-beaumont.elaborders.com/lwwebapps/dialogs/lwSpecimens.htm'. The window is divided into two main sections: 'Specimen' and 'Test'.

**Specimen Table:**

Order #	Units	Type	Temp	Container	# Labels	Patholo...	Lab
4000000251BL0	1.08	Whole blood	Ref	Lav EDTA	1	No	Beaumont Laborator
4000000251BL0	2	Serum	Ref	SST	1	No	Beaumont Laborator
4000000251BL0	1	Source	Rm	Sterile container	1	No	Beaumont - Microbio

**Test Table:**

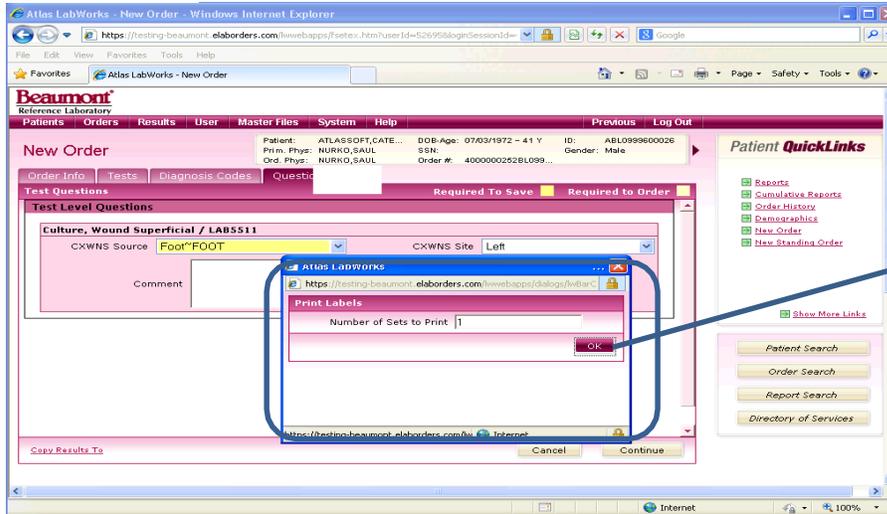
Test	Code
Complete Blood Count w Diff	LAB5139

A 'Close' button is located at the bottom right of the window. A blue callout box on the right side of the window contains the text: 'The Specimen Collection Instructions screen tells you what specimen is needed for each ordered test'.

## The Print Labels Box

In order to assure that minimal specimen requirements for all ordered tests are met, those tests which have specimen requirements that differ according to the performing laboratory location will print labels for the required specimen for each laboratory. To insure specimen requirements are met, clients should submit samples for each specimen label generated by the Atlas system. The system is set up to calculate required specimen volumes and combine tube types where applicable to minimize specimen collection wherever possible.

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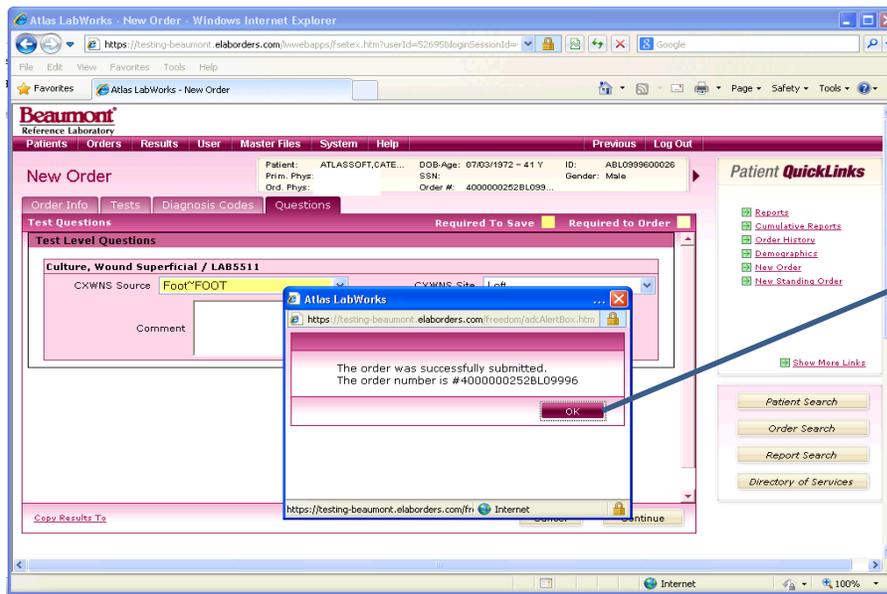


The Print Labels box displays and the user has the option to adjust the number of label sets that will print. Click the OK button to proceed, and the labels will print.

## Order Successfully Placed Notification and Error Messages

The final step of order placement is a pop-up notification that the order was successfully submitted.

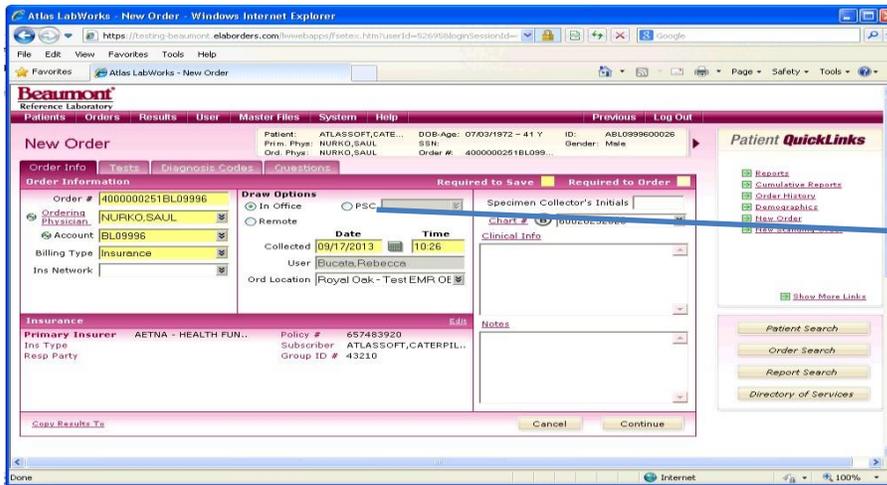
If an error has occurred in the order placement an error message will appear. Read the instructions, take the necessary steps to correct the problem and continue the process



A message box will display telling if the order was successfully submitted. If any error messages display, correct them by going back to the indicated screen (click on that tab) fix the issue and resume the process.

## Order Process for Clients who do not perform on-site specimen collection

If your office does not perform specimen collection in the office, the system will not be set to print labels. Clients who do not perform specimen collection in the office can print the test requisition and send the patient to an off-site Patient Service Center (PSC) for specimen collection. When beginning the order process, select the PSC button on the Order Info Tab. You can also specify the PSC location by selecting it from the dropdown box. If you select a PSC location a convenient map to the location will print along with the requisition forms.

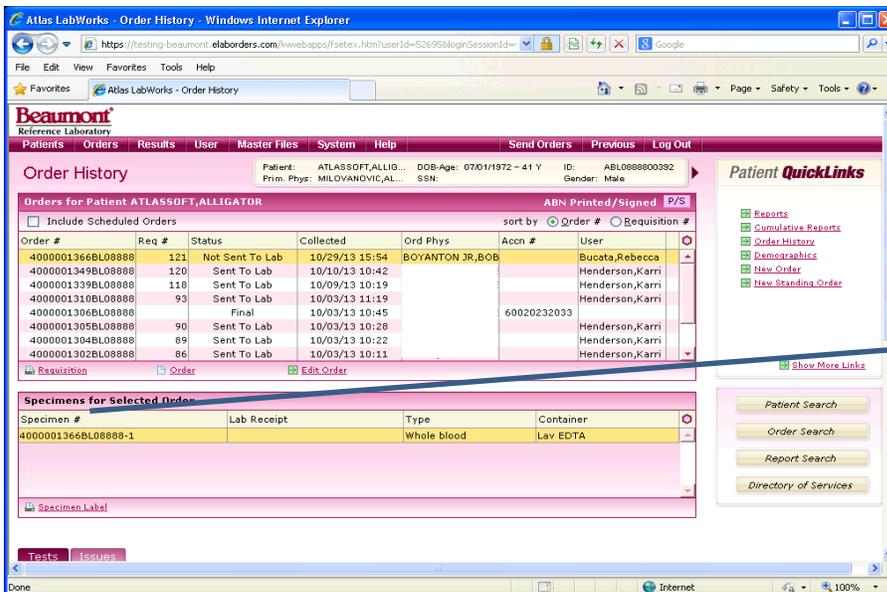


Select the PSC radio button if your office does not perform in-office specimen collection. You can also select a specific PSC location from the drop down menu.

### Printing or Reprinting the order requisitions:

Your account will be set up to automatically print the order requisitions, but should you need to reprint one or more requisitions, follow this process:

- On the *Patient Search* menu locate and highlight your patient and select *Order History*, then hit enter.
- Once the patient is selected, go to *Patients* and select *Order History*, and hit enter, the order history on that patient will display. Click on the order that you need to reprint the requisition for, it will highlight, and then click on the requisition icon. The requisition will be sent to the printer.



Reprint a requisition by accessing *Order History* for the selected patient on the *Patients* menu. Click to highlight the desired order and click on the requisition icon. The requisition will be printed.

New to the requisition forms is the Large Boldface Message **E-Order** in the upper right of the form. This is an indication to the lab that the order has been sent electronically and the form and accompanying specimens need to be matched up with the order already in the Laboratory computer system.

Client and Order	Physician	
Account #: <b>BL09996</b> Name: <b>Royal Oak - Test EMR OB/GYN Practice</b> Address: <b>123 Maple Ave West Bloomfields Twp MI 48073</b> Type: <b>Insurance</b> Collected: <b>03/05/2014 13:29</b> Order: <b>03/05/2014 13:29</b> Requisition: <b>40000543BL00996</b> Drawn At:	Physician: <b>BOYANTON JR,BOBBY L</b> NPI #: <b>1558564922</b> Provider #: <b>3262</b>	40000543BL00996  <b>Beaumont Laboratory</b> <b>Beaumont Laboratory</b> <b>3601 W. Thirteen Mile Road</b> <b>Royal Oak, MI 48073</b> <b>Atlas Requisition</b> <b>E-Order</b>
Patient	<div style="border: 2px solid blue; border-radius: 15px; padding: 10px; width: fit-content; margin: auto;"> <p>E-Order on requisition tells the Laboratory to look in the Lab Computer system for the electronically transmitted order</p> </div>	
Patient ID: <b>6002987</b> Name: <b>ATLASMERGE,MICHELLE</b> Sex/DOB/Age: <b>Female 09/29/1978 35 Years</b> Address: <b>123 MAIN STREET GARDEN CITY, MI 48135</b> Phone: <b>(734)555-1212</b>		
Guarantor		
Name: <b>ATLASMERGE,MICHELLE</b> Relationship: <b>Self</b> Address: <b>123 MAIN STREET</b>		<b>Miscellaneous</b> Floor # / Room #: User Initials: <b>Caldwell,Michelle</b> Specimen Collected By: Ext ID: <b>40000543BL00996</b>

## How and Why Orders Split into Multiple Requisitions

Testing requirements may cause the orders for a single patient to print on multiple request forms, this can be due to:

**Specimen Transport Requirements** – each type of transport requirement, i.e. room temperature, frozen, or refrigerated will generate its own request form so that the specimen is never separated from its appropriate paperwork.

**Microbiology Orders, Anatomic Pathology, and Cytology Orders** – all of these order types generate separate individual request forms due to system requirements within the laboratory itself. There is a limit of one order per request form for each of these order types.

**24 Hour Urine Collections** – because these tests often arrive at the lab at a later time than the other tests ordered on the patient, 24 hour urine test orders print on their own request form.

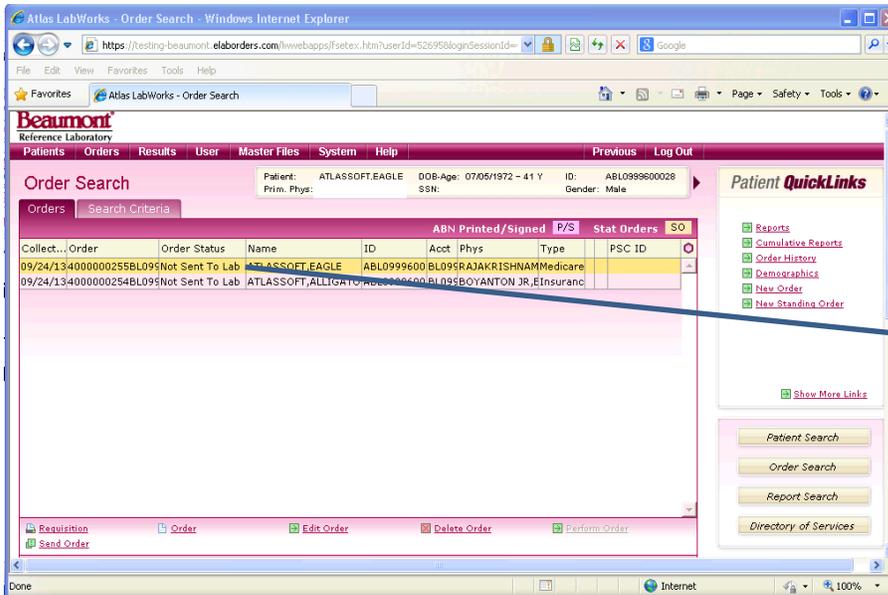
**Different Specimen Priorities** – specimens that are ordered as STAT will print separately from orders that are not ordered as STAT. *When placing orders on one patient and some tests are STAT, while others are routine priority, please bag the STAT orders separately from the routine orders, but staple all bags belonging to the same patient together. This will ensure proper handling at the lab.*

### 6. Sending Test Orders to the Laboratory:

Orders placed in the system will have an initial status of "Not Sent to Lab". At scheduled intervals the system will automatically send the electronic order to the laboratory, and the order status will then display as "Sent to Lab". If for some reason, the "Sent to Lab" step does not proceed, the order will be directed to an error queue in Atlas and an assigned Customer Service Representative or Laboratory Processor will resolve the issue and complete the order process at Beaumont Laboratory. Should you notice that an order remains at the "Not Sent to Lab" please package the specimen and requisition as you normally would and send the order on to the laboratory.

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If you should notice that none of your orders are advancing to the “Sent to Lab” status, please contact the laboratory, as a system error has occurred within your application and assistance from the Laboratory IT department may be required to restore full functionality.

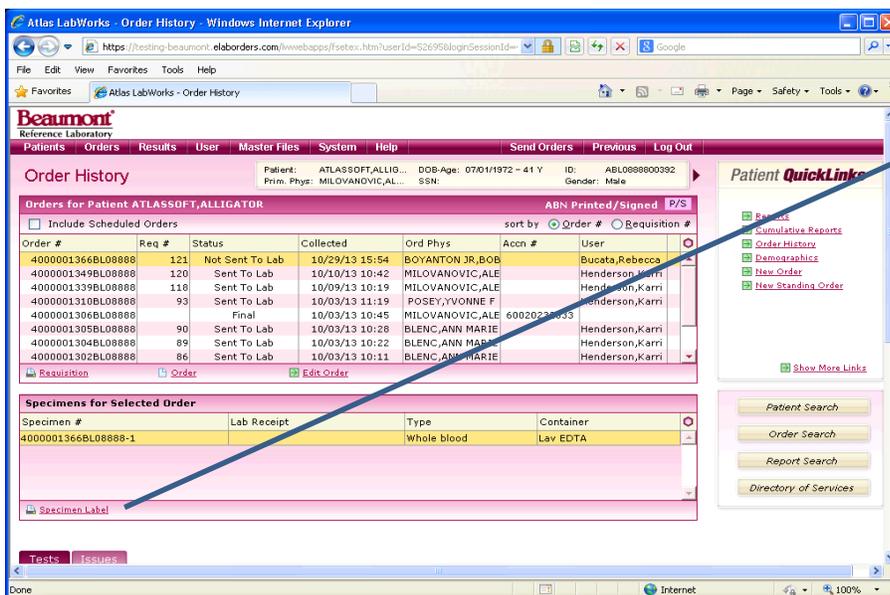


Orders initially have an Order Status of *Not Sent to Lab*. At scheduled intervals the Atlas system sends the orders to Beaumont Laboratory via the electronic interface. At such time the Order Status will display as *Sent to Lab*.

## Reprinting Specimen Labels:

Your specimen labels should prompt to print automatically, but should you need to reprint labels follow this process:

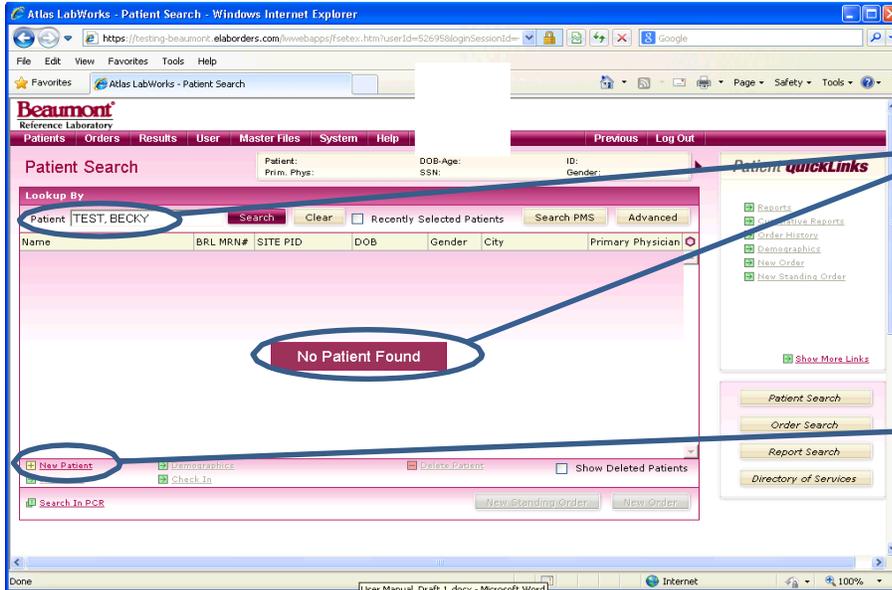
On the *Patient Search* menu locate and highlight your patient and select *Order History*, then hit enter. Once the patient is selected, go to *Patients* and select *Order History*, and hit enter, the order history on that patient will display. Click on the order that you need labels for, it will highlight, then click on the *Specimen Label* option located at the bottom left of the screen and the label options screen will display, adjust the number of label sets to print if necessary, then click the OK button in the Print Labels pop-up to reprint the labels.



Select the Order History option in the “Patients” menu and highlight the desired order. Click on the “Specimen Label” option to reprint the labels.

## Entering a New Patient into the Atlas system:

If your patient is not found in the Atlas PCR system, you can add them to your database by performing the *New Patient* function (the patient will be added to PCR by the Beaumont Patient Registration team). Begin this process from the *Patient Search* screen by clicking on the *New Patient* option.

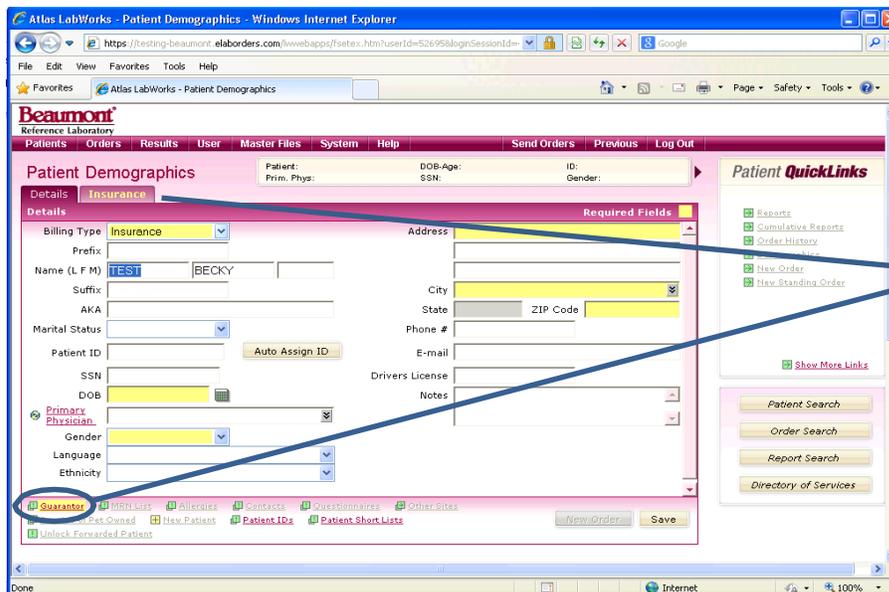


Here we have searched for the patient "TEST, BECKY" but no patient was found.

Begin the process of adding this patient to the Atlas system by clicking on "New Patient".

## Enter Patient Detail Information

Select the Billing Type from the drop-down list. Enter the required information (highlighted fields) and other pertinent information about the patient. Click **Save**. Click the *Guarantor* link to add guarantor information. (If Guarantor information is the same as the patient information, click **Copy from Patient** in the Guarantor Information dialog box to transfer the information.)



Yellow fields are required information. Fill in other fields with information as available and appropriate. Click on the "Insurance" tab to continue.

Click on Guarantor to fill in the required guarantor information

# Beaumont

## Enter Patient Insurance Information

Click the *Insurance* tab.

Select an option for the type of providers to display.

Select a Primary Insurance provider from the drop-down list.

Enter the policy number.

Enter Secondary Insurance provider information if applicable.

Click **Save**.

The screenshot shows the 'Atlas LabWorks - Patient Demographics' interface in Internet Explorer. The 'Insurance' tab is selected, and the 'Primary Insurer' section is filled out. The insurer is 'AETNA - CHOICE POS II'. The policy number is '9999999'. The subscriber is 'TEST BECKY'. The form includes fields for Network, Responsible Party, Issue Date, Expires, Address, City, State ZIP Code, Employer, Status, Policy #, Group ID #, Lab, Relationship, Gender, SSN, and DOB. A 'Save' button is visible at the bottom right of the form. A blue callout box points to the 'Save' button.

On the "Insurance" tab fill in the required (yellow) fields, and provide as much of the additional information as available. Click "Save" to complete the process. Your patient has now been entered into the system.

**\*\*\*When entering a new patient into the system, be sure to send the laboratory a copy of the patient's Driver's License and Insurance Card so that the correct information can be entered into the Beaumont Health System patient database**

### Viewing and Printing Lab Reports

#### Search Lab Reports

Select Reports from the Results menu.  
 Search for the desired patient in the Patient lookup in the Search Criteria tab.  
 Enter other pertinent information about the report in the corresponding fields.  
 Click Search.

**Version 19** Patient Reports screen has a new column “Resulted” (date):

### Patient Reports

Report    Search Criteria

Reports for Patient **ATUPGRADE,MICHELLE**

Collected	Resulted	Reported	Order #	Status	Lab
03/04/16 13:35	03/04/16 13:44	03/04/16 13:51	40004549BL09996	Final	1
03/03/16 12:45	03/03/16 12:54	03/03/16 12:56	40004545BL09996	Final	1
03/01/16 10:31	03/01/16 10:59	03/01/16 11:02	40004514BL09996	Final	REF
03/01/16 10:31	03/01/16 10:52	03/01/16 10:57	40004513BL09996	Final	1

**ATUPGRADE,MICHELLE**  
 ID: ALES02399    Female    09/29/1978    37Y    Prim. Phys: KOLINS,MA...  
 BRLMRN: 6013725

**Reported Results**    Sort    Result Name    Abnormal    Updated    U    Notes    N    Historical Result    H

Result Name	Collected	Resulted	Result	Units	Ref. Range	Level	Test Code	Lab			
Cholesterol	03/04/16 13:35	03/04/16 13:44	185	mg/dL	70-199		LAB5084	R		N	H
Cholesterol/HDL Ratio	03/04/16 13:35	03/04/16 13:44	3.8		1.8-4.9		LAB5084	R		N	H
HDL Cholesterol	03/04/16 13:35	03/04/16 13:44	49	mg/dL	40-90		LAB5084	R		N	H
LDL Cholesterol, calculate	03/04/16 13:35	03/04/16 13:44	113	mg/dL	50-129		LAB5084	R		N	H
Non-HDL Cholesterol, calc	03/04/16 13:35	03/04/16 13:44	136	mg/dL	70-159		LAB5084	R		N	H
Triglycerides	03/04/16 13:35	03/04/16 13:44	115	mg/dL	30-149		LAB5084	R		N	H

Test Name:

Order#/Case#:

Result Notes:

Results List    Graph Results    Historical Results    Result Detail

**Tests for Selected Order #40004549BL09996**

Test Code	Test Name	Test Status	Diagnosis Codes	Passed LCD/NCD	Service Provider
LAB5084	Lipid Panel	Final	E55.9	Not Performed	Beaumont Laboratory

You can search by the resulted date and time range in the Reports Search Criteria screen:

**Reports** SOFTTEST, BECKY  
ID: Female 03/22/1963 52Y Prim. Phys: SYKES, ELIZ...  
BRLMRN: 6013799

**Search Criteria**

Patient: [Dropdown]  
Ordering Location: [Dropdown]  
Reported Date Range: 03/02/2016 To 03/09/2016  
**Resulted Date Range: [Dropdown] To [Dropdown]**  
**Resulted Time Range: [Dropdown] To [Dropdown]**  
Report Status: All [Dropdown]  
Source: [Dropdown]  
Ordering Account: [Dropdown]  
**Issue Type: [Dropdown] Custom**  
Only Display:  Unread by Me  
 New (no one has read)  
 Abnormal  
 Finalized

Ordering Physician: [Dropdown]  
Contains Unsolicited Test: [Dropdown]  
Order #: [Text]  
Accession #: [Text]  
Reports Containing:  Test Not Performed  
 Cancelled test  
 Updated result  
**Sort Reports By: Report Date [Dropdown]**  
Forwarded to ES: [Dropdown]

Search Clear

## View Lab Report

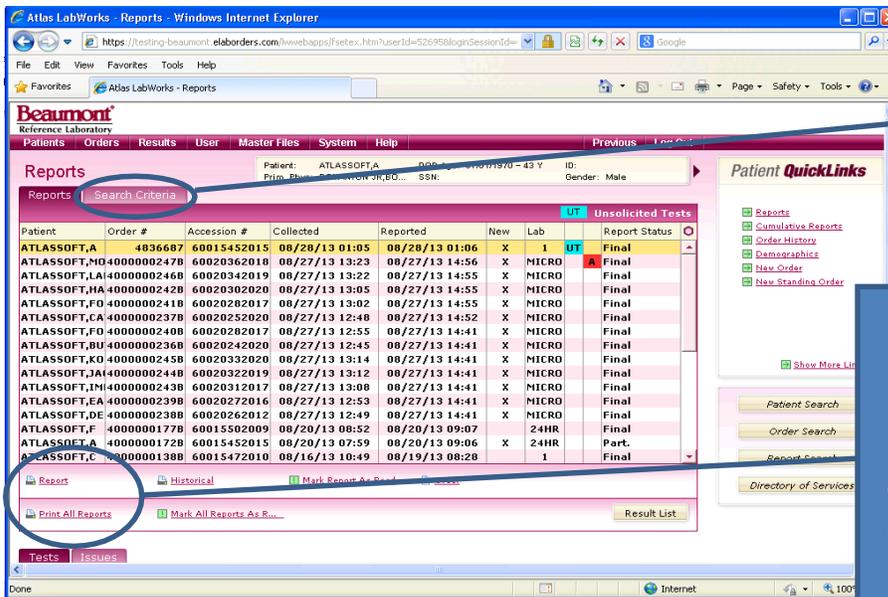
Based on the search criteria provided in the Search Criteria tab, the list of reports automatically opens in the Lab Reports tab.

**To view the tests and issues related to a particular report,**

1. Select the desired report from the table.
2. Click on Result List to view results.
3. Click the Test tab below the Reports table to view the tests.
4. Click the Issues tab below the Reports table to view the issues. You can filter the issues by the following options:
  - All Issues
  - Require Action
  - No Action Required

## Print a Lab Report or Print all Reports

From the Screen view of the desired report, click on the *Print Report* option, the printing screen will display, select the appropriate printer and options and click on the *Print* button. By clicking on the *Print All Reports option* you can also print all the reports defined to the list by the *Search Criteria* tab.



Use the "Search Criteria" tab to define the reports you wish to view or print. The reports meeting the defined criteria will display on the "Reports" tab.

Highlight an individual report by clicking on it and view or print it by clicking on the arrow next to the "Report" option and choosing your option. Print all the reports defined in your search by clicking the "Print All Reports" option.

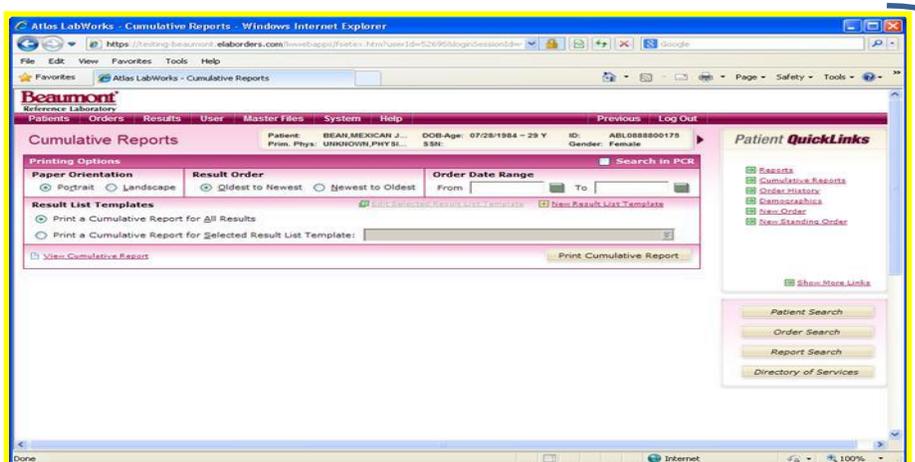
## Cumulative Reports

You can print a cumulative report of a Patient's laboratory results by using the *Cumulative Report* function.

Select a patient via the *Patient Search* function on the *Patients* menu; highlight the desired patient by clicking on the line that displays the desired patient.

With the desired patient selected (highlighted), click on *Cumulative Reports* in the *Patients* menu. The Cumulative Reports screen will open.

Fill out the fields on the *Cumulative Report* screen and click the *Print Cumulative Report* button to print the report.



Cumulative Reports Screen, fill out the fields and select the options to define the type of cumulative report you wish to print, then click the "Print Cumulative Report" button

## Functionality in the Insurance Screens

When the patient has multiple insurances (primary and secondary, etc.) the insurances are listed onscreen instead of only being able to check the priority assignment via a drop down field. This makes selecting and changing the primary insurance for the order easier. The insurance priority can be moved up and down by use of the arrow buttons in the right hand columns of the screen.

**Beaumont**  
Reference Laboratory

Patients Orders Results User Master Files Help Previous Log Out

**Patient Demographics** ATUPGRADE, MICHELLE  
ID: ALES02389 Female 09/29/1978 37Y Prim. Phys: KOLINS, MA...  
BRLMRN: 6013725

Details Insurance

**Active Insurance Providers** Missing Information MI

Insurance Provider	Policy #	Group #	Expires	Billing Type	Pre-Approved/Local	Priority		
BCBS - BLUE CHOICE POS	ABC312654987	12345			Local	Primary	▲	▼
AETNA - CHOICE POS II	543212	1235		Commercial	Pre Approved	Secondary	▲	▼

New Provider Edit Provider Remove Provider

**Associated Insurance Providers**

Insurance Provider	Policy #	Group #	Expires	Billing Type	Pre-Approved/Local

When entering new insurance for a patient the insurance page pops out on the screen, there is a field “Priority” to set the primary or secondary status of the insurance being entered:

**Beaumont**  
Reference Laboratory

Patients Orders Results User Master Files Help Previous Log Out

**Patient Demographics** TEST, M  
ID: ABL099600... Female 01/01/1970 46Y Prim. Phys: BRLMRN:

Details Insurance

**Active Insurance Providers** Missing Information MI

New Provider Edit Provider Remove Provider

**Associated Insurance Providers**

Insurance Provider

**Atlas LabWorks ...**

**New Insurance Provider for TEST, M** Pre-Approved Local Required Fields

Insurer filter by: Medicare Medicaid  
AETNA - AFFORDABLE HEALTH CHOICES Status

Network Lab

Responsible Party (L F MI) TEST M Group ID #

Issue Date Expires Priority Primary

Moved Policy # 52143 New

Subscriber (L F MI) TEST M Relationship Self

Address 322 Main Street Gender Female

City, State ZIP Code TROY, MI 48098 SSN

Employer DOB 01/01/1970 Phone

Copy Subscriber Information From Patient Copy Subscriber Information from Guarantor Save Cancel

# Beaumont

## Adding a “Local” Insurance Provider not on the Pre-Approved List

At times you may encounter patients who have health insurance plans that are not part of a large national company. Within the Atlas system such insurance plans are termed “Local Insurances” and will probably not be found within your account database. These insurance providers and the subscriber information necessary to submit billing to the insurance provider can be entered into the system and saved for future use.

You can add a local provider type of insurance through the Local Insurance Providers function. On the *Master Files* menu click on *Local Insurance Providers*, the screen for this option will open. Click the *New Provider* link to clear all fields and add another local insurance provider; or select a provider from the drop down list to display and edit the provider details.

Enter the required information and other pertinent information about the new insurance provider; or edit the selected Provider’s information as necessary.

After adding or editing provider information, click the *Save* button to store the insurance information.

Click the *Insurance* tab.

Select an option for the type of providers to display. Choices include Medicare, Medicaid Commercial, Automobile, Workers Compensation

Select a Primary Insurance provider from the drop-down list.

Enter the policy number.

Enter Secondary Insurance provider information if applicable.

Click **Save**.

The screenshot shows the 'Insurance Providers' form in the Atlas system. The form is titled 'Insurance Providers' and has a 'Required Fields' indicator. It features a 'Select Provider' dropdown menu with 'Pre-Approved' and 'Local' radio buttons. The 'Local' option is selected. The form contains various input fields for insurance details, including 'Insurance Provider' (Jim Bob's Insurance Company), 'Insurance Type', 'Insurance Code', 'Insurance Bill Code', 'Telephone #', 'Billing Status', 'Address', 'City', 'State', 'ZIP Code', 'Country', 'Lab', and 'Diagnosis Code Type'. There are also checkboxes for 'Is Active?', 'All Diagnosis Codes Must Pass', 'Require Specific Diagnosis Codes', 'Show Accident Date', 'Required Fields For Patient', and 'Required Fields For Order'. A 'Save Provider' button is located at the bottom right of the form.

On the “Insurance” tab fill in the required (yellow) fields, and provide as much of the additional information as available. Click “Save Provider” to complete the process. Your patient has now been entered into

**\*\*\*When entering a new patient into the system, be sure to send the laboratory a copy of the patient’s Driver’s License and Insurance Card so that the correct information can be entered into the Beaumont Health System patient database**

## Replacing a Patient’s Existing Insurance with New Insurance

# Beaumont

You can update the patient’s insurance in the client record by going to the insurance tab and clicking the link “clear insurer data” and then entering the new insurance. Continue the order process and save the order. This will save the change in your client file only. Be sure to send a copy of the Patient’s ID and new insurance card with the paperwork and specimens and indicate that it is new insurance. The laboratory will forward the copies on to the billing department so that the patient’s hospital file can be updated.

**Beaumont Reference Laboratory**

Patients Orders Results Master Files System Help Previous Log Out

**Patient Demographics** Patient: ATLASOFT,BUTT... DOB-Age: 07/02/1972 – 41 Y ID: ABL0999400005  
Prim. Phys: PLAWNY-LEBENB... BRLMRN: 6002024 Gender: Female

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

**Primary Insurer** Insurance Providers Primary Insurer

filter by: Medicare Medicaid **Clear Insurer Data**

**HAP - POS OPEN DELIVERY** Status  
Network Policy # 123456789  
Responsible Party (L F MI) Group ID # 12345  
Issue Date 07/22/2013 Expires Lab  
Subscriber (L F MI) ATLASOFT BUTTERFLY Relationship Self  
Address 123 WISTERIA LANE APT B Gender Female  
City, State ZIP Code TROY, MI 48098 DOB 07/02/1972  
Employer Phone (248)898-4321

Copy Subscriber Information From Patient Add Secondary Insurer Set Insurance Payer Priority

Guarantor Allergies Contacts Questionnaires Species of Pet Owned New Patient  
Patient IDs Patient Short Lists Unlock Forwarded Patient New Order Save

The “Clear Insurer Data” link will erase the existing patient insurance information and allow you to enter the new insurance in the patient’s file at the client site.

If the update patient information screen appears during the insurance update process, be sure to review the information carefully, if the PCR information already contains the new insurance information, then accept the update. If the information from the PCR is not the new information, click ignore to save your newly entered insurance data.

**Update Patient Information** Has Different Values

The demographic information for this patient on your site does not match the information in the Patient Centric Repository (PCR). Would you like to update "Your Site Information" with the data from "Patient Centric Repository Information"?

Patient Centric Repository Information	Your Site Information
<b>PCR - Demographics Information</b>	<b>Your Site - Demographics Information</b>
Last Updated: 10/14/2013 10:59AM	Last Updated: 08/15/2013 03:03PM
Billing Type: Insurance	Billing Type: Insurance
Name (L F MI): TAYLOR AMY	Name (L F MI): TAYLOR AMY
AKA: [Empty]	AKA: [Empty]
SSN: [Empty] Is Auto Assigned: No	SSN: [Empty] Is Auto Assigned: No
Gender: Female DOB: 08/01/1955	Gender: Female DOB: 08/01/1955
Address: 4589 SUGAR MAPLE AVE	Address: 99887 WARD AVE
City: ROYAL OAK	City: ROYAL OAK
State: MI ZIP: 48067	State: MI ZIP: 48067
Phone: (248)997-1122	Phone: (248)997-1122
<b>PCR - Guarantor Information</b>	<b>Your Site - Guarantor Information</b>
Guarantor Name: TAYLOR,AMY	Guarantor Name: TAYLOR,AMY
Address: 4589 SUGAR MAPLE AVE	Address: 99887 WARD AVE
City, State ZIP: ROYAL OAK MI 48067	City, State ZIP: ROYAL OAK MI 48067

Ignore Update

If the update patient information screen appears after entering new patient information, you need to click the “Ignore” button to retain your newly entered data.

### Collection Lists

Clients who previously utilized Pending Lists or Specimen Manifests, or a combination of the two may find it more advantageous to instead generate a daily collection list. The collection list will display all orders collected for that day regardless of status (sent to lab, not sent to lab, final, etc...) including orders that may have been collected at a PSC site (although those orders do not show the individual tests ordered). The Collection List can be generated by following the below process:

To pull a list for specimens collected on a single day, open Order Search screen and set the criteria:

1. Primary Sort: Coll'd Date/Time
2. Location: client office (should default but if not use drop down to select it)
3. Collected Date Range

Click Search:

**Order Search** Patient: PCRTRAIN,IBIZAN ... DOB-Age: 08/14/1981 – 32 Y ID: BRLMRN: Gender: Female

Orders Search Criteria

Query All Orders

Primary Sort Coll'd Date/Time

Search Clear Reset

Patient [Dropdown] Location Troy - Test OB/GYN Practice

Account [Dropdown] Ordering Physician [Dropdown] Status [Dropdown]

Billing Type [Dropdown] Created Date Range [Calendar] To [Calendar]

Order # [Text] Scheduled Date Range [Calendar] To [Calendar]

ES Order # [Text] Collected Date Range 06/27/2014 To 06/27/2014

Accn # [Text] Resulted Date Range [Calendar] To [Calendar]

Source [Dropdown] Edited Date Range [Calendar] To [Calendar]

Issue ID [Text]

Test Code  Code  Name  Mnemonic  Pending Results  Never Printed

When the search comes up, click Search Results → View Search Results Report

**Order Search** Patient: PCRTRAIN,IMPAL... DOB-Age: 12/28/1967 – 46 Y ID: ABL0999404815 Prim. Phys: BRLMRN: 6004793 Gender: Male

Orders Search Criteria

Collect...	Order	Order Status	Name	ID	Acct	Phys	Type	Stat Orders	SO
06/27/14	40003157BL09994	Sent To Lab	PCRTRAIN,IMPALA SPE	ABL0999404	BL099	SYKES,ELIZABE	Insuranc		
06/27/14	40003156BL09994	Received By Lab	APATLAS,TESTA	ABL0999404	BL099	GROSSMAN,DA	Insuranc	SC	
06/27/14	40003155BL09994	Received By Lab	APATLAS,TESTA	ABL0999404	BL099	GROSSMAN,DA	Insuranc		
06/27/14	40003154BL09994	Sent To Lab	ATLASTEST,APLINDA	ABL0999404	BL099	ADLER,EDWARD	Insuranc		
06/27/14	40003149BL09994	Sent To Lab	TRAINPSC,CROCODIL	ABL0999404	BL099	GROSSMAN,DA	Insuranc	RMOB	

**Search Results**

- Print Search Results Report
- View Search Results Report
- Toggle Default Action (View or Print)
- Print To Alternate Pri...
- Set Default Printer
- Information

Edit Order Perform Order

Search Results Pending Tests Refresh Grid

# Beaumont

When the report options comes up you can sort multiple ways.

1. Select Patient Name-all testing for that patient on that day will filter together. This also alphabetizes your list making it easier to find the order when matching up the results when they come back.
2. Sort Direction to Ascending-list will sort by last name A-Z
3. Click Ok

**Report Options**

Sort Field: Patient Name

Sort Direction: Ascending

Maximum Number of Orders:

Pending Results

Include Unsolicited Tests

[Download/Export](#) Cancel OK

A sample report:

Collected Date	Order Number	Order Status	Patient Name	Patient ID	Account	Physician	Billing Type
06/27/14 14:21	40003155BL09994	Received By Lab	APATLAS,TESTA	ABL0999404647	BL09994	GROSSMAN,DAVID M	Insurance
TEST: LAB5139 - Complete Blood Count w Diff STATUS: Received By Lab CPT CODES: 85025 ICD-9 CODES: V70.0, 250.00, 285.9							
TEST: LAB5059 - Hemoglobin A1c STATUS: Sent To Lab CPT CODES: 83036 ICD-9 CODES: V70.0, 250.00, 285.9							
06/27/14 14:21	40003156BL09994	Received By Lab	APATLAS,TESTA	ABL0999404647	BL09994	GROSSMAN,DAVID M	Insurance
TEST: LAB5208 - Protine INR STATUS: Received By Lab CPT CODES: 85610 ICD-9 CODES: V70.0, 250.00, 285.9							
06/27/14 13:45	40003154BL09994	Sent To Lab	ATLASTEST,APLINDA	ABL0999404643	BL09994	ADLER,EDWARD	Insurance
TEST: LAB6674 - Pap Test (Thin Prep) STATUS: Sent To Lab CPT CODES: ICD-9 CODES: V76.2							
06/27/14 15:33	40003157BL09994	Sent To Lab	PCRTRAIN,MPALA SPEEDY	ABL0999404815	BL09994	SYKES,ELIZABETH	Insurance
TEST: LAB6455 - Sodium, Urine STATUS: Sent To Lab CPT CODES: 84300 ICD-9 CODES: 276.51							
TEST: LAB5440 - Chloride, Urine STATUS: Sent To Lab CPT CODES: 82436 ICD-9 CODES: 276.51							
TEST: LAB5449 - Potassium, Urine STATUS: Sent To Lab CPT CODES: 84133 ICD-9 CODES: 276.51							
TEST: LAB5031 - Comprehensive Metabolic Panel STATUS: Sent To Lab CPT CODES: 80053 ICD-9 CODES: 276.51							
TEST: LAB5105 - Prostate Specific Antigen (PSA), Diagnostic STATUS: Sent To Lab CPT CODES: G0103 ICD-9 CODES: 276.51							
06/27/14 11:54	40003149BL09994	Sent To Lab	TRAINPSC,CROCODILE LIZARD	ABL0999404710	BL09994	GROSSMAN,DAVID M	Insurance
TEST: LAB5003 - Albumin STATUS: Sent To Lab CPT CODES: 82040 ICD-9 CODES: 794.8							

Filter Criteria

Location	Troy - Test OB/GYN Practice
Deleted	No
Collected Date Range	06/27/2014 to 06/27/2014
<b>Total Number of Orders</b>	<b>5</b>

Print Report Maximize Window Restore Window Close

## Printing an Order Manifest

Manifests list the orders and specimens that are included in each shipment to the laboratory. Every time the *Send to Lab* function is performed (either automatically, or manually); the system sends the processed orders to a manifest. You can print out the manifests for use as an in-office log to track that your office receives the expected reports for each order sent to the laboratory. Because the *Send to Lab* function is performed multiple times a day, there will be

# Beaumont

multiple manifests generated for each workday. Clients may find it advantageous to print a single *Coalesced Manifest* for each workday rather than try to work from multiple lists. Follow the below process to generate a coalesced manifest.

Select Manifests from the Orders drop down menu:

**Beaumont Reference Laboratory**

Patients | Orders | Results | User | Master Files | System | Help | Previous | Log Out

**Manifests**

- Order Search
- All Orders
- Not Sent to Lab
- Partially Completed
- Standing Order List
- Order Approval
- Order Approval Maintenance

Location: [Dropdown]

To: [Date Picker]  New Search Clear

Date	Time	Sent To	Ordering Location	Manifest #	New
07/01/14		Beaumont Laboratory	Troy - Test OB/GYN Practice	1175	Yes
06/30/14		Beaumont Laboratory	Troy - Test OB/GYN Practice	1174	Yes
06/30/14		Beaumont - Microbiology	Troy - Test OB/GYN Practice	1173	Yes
06/30/14		Beaumont Laboratory	Troy - Test OB/GYN Practice	1172	Yes
06/29/14		Beaumont Laboratory	Troy - Test OB/GYN Practice	1171	Yes
06/29/14		Beaumont - Urine Timed	Troy - Test OB/GYN Practice	1170	Yes
06/29/14	22:10	Beaumont Laboratory	Troy - Test OB/GYN Practice	1169	Yes
06/28/14	06:30	Beaumont Laboratory	Troy - Test OB/GYN Practice	1168	Yes
06/27/14	15:50	Beaumont Laboratory	Troy - Test OB/GYN Practice	1167	Yes
06/27/14	14:30	Beaumont Laboratory	Troy - Test OB/GYN Practice	1166	Yes
06/27/14	13:59	Beaumont - Pathology	Troy - Test OB/GYN Practice	1165	Yes
06/25/14	14:30	Beaumont Laboratory	Troy - Test OB/GYN Practice	1164	Yes
06/25/14	14:20	Beaumont Laboratory	Troy - Test OB/GYN Practice	1163	Yes
06/25/14	10:40	Beaumont Laboratory	Troy - Test OB/GYN Practice	1162	Yes

Manifest List Manifest Layout Manifest

Print Coalesced Manifest Print All Manifest

Select a date range to sort by, for a single day use the same dates in the “from” and “to” fields:

**Beaumont Reference Laboratory**

Patients | Orders | Results | User | Master Files | System | Help | Previous | Log Out

**Manifests**

Manifest Search Criteria

Manifest Number: [Text Box] Location: [Dropdown]

From: 06/30/2014 To: 06/30/2014  New Search Clear

Date	Time	Sent To	Ordering Location	Manifest #	New
07/01/14	09:24	Beaumont Laboratory	Troy - Test OB/GYN Practice	1175	Yes
06/30/14	09:59	Beaumont Laboratory	Troy - Test OB/GYN Practice	1174	Yes
06/30/14	09:30	Beaumont - Microbiology	Troy - Test OB/GYN Practice	1173	Yes
06/30/14	09:30	Beaumont Laboratory	Troy - Test OB/GYN Practice	1172	Yes
06/29/14	22:40	Beaumont Laboratory	Troy - Test OB/GYN Practice	1171	Yes
06/29/14	22:10	Beaumont - Urine Timed	Troy - Test OB/GYN Practice	1170	Yes
06/29/14	22:10	Beaumont Laboratory	Troy - Test OB/GYN Practice	1169	Yes
06/28/14	06:30	Beaumont Laboratory	Troy - Test OB/GYN Practice	1168	Yes
06/27/14	15:50	Beaumont Laboratory	Troy - Test OB/GYN Practice	1167	Yes
06/27/14	14:30	Beaumont Laboratory	Troy - Test OB/GYN Practice	1166	Yes
06/27/14	13:59	Beaumont - Pathology	Troy - Test OB/GYN Practice	1165	Yes
06/25/14	14:30	Beaumont Laboratory	Troy - Test OB/GYN Practice	1164	Yes
06/25/14	14:20	Beaumont Laboratory	Troy - Test OB/GYN Practice	1163	Yes
06/25/14	10:40	Beaumont Laboratory	Troy - Test OB/GYN Practice	1162	Yes

Manifest List Manifest Layout Manifest

Print Coalesced Manifest Print All Manifest

# Beaumont

Click on "Print Coalesced Manifest":

**Beaumont Reference Laboratory**

Manifests

Manifest Search Criteria

Manifest Number: [ ] Location: [ ]

From: 06/30/2014 To: 06/30/2014  New Search Clear

Date	Time	Sent To	Ordering Location	Manifest #	New
06/30/14	09:59	Beaumont Laboratory	Troy - Test OB/GYN Practice	1174	Yes
06/30/14	09:30	Beaumont - Microbiology	Troy - Test OB/GYN Practice	1173	Yes
06/30/14	09:30	Beaumont Laboratory	Troy - Test OB/GYN Practice	1172	Yes

Manifest List Manifest Layout Manifest

Print Coalesced Manifest Print All Manifest

Answer any printing prompts and the Coalesced Manifest will print:

**Beaumont Laboratory**

Shipping Manifests #1172, 1173, 1174 [06/30/2014 09:30 - 06/30/2014 09:59 ]

PRINTED ON 07/01/2014 AT 10:07

From ID	To Address
Troy - Test OB/GYN Practice BL09994 123 First Street Troy, MI 48065	

Lab Order #	Patient Name	Order Text	Specimen	Temperature	Account #	Code	Packing Slip #	Patient ID	Specimen #	
1	400031888LD999	PCRTRAIN,INSECT CREEPY	Complete Blood Count	Ref 1.59 Whole blood	Refrigerated	Troy - Test	LAB5141	2950	ABL099940481	400031888LD9994
2			Culture, Wound Deep	Room .1 Source	Room Temperature	Troy - Test	LAB5510	2951	ABL099940481	400031888LD9994
3			Reticulocyte Count	Ref 1.59 Whole blood	Refrigerated	Troy - Test	LAB5158	2950	ABL099940481	400031888LD9994
4	400031898LD999	PCRTRAIN,IBIS EGYPTIAN	Bilirubin Total	Ref .2 Serum	Refrigerated	Troy - Test	LAB5017	2952	ABL099940478	400031898LD9994
5			Glucose	Ref .2 Serum	Refrigerated	Troy - Test	LAB5062	2952	ABL099940478	400031898LD9994

## Printing a Pending Test List

A Pending Test List is a comprehensive listing of orders selected by a date range that do not have the order status of "Final" you can create the pending list through the following steps

Select *Order Search* from the *Orders* menu.

Select the *Search Criteria* tab; enter the desired date range for the selected parameter you wish to search for.

# Beaumont

Check off the *Pending Results* box.

Click on the *Search* button.

Beaumont Reference Laboratory  
Patients Orders Results Master Files System Help Previous Log Out

Order Search Patient: SOFTLABMU, SEVEN DOB-Age: 10/26/1913 - 100 Y ID: ABL0888800450 Prim. Phys: KOLINS, MARK D SSN: Gender: Female

Search Criteria

Query [ ]

Primary Sort: Created Date [v] Search [ ] Clear [ ] Reset [ ]

Patient [v] Location: SLAB - Test Practice [v]

Account [v] Ordering Physician [v] Status [v]

Billing Type [v] Created Date Range: 11/01/2013 To 11/25/2013

Order # [ ] Scheduled Date Range [ ] To [ ]

ES Order # [ ] Collected Date Range [ ] To [ ]

Accon # [ ] Resulted Date Range [ ] To [ ]

Source [v] Edited Date Range [ ] To [ ]

Issue ID [ ]

Test Code [v] Code [ ] Name [ ] Mnemonic [ ]

Pending Results  Never Printed

Tests for Selected Order

Select the *Search Criteria* tab in *Order Search*; and enter a date range.

Check off the *Pending Results* box.

Click on the *Search* button.

A list of pending orders for the selected parameters will display, click on the *Pending Tests* option to print the list of pending orders.

Beaumont Reference Laboratory  
Patients Orders Results Master Files System Help Previous Log Out

Order Search Patient: ALLERGY, A DOB-Age: 06/14/1982 - 31 Y ID: ABL0888800067 Prim. Phys: BLENC, ANN MARIE SSN: Gender: Female

Search Criteria

Collect...	Order	Order Status	Name	ID	Acct	Phys	Type	P/S	Stat Orders	SO
11/25/13	4000001377BL0888	Sent To Lab	ALLERGY, A	ABL0888800	BL088	BLENC, ANN MAI	Account			
11/25/13	4000001376BL0888	Sent To Lab	TEST, AAA	ABL0888800	BL088	AARON, ARNOLD	Medicare			
11/22/13	4000001375BL0888	Partially Comple	SOFTLABMU, SEVEN	ABL0888800	BL088	KOLINS, MARK C	Account			
11/22/13	4006765136BL0888	Partially Comple	SOFTPATHMU, GEND	ABL0888800	BL088	KOLINS, MARK C	Account			
11/22/13	4000001374BL0888	Received By Lab	SOFTMICMU, CARMEN	ABL0888800	BL088	PANSARE, VAISH	Account			
11/21/13	4000001372BL0888	Partially Comple	SOFTMICMU, CARMEN	ABL0888800	BL088	KOLINS, MARK C	Account			
11/20/13	400676107BL0888	Partially Comple	SOFTTEST, AMANDA	ABL0888800	BL088	BLENC, ANN MAI	Account			
11/20/13	400676058BL0888	Partially Comple	SOFTPATHMU, GENC	ABL0888800	BL088	KOLINS, MARK C	Account			
11/19/13	400675922BL0888	Partially Comple	SOFTPATHMU, GEMB	ABL0888800	BL088	KOLINS, MARK C	Account			
11/18/13	400675895BL0888	Partially Comple	SOFTPATHMU, GENA	ABL0888800	BL088	KOLINS, MARK C	Account			
11/15/13	400675516BL0888	Partially Comple	SOFTMEANINFULUSE, T	ABL0888800	BL088	BLENC, ANN MAI	Account			
11/15/13	400675504BL0888	Partially Comple	SOFTMEANINFULUSE, T	ABL0888800	BL088	BLENC, ANN MAI	Account			
11/13/13	400675378BL0888	Partially Comple	SOFTMEANINFULUSE, T	ABL0888800	BL088	BLENC, ANN MAI	Account			
11/07/13	400674950BL0888	Received By Lab	SOFTTEST, ENSEMBLE	ABL0888800	BL088	KRASNICK, JANI	Account			
11/04/13	4000001368BL0888	Partially Comple	SOFTTEST, MICHAEL	ABL0888800	BL088	KOLINS, MARK C	Account			
11/01/13	400674639BL0888	Partially Comple	SOFTTEST, MICHELLE	ABL0888800	BL088	KOLINS, MARK C	Account			
11/01/13	400674609BL0888	Received By Lab	SOFTMEANINFULUSE, T	ABL0888800	BL088	KOLINS, MARK C	Account			

Requisition [v] Order [v] Edit Order [v] Perform Order [v]

Search Results [v] Pending Tests [v]

Tests for Selected Order #4000001377BL08888

A list of orders fitting the selected parameters will display, click on the *Pending Tests* option to print the list

### Merging Patient files in Atlas:

On occasion a patient’s information will be placed into the Beaumont Health System patient database more than one time. This can occur due to name changes, use of nicknames, or registrar error. Beaumont Health System strives to maintain the integrity of the patient’s medical record by maintaining only a single copy of the patient file within its information systems. Computerized systems and specially trained personnel are utilized to recognize when patient files have been duplicated and after careful verification that the duplicate files are indeed records of only one unique patient, the patient records are merged in the Hospital information system. However, the duplicate files will continue to exist in the Atlas PCR system until the records are merged there as well.

### When to Perform a Patient Record Merge

Oftentimes the merge process is initiated within EPIC One Chart, The Beaumont Hospital Information System. When a merge occurs in the EPIC system, an electronic message is sent to the Atlas system that removes the MRN from the patient record in the Client’s Atlas database for their office.

The user should be verifying that an MRN is listed in the patient record for every order placed in the Atlas system. If the user encounters a patient file without an MRN, the user should re-acquire the patient record from the PCR and merge the PCR and client database patient records.

### The Step By Step Merge Process

**Beaumont**  
Reference Laboratory

Patients Orders Results User Master Files System Help Previous Log Out

Patient Search

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

Lookup By

Patient [ ] Search Clear  Recently Selected Patients Search PMS Advanced

BRL MRN#	Name	SITE PID	DOB	Gender	City	Primary Physician
6002222	ADAMS,AMY	ABL0999500053	08/20/1976	Female	STERLING HEIGHTS	NICHOLS,MICHAEL W
6002761	ATLASMERGE,CHRIS	ABL0999500067	09/23/1967	Female	BERKLEY	
6001543	ATLASSOFT,A	ABL0999500010	07/01/1970	Male	GARDEN CITY	BRIKHO,BASEL A
6002023	ATLASSOFT,ALLISATOR	ABL0999500011	07/01/1972	Male	GARDEN CITY	NICHOLS,MICHAEL W
6001546	ATLASSOFT,B	ABL0999500017				AEL W
6002024	ATLASSOFT,BUTTERFLY	ABL0999500012				A
6001547	ATLASSOFT,C	ABL0999500019				AEL W
6002025	ATLASSOFT,CATERPILLAR	ABL0999500013				AEL W
6001548	ATLASSOFT,D	ABL0999500020	07/04/1978	Female	ROYAL OAK	BRIKHO,BASEL A
6002026	ATLASSOFT,DEER / ATLASSOFT	ABL0999500014	07/04/1972	Female	ST HEIGHTS	BRIKHO,BASEL A
6001549	ATLASSOFT,E	ABL0999500021	07/05/1970	Male	CLINTON TOWNSHIP	NICHOLS,MICHAEL W
6002027	ATLASSOFT,EAGLE	ABL0999500015	07/05/1972	Male	CANTON TWP	NICHOLS,MICHAEL W
6001550	ATLASSOFT,F	ABL0999500022	07/06/1970	Female	TROY	BRIKHO,BASEL A
6002028	ATLASSOFT,FOX	ABL0999500016	07/06/1972	Female	ROYAL OAK	NICHOLS,MICHAEL W
6001553	ATLASSOFT,G	ABL0999500024	07/07/1970	Male	TROY	NICHOLS,MICHAEL W

New Patient Demographics Insurance Check In Delete Patient Show Deleted Patients

Search In PCR New Standing Order New Order

Patients Orders Results User Master Files System Help Previous Log Out

**Patient Search** Patient: ADAMS,AMY DOB-Age: 08/20/1976 - 37 Y ID: ABL0999500053  
Prim. Phys: NICHOLS,MICHAEL... SSN: Gender: Female

Lookup By Patient  Search Clear  Recently Selected Patients Search PMS Advanced

BRL MRN#	Name	SITE PID	DOB	Gender	City	Primary Physician
6002222	ADAMS,AMY	ABL0999500053	08/20/1976	Female	STERLING HEIGHTS	NICHOLS,MICHAEL W
6001545	ATLASMERGE,CHRIS	ABL0999500067	09/23/1967	Female	BERKLEY	NARLA,DURGADAS
6001545	ATLASSOFT,A	ABL0999500010	07/01/1970	Male	GARDEN CITY	BRIKHO,BASEL A
6002023	ATLASSOFT,...					
6001546	ATLASSOFT,...					
6002024	ATLASSOFT,...					
6001547	ATLASSOFT,...					
6002025	ATLASSOFT,...					
6001548	ATLASSOFT,...					
6002026	ATLASSOFT,...					
6001549	ATLASSOFT,...					
6002027	ATLASSOFT,...					
6001550	ATLASSOFT,...	ABL0999500022	07/06/1970	Female	TROY	BRIKHO,BASEL A
6002028	ATLASSOFT,FOX	ABL0999500016	07/06/1972	Female	ROYAL OAK	NICHOLS,MICHAEL W
6001553	ATLASSOFT,G	ABL0999500024	07/07/1970	Male	TROY	NICHOLS,MICHAEL W

**Duplicate Patient Records** were discovered in the Hospital Information System (HIS), and the records were merged, The HIS sent a message to the Atlas system which updated the associated records in the Client Database by removing the MRN #.

*The Missing MRN # is an indication that the user needs to reacquire the patient record from the PCR and merge the client record into the PCR record.*

To begin the Record Merge process, reacquire the Hospital Medical Record by clicking on the Search In PCR Link

**Patient Centric Repository Patients**

Name	MRN	DOB	Gender	PCR ID	City	Phone Number
ATLASMERGE,CHRIS	6002762	09/23/1967	Female	ALES01701	BERKLEY	(248)555-5555

Using the appropriate patient identifiers, locate and acquire the correct patient record from the PCR

# Beaumont

Once you have acquired the correct patient record from the PCR, you will have 2 patient records in your site database for the same patient, one with the MRN and one missing an MRN. You now need to merge the record that is missing the MRN *into* the record that has the correct MRN #.

**Beaumont**  
Reference Laboratory

Patients | Orders | Results | User | Master Files | System | Help | Previous | Log Out

**Patient Search**

Patient: ATLASMERGE,CH... DOB-Age: 09/23/1967 - 46 Y ID: ABL0999600073  
Prim. Phys: SSN: Gender: Female

Lookup By

Patient: ATLASMERGE, CHRIS Search Clear  Recently Selected Patients Search PMS Advanced

BRL MRN#	Name	SITE PID	DOB	Gender	City	Primary Physician
	ATLASMERGE,CHRIS	ABL0999600073	09/23/1967	Female	BERKLEY	
6002762	ATLASMERGE,CHRIS	ABL0999600082	09/23/1967	Female	BERKLEY	

Make a note of the last 6 digits of the PID, and which one has a BRL MRN #

You now have 2 records for the same patient in your database. You now need to merge the record without an MRN into the record with an MRN. This will form one complete patient record with the correct MRN # for future use. Make a note of the Site PID (the last 6 digits are sufficient) and which Site PID has a MRN # and which one does not.

+ New Patient Demographics Delete Patient Show Deleted Patients  
+ Insurance Check In

The next step in the process is to enter the Merge Patients function. Go to the Master Files dropdown menu and click on Merge Patients.

Patients | Orders | Results | Master Files | System | Help | Previous | Log Out

**Patient Search**

Lookup By

Patient: [ ] Search Clear  Recently Selected Patients Search PMS Advanced

DOB-Age: ID:  
SSN: Gender:

Copy-To Clients  
Custom Profiles  
Insurance Providers  
**Merge Patients**  
Merge List  
Short Lists  
Supply Short List

Select Merge Patients From the Master Files Drop Down Menu

BRL MRN#	Name	SITE PID	DOB	Gender	City	Primary Physician
6002719	ATLASMERGE,BRETT	ABL0999600066	08/02/1981	Male	TROY	BOYANTON JR,BOBBY L
	ATLASMERGE,CHERYL	ABL0999600078	02/02/1972	Female		
	ATLASMERGE,CHRIS	ABL0999600073	09/23/1967	Female	BERKLEY	
6002762	ATLASMERGE,CHRIS	ABL0999600082	09/23/1967	Female	BERKLEY	
6002720	ATLASMERGE,CLINT	ABL0999600067	08/03/1983	Male	TROY	BOYANTON JR,BOBBY L

# Beaumont

Search for your duplicate patients by last and first name.

When you have located the patients to be merged, click on each one (one at a time) and click on the “Mark For Patient Merge” link.

**Patients** | **Orders** | **Results** | **Master Files** | **System** | **Help** | **Previous** | **Log Out**

## Merge Patients

Patient: ATLASMERGE,CH...    DOB-Age: 09/23/1967 - BER...    ID: ABL0999600073  
Prim. Phys:    SSN:    Gender: Female

Select a Patient

Patient:            

Name	ID	SSN	DOB	Gender	MRN
ATLASMERGE,CHRIS	ABL0999600073		09/23/1967	Female	
ATLASMERGE,CHRIS	ABL0999600082		09/23/1967	Female	

Click on the patient record and then on the Mark for Patient Merge link. Do this for both records to be merged

[Mark for Patient Merge](#)

# Beaumont

Once both patient records have been marked for merging, click on the patient merge list button.

**Merge Patients**

Patient: ATLASMERGE,CH... DOB-Age: 09/23/1967 - BER... ID: ABL0999600073  
Prim. Phys: SSN: Gender: Female

Select a Patient

Patient atlasmerge, chris Search Clear Patient Merge List

Name	ID	SSN	DOB	Gender	MRN
ATLASMERGE,CHRIS	ABL0999600073		09/23/1967	Female	
ATLASMERGE,CHRIS	ABL0999600082		09/23/1967	Female	

Once both patient records have been marked for patient merge, click on the Patient Merge List button.

Mark for Patient Merge

The Patient Merge List will display, verify you have selected the correct patients and click on the Merge Patients link.

**Patient Merge**

View Patients Who Were

Patient Search Clear  Identified to be Merged  Merged  Unmerged

Name	Patient ID	DOB	Name	Patient ID	DOB	Note	User
ATLASMERGE,CHRIS	ABL0999600073	09/23/	ATLASMERGE,CHRIS	ABL0999600073	09/23/		Portal,Atlas

A list of the records to be merged will display, verify you have selected the correct patients to be merged, and click on the Merge Patients Link

Merge Patients Unmerge Patients Unmark Patients Notes

# Beaumont

The Merge Detail screen will display. By using the PID # you previously made note of, determine which record needs to be merged into which, and click the corresponding button, Merge 1 to 2; or, Merge 2 to 1. The patient missing the MRN # is always **MERGED TO** the patient with the MRN #.

**Patients** | **Orders** | **Results** | **Master Files** | **System** | **Help** | **Previous** | **Log Out**

### Merge Detail

Patient 1: ATLASMERGE,CHRIS		Patient 2: ATLASMERGE,CHRIS	
ID	ABL0999600073	ID	ABL0999600082
Phone #	(248)555-5555	Phone #	(248)555-5555
SSN		SSN	
Gender	Female	Gender	Female
DOB	09/23/1967	DOB	09/23/1967
Address	5454 SOMEWHERE STREET	Address	123 ANYWHERE STREET
City	BERKLEY		
State	MI	Zip	48072

Results to be Merged		
Date	Number	Status
11/13/2013	40000280BL09996	Sent To Lab
11/14/2013	40000300BL09996	Sent To Lab

Result Text	Result

<< Cancel | Merge 1 to 2 | Merge 2 to 1 | Unmerge

By using the previously noted PID, determine which record needs to be merged to which. In this example ID # 600082 was the record that **HAD** an MRN, so it is the record that is going to be the **MERGED TO RECORD**

So in this example patient 1 (missing the MRN) will be merged to Patient 2 (with a MRN #), leaving Patient #2 as the remaining, complete record.

# Beaumont

Once the appropriate “merge to” button has been clicked, a pop-up will display asking if you are sure you want to merge the records. Click the Yes button to continue.

The records will be merged, leaving one completely detailed record in the Patient Database. You have successfully merged the 2 patient records!

BRL MRN#	Name	SITE PID	DOB	Gender	City	Primary Physician
6002719	ATLASMERGE,BRETT	ABL0999600066	08/02/1981	Male	TROY	BOYANTON JR,BOBBY L
	ATLASMERGE,CHERYL	ABL0999600078	02/02/1972	Female		
6002762	ATLASMERGE,CHRIS	ABL0999600082	09/23/1967	Female	BERKLEY	
6002720	ATLASMERGE,CLINT	ABL0999600067	08/03/1983	Male	TROY	BOYANTON JR,BOBBY L
6002723	ATLASMERGE,DIANE	ABL0999600068	08/04/1984	Female	ROYAL OAK	BOYANTON JR,BOBBY L
6002725	ATLASMERGE,ELIZABETH	ABL0999600069	08/05/1985	Female	TROY	BOYANTON JR,BOBBY L
6002739	ATLASMERGE,FRANK	ABL0999600070	08/06/1986	Male	ROYAL OAK	BOYANTON JR,BOBBY L
6202771	ATLASMERGE,TIFFANI	ABL0999600080	10/10/1970	Female		
6001545	ATLASSOFT,A	ABL0999600004	07/01/1970	Male	GARDEN CITY	BOYANTON JR,BOBBY L
6002023	ATLASSOFT,ALLIGATOR	ABL0999600024	07/01/1972	Male	GARDEN CITY	BOYANTON JR,BOBBY L
6001546	ATLASSOFT,B	ABL0999600005	07/02/1970	Female	TROY	NURKO,SAUL
6002024	ATLASSOFT,BUTTERFLY	ABL0999600025	07/02/1972	Female	TROY	GUZMAN-MORALES,CERE
6001547	ATLASSOFT,C	ABL0999600006	07/03/1970	Male	STERLING HEIGHTS	NURKO,SAUL
6002025	ATLASSOFT,CATERPILLAR	ABL0999600026	07/03/1972	Male	ROYAL OAK	NURKO,SAUL
6001548	ATLASSOFT,D	ABL0999600007	07/04/1970	Female	ROYAL OAK	O'SHEA,MARY D

### Custom Profiles

Clients have the ability to build their own custom profiles of tests in the Atlas system. Follow these steps to create a custom profile.

Building new custom profiles.

#### 1. Click on Master Files

The screenshot shows the 'Patient Search' interface. The 'Master Files' menu item is highlighted in the top navigation bar. The main area displays a table of patient records with columns for BRL MRN#, Name, SITE PID, DOB, Gender, City, and Primary Physician. A 'Patient QuickLinks' sidebar is visible on the right.

BRL MRN#	Name	SITE PID	DOB	Gender	City	Primary Physician
6002228	A, JONE	ABL0999404186	01/01/1980	Male	TROY	
6001295	ABE, CHARLESTINA	ABL0999404186	01/01/1971	Male	TROY	
6002222	ADAMS, AMY	ADL0999400136	00/20/1970	Female	STERLING HEIGHTS	
6001130	ADAMS, JOHN	ABL0999404146	01/02/1941	Male	TROY	
6001535	ALCOTT, LOUISA MAY	ABL0999404381	11/15/1945	Female	LIVONIA	
6002952	ALTASCS, EVELYN	ADL0999400101	11/03/1967	Female		KOLINS, MARK D
6003082	ALTASCS, LISA		12/28/1988	Female	CLAWSON	
6002455	ANDREW, JULIE	ABL0999400147	07/02/1962	Female	CLAWSON	
	APPLC, CORC	ADL0999404140	04/19/1970	Male		
	ATLAS, SISELLA		03/06/1961	Female	ROYAL OAK	
	ATLAS, JUMP		10/26/1970	Female		KOLINS, MARK D
	ATLAS, JUMP	ADL0999400120	10/26/1970	Female		KOLINS, MARK D
	ATLAS, JUMP	ABL0999400124	10/26/1970	Female		KOLINS, MARK D
	ATLAS, KYLE		12/06/1967	Male	BERKLEY	
	ATLAS, LISA		04/21/1970	Female	CLAWSON	

#### 2. Click on Custom profiles

#### 3. Click on New Profile

The screenshot shows the 'Custom Profiles' interface. The 'Master Files' menu item is highlighted in the top navigation bar. The main area displays a form for creating a custom profile, including fields for Custom Profile Name, Profile Name, Profile Description, Profile Components, and Test Name. A 'New Profile' button is highlighted with a red box.

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## 4. Enter Profile Name

The screenshot shows the 'Custom Profiles' interface. At the top, there is a navigation bar with 'Patients', 'Orders', 'Results', 'User', 'Master Files', 'System', and 'Help'. A 'Required Fields' indicator is visible. Below this, there is a search bar for 'Custom Profile Name' with 'Search' and 'Clear' buttons. A table lists existing profiles, with 'P0801' shown. Below the table, the 'New Profile' form is active, with the 'Profile Name' field highlighted in yellow and a red box around it. The 'Save Profile' button is visible. Below the profile form is the 'Profile Components' section, which includes a table for 'Test Code', 'Test Name', and 'Performing Lab'. A 'Component' dropdown and a 'filter by' section (with radio buttons for 'Code', 'Name', and 'Mnemonic') are also present. On the right side, there is a 'Patient QuickLinks' panel with links for Reports, Cumulative Reports, Order History, Demographics, New Order, and New Standing Order, along with a 'Show More Links' button. Below the quicklinks are buttons for Patient Search, Order Search, Report Search, and Directory of Services.

## 5. Save the profile.

This screenshot is identical to the previous one, but the 'Save Profile' button in the 'New Profile' section is now highlighted with a red box, indicating the next step in the process. The 'Profile Name' field now contains the text 'P0451'.

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## 6. Click on New Component

The screenshot shows the 'Custom Profiles' interface. At the top, there is a navigation bar with 'Patients', 'Orders', 'Results', 'User', 'Master Files', 'System', 'Help', 'Previous', and 'Log Out'. The main content area is divided into two sections: 'Custom Profiles' and 'Profile Components'. The 'Custom Profiles' section includes a 'Required Fields' indicator, a search bar for 'Custom Profile Name', and a table listing profiles with columns for 'Profile Name' and 'Profile Description'. Below the table are input fields for 'Profile Name' (containing 'P0451') and 'Profile Description'. At the bottom of this section are buttons for 'New Profile', 'Delete Profile', and 'Save Profile'. The 'Profile Components' section has a table with columns for 'Test Code', 'Test Name', and 'Performing Lab'. Below it is a 'Component' dropdown menu, a 'filter by' section with radio buttons for 'Code', 'Name', and 'Mnemonic', and buttons for 'New Component', 'Delete Component', 'Directory of Services', and 'Save Component'. The 'New Component' button is highlighted with a red box. On the right side, there is a 'Patient QuickLinks' panel with links for Reports, Cumulative Reports, Order History, Demographics, New Order, and New Standing Order, along with a 'Show More Links' button. Below the quick links are buttons for 'Patient Search', 'Order Search', 'Report Search', and 'Directory of Services'.

## 7. Enter each component.

This screenshot is identical to the one above, showing the 'Custom Profiles' interface. The 'New Component' button in the 'Profile Components' section is highlighted with a red box. The interface includes the same navigation bar, search and table sections for profiles and components, and the 'Patient QuickLinks' panel on the right.

## 8. Save component.

**Beaumont Reference Laboratory**

Patients Orders Results User Master Files System Help Previous Log Out

### Custom Profiles

Required Fields

Custom Profile Name  Search Clear

Profile Name	Profile Description
P0451	
P0801	

Profile Name  Profile Description

New Profile Delete Profile Save Profile

### Profile Components

Test Code	Test Name	Performing Lab
-----------	-----------	----------------

Component  filter by:  Code  Name  Mnemonic

New Component Delete Component Directory of Services **Save Component**

#### Patient QuickLinks

- Reports
- Cumulative Reports
- Order History
- Demographics
- New Order
- New Standing Order

Show More Links

Patient Search

Order Search

Report Search

Directory of Services

## 9. Add components as needed.

**Beaumont Reference Laboratory**

Patients Orders Results User Master Files System Help Previous Log Out

### Custom Profiles

Required Fields

Custom Profile Name  Search Clear

Profile Name	Profile Description
P0451	
P0801	

Profile Name  Profile Description

New Profile Delete Profile Save Profile

### Profile Components

Test Code	Test Name	Performing Lab
LAB5062	Glucose	Beaumont Laboratory
LAB5084	Lipid Panel	Beaumont Laboratory
LAB5139	Complete Blood Count w Diff	Beaumont Laboratory
LAB6807	TSH Directed	Beaumont Laboratory

Component  filter by:  Code  Name  Mnemonic

New Component Delete Component Directory of Services Save Component

#### Patient QuickLinks

- Reports
- Cumulative Reports
- Order History
- Demographics
- New Order
- New Standing Order

Show More Links

Patient Search

Order Search

Report Search

Directory of Services

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## Placing an order:

1. Click on radio button Custom Profiles.

**Beaumont**  
Reference Laboratory

Patients | Orders | Results | User | Master Files | System | Help | Previous | Log Out

Patient: SOFTTEST,KARRI    DOB-Age: 07/15/1963 - 50 Y    ID: ABL0999404369  
Prim. Phys: KOLINS,MARK D    SSN:    Gender: Female  
Ord. Phys: KOLINS,MARK D    Order #: 400019628L09994

**New Order**

Order Info | Tests | Diagnosis Codes | Questions

Order Tests From:  Directory of Services  Custom Profiles

Custom Profiles: [Dropdown]

**Short List (Custom Profiles)**

P0801     P0451

Ordered Test	Code	Priority
--------------	------	----------

[Delete All Tests](#)   [Directory of Services](#)

[Copy Results To](#)     

**Patient QuickLinks**

- Reports
- Cumulative Reports
- Order History
- Demographics
- New Order
- New Standing Order

[Show More Links](#)

2. Click on profile.

Note: A check mark will not appear in the profile.

**Beaumont**  
Reference Laboratory

Patients | Orders | Results | User | Master Files | System | Help | Previous | Log Out

Patient: SOFTTEST,KARRI    DOB-Age: 07/15/1963 - 50 Y    ID: ABL0999404369  
Prim. Phys: KOLINS,MARK D    SSN:    Gender: Female  
Ord. Phys: KOLINS,MARK D    Order #: 400019628L09994

**New Order**

Order Info | Tests | Diagnosis Codes | Questions

Order Tests From:  Directory of Services  Custom Profiles

Custom Profiles: [Dropdown]

**Short List (Custom Profiles)**

P0801     P0451

Ordered Test	Code	Priority	Delete
Lipid Panel	LAB5084	Routine	Delete
Complete Blood Count w Diff	LAB5139	Routine	Delete
Glucose	LAB5062	Routine	Delete
TSH Directed	LAB6807	Routine	Delete

[Delete All Tests](#)   [Directory of Services](#)

[Copy Results To](#)     

**Patient QuickLinks**

- Reports
- Cumulative Reports
- Order History
- Demographics
- New Order
- New Standing Order

[Show More Links](#)

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## 3. Proceed with order.



[Patients](#) | [Orders](#) | [Results](#) | [User](#) | [Master Files](#) | [System](#) | [Help](#) | [Previous](#) | [Log Out](#)

**New Order**

 Patient: SDFTEST,KARRI    DOB-Age: 07/15/1963 - 50 Y    ID: ABL0989404369  
 Prim. Phys: KOLINS,MARK D    SSN:    Gender: Female  
 Ord. Phys: KOLINS,MARK D    Order #: 400018626L0393d

[Order Info](#) | [Tests](#) | [Diagnosis Codes](#) | [Questions](#)

**Apply Diagnosis Codes to Selected Tests**

Ordered Test	Diagnosis Codes
Lipid Panel	V70.0
Complete Blood Count w Diff	V70.0
Glucose	V70.0
TSH Directed	V70.0

[Delete Diagnosis Codes](#)

Diagnosis Code:  filter by:  Code  Name  Mnemonic

**Short List**     Site     Physician     Patient     Specialty

<input type="checkbox"/> 250.00 DIABETES UNCO...	<input checked="" type="checkbox"/> V70.0 ROUTINE MEDICAL...	<input type="checkbox"/> 272.9 UNS DISORDER LI...	<input type="checkbox"/> 285.9 ANEMIA UNSPECIF...
<input type="checkbox"/> 00.09 OTHER THERAPEUT...	<input type="checkbox"/> 477.9 ALLERGIC RHINITI...	<input type="checkbox"/> 276.51 DEHYDRATION	<input type="checkbox"/> 011.12 TB OF LUNG NOD...
<input type="checkbox"/> 692.89 CONTACT DERMA...	<input type="checkbox"/> 008.63 ENTERITIS NORW...	<input type="checkbox"/> 716.24 ALLERGIC ARTHR...	<input type="checkbox"/> 078.6 HEMORRHAGIC NE...
<input type="checkbox"/> 276.2 ACIDÓSIS	<input type="checkbox"/> 00.31 CAS W CT/CTA	<input type="checkbox"/> 780.79 OTHER MALAISE ...	<input type="checkbox"/> 00.13 INJECT/INFUS NES...
<input type="checkbox"/> V58.61 ENCOUNTER LON...	<input type="checkbox"/> 00.71 REV HIP REPL-ACE...	<input type="checkbox"/> 00.34 IMAGELESS COMP ...	<input type="checkbox"/> 00.10 IMPLANT CHEMOTH...

[Copy Results To](#)       

**Patient QuickLinks**

- [Reports](#)
- [Cumulative Reports](#)
- [Order History](#)
- [Demographics](#)
- [New Order](#)
- [New Standing Order](#)

[Show More Links](#)

[Patient Search](#)

[Order Search](#)

[Report Search](#)

[Directory of Services](#)

## Frequently Asked Questions

### Making Order Changes

**Q: Can an office delete a saved order within Atlas?**

A: No, a saved order cannot be cancelled through the Atlas system. To delete or cancel an order that has been sent to the laboratory, please call Customer Service at (800)-551-0488.

**Q: Can an office delete a test from an order?**

A: It depends on the status of the order:

If the order has not been saved, you can go back to the Tests tab and remove the test by clicking on the delete button for that test.

If the order has been saved, but the specimens and paperwork are still in the office, cross off the test on the request form (draw a single line through it), write cancel next to the test order and your initials next to it. The laboratory processing department will cancel the electronic order for that test.

If the specimens and paperwork have already gone to the laboratory, please call Customer Service at (800)-551-0488.

If in doubt as to the proper procedure, please call Customer Service at (800)-551-0488.

### Pending Lists and Manifests

**Q: What is the difference between an Order Manifest and a Pending List?**

A: Manifests are lists of work sent to the lab on a particular day, while a Pending List is a cumulative list of all orders with work still outstanding at the laboratory.

Manifests list the orders and specimens that are included in each shipment to the laboratory. Every time the *Send to Lab* function is performed (either automatically, or manually); the system sends the processed orders to a manifest. You can print out the manifests for use as an in-office log to track that your office receives the expected reports for each order sent to the laboratory.

A Pending Test List is a comprehensive listing of orders selected by a date range that do not have the order status of "Final".

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## Printing How To's

### Q: How do I print a manifest?

A: On the *Orders* menu select *Manifest*. From this screen you can view and print individual manifests, or print all manifests for a particular date.

**Beaumont Reference Laboratory**

Patients Orders Results User Master Files System Help Previous Log Out

**Manifests**

Manifest Search Criteria

Manifest Number: [ ] Location: [ ]

From: [ ] To: [ ]  New Search Clear

Date	Time	Sent To	Ordering Location	Manifest #	New
09/25/13	15:20	Beaumont Laboratory	SLAB - Test Practice	28	Yes
09/24/13	15:40	Beaumont Laboratory	SLAB - Test Practice	27	Yes
09/24/13	15:06	Beaumont - Microbiology	SLAB - Test Practice	26	Yes
09/24/13	15:06	Beaumont Laboratory	SLAB - Test Practice	25	Yes
09/24/13	09:50	Beaumont Laboratory	SLAB - Test Practice	24	Yes
09/18/13	09:40	Beaumont Laboratory	SLAB - Test Practice	23	Yes
08/30/13	13:10	Beaumont - Microbiology	SLAB - Test Practice	22	Yes
08/30/13	12:59	Beaumont - Microbiology	SLAB - Test Practice	21	Yes
08/30/13	12:50	Beaumont - Microbiology	SLAB - Test Practice	20	Yes
08/27/13	14:40	Beaumont - Microbiology	SLAB - Test Practice	19	Yes
08/27/13	13:20	Beaumont - Microbiology	SLAB - Test Practice	18	Yes
08/27/13	12:20	Beaumont Laboratory	SLAB - Test Practice	17	Yes
08/14/13	12:55	Beaumont Laboratory	SLAB - Test Practice	16	No
08/14/13	12:49	Beaumont Laboratory	SLAB - Test Practice	15	No

Manifest List Manifest Layout Manifest

Print Coalesced Manifest Print All Manifest

Access "Manifests" from the "Orders" menu. From this screen you can print a single manifest listing orders and specimens in a shipment, or all the manifests from a particular date.

**Beaumont Laboratory**

Shipping Manifest #28 [09/25/2013 15:20]  
PRINTED ON: 09/25/2013 AT 16:03

From	BL Slab - Test Practice	To	Beaumont Laboratory
ID	BL08888	Address	3601 W. Thirteen Mile Road Royal Oak, MI 48073
Location	SLAB - Test Practice		
Address			

Lab Order #	Patient Name	Order Text	Specimen	Temperature	Account #	Code	Packing Slip #	Patient ID	Specimen #
1	4000001255BL08	TEST,LOGAN	Complete Blood Count	Ref 1.08 Whole blood	Refrigerated	SLAB - Test LAB5141	45	ABL088880000	4000001255BL08

The manifest printout will list each order with details of test, patient, specimen, order number and other information.

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Q: How do I print a pending list?

A: Select *Order Search* from the *Orders* menu.

Select the *Search Criteria* tab; enter the desired date range for the selected parameter you wish to search for.

Check off the *Pending Results* box.

Click on the *Search* button.

A list of pending orders for the selected parameters will display, click on the *Pending Tests* option to print the list of pending orders.

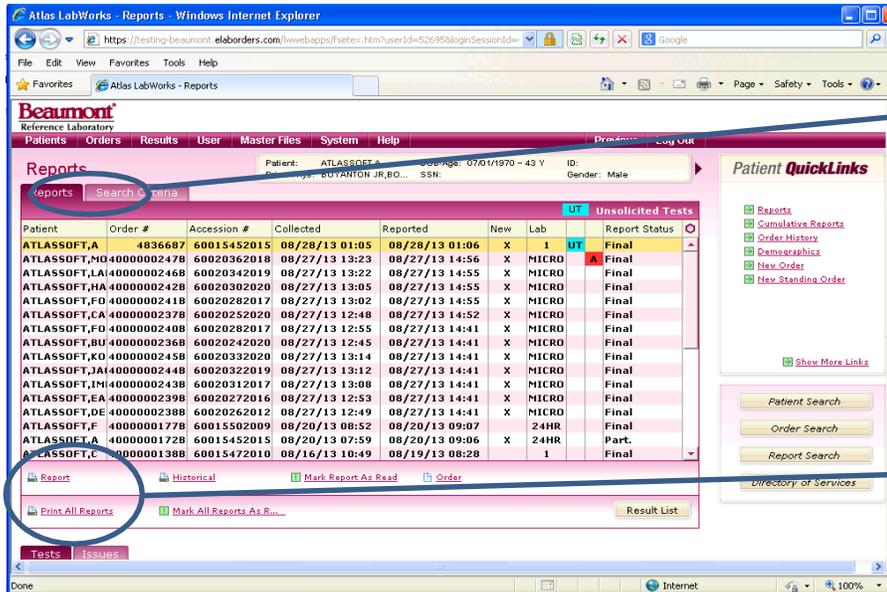
Collect...	Order	Order Status	Name	ID	Acct	Phys	Type	P/S	Stat Orders	SO
11/25/13	4000001377BL0888	Sent To Lab	ALLERGY,A	ABL0888800	BL088BL	BLENC,ANN MAI	Account			
11/22/13	4000001376BL0888	Sent To Lab	TEST,AAA	ABL0888800	BL088AARON,ARNOLC	Medicare				
11/22/13	4000001375BL0888	Partially Comple	SOFTLABMU,SEVEN	ABL0888800	BL088KOLINS,MARK	Account				
11/22/13	400676516BL0888	Partially Comple	SOFTPATHMU,GEN	ABL0888800	BL088KOLINS,MARK	Account				
11/22/13	4000001374BL0888	Received By Lab	SOFTMICMU,CARMEN	ABL0888800	BL088PANSARE,VAISI	Account				
11/21/13	4000001372BL0888	Partially Comple	SOFTMICMU,CARMEN	ABL0888800	BL088KOLINS,MARK	Account				
11/20/13	400676107BL0888	Partially Comple	SOFTTEST,AMANDA	ABL0888800	BL088BLENC,ANN MAI	Account				
11/20/13	400676058BL0888	Partially Comple	SOFTPATHMU,GEN	ABL0888800	BL088KOLINS,MARK	Account				
11/19/13	400675922BL0888	Partially Comple	SOFTPATHMU,GEN	ABL0888800	BL088KOLINS,MARK	Account				
11/18/13	400675885BL0888	Partially Comple	SOFTPATHMU,GEN	ABL0888800	BL088KOLINS,MARK	Account				
11/15/13	400675516BL0888	Partially Comple	SOFTMEANINFULUSE,T	ABL0888800	BL088BLENC,ANN MAI	Account				
11/15/13	400675504BL0888	Partially Comple	SOFTMEANINFULUSE	ABL0888800	BL088BLENC,ANN MAI	Account				
11/13/13	400675378BL0888	Partially Comple	SOFTMEANINFULUSE	ABL0888800	BL088BLENC,ANN MAI	Account				
11/07/13	400674950BL0888	Received By Lab	SOFTTEST,ENSEMBLE	ABL0888800	BL088KRASNICK,JANE	Account				
11/04/13	4000001368BL0888	Partially Comple	SOFTTEST,MICHAEL	ABL0888800	BL088KOLINS,MARK	Account				
11/01/13	400674639BL0888	Partially Comple	SOFTTEST,MICHELLE	ABL0888800	BL088KOLINS,MARK	Account				
11/01/13	400674609BL0888	Received By Lab	SOFTMEANINFULUSE	ABL0888800	BL088KOLINS,MARK	Account				

Q: Can I print patient reports to a PDF file from Atlas?

A: At this time Atlas does not have that capability. We hope to be able to provide that function at some time in a future version.

## Q: How do I print a patient report?

A: From the Screen view of the desired report, click on the *Print Report* option, the printing screen will display, select the appropriate printer and options and click on the *Print* button. By clicking on the *Print All Reports* option you can also print all the reports defined to the list by the *Search Criteria* tab.

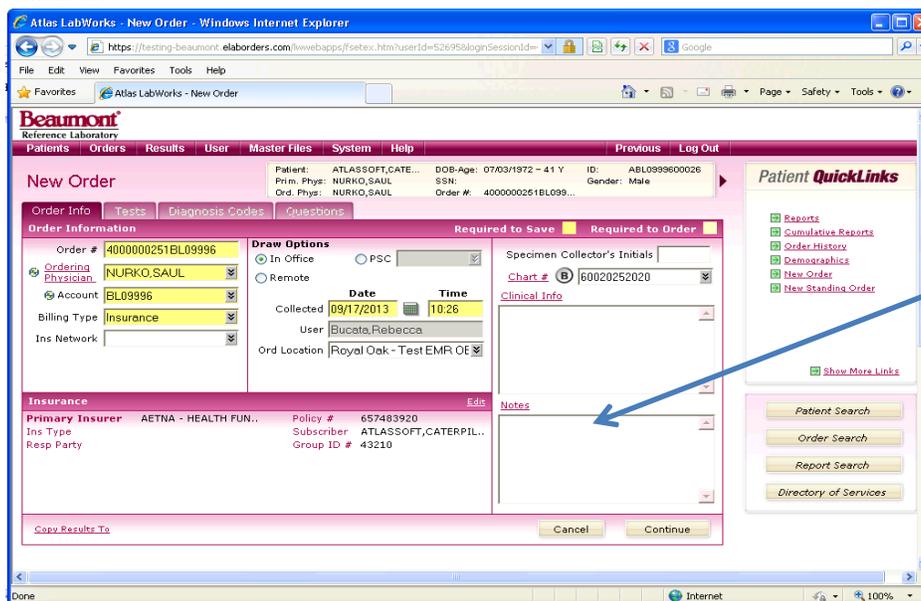


Use the "Search Criteria" tab to define the reports you wish to view or print. The reports meeting the defined criteria will display on the "Reports" tab.

Highlight an individual report by clicking on it and view or print it by clicking on the arrow next to the "Report" option and choosing your option. Print all the reports defined in your search by clicking the "Print All Reports" option.

## Q: How do I have a copy of the report sent to a Physician outside my practice?

A. If you know that a copy of the test results needs to be sent to a Physician outside of your office, you can request that the laboratory send a report directly to the physician by placing instructions in the Notes section of the New Order screen. Include the Physician's Name, full address, and telephone number.



Place requests for report copies to another Physician in the Notes box of the Order Info Screen. Include Physician name, address, and phone number

## Q: How do I print another copy of a requisition?

A: Your account will be set up to automatically print the order requisitions, but should you need to reprint one or more requisitions, follow this process:

On the *Patient Search* menu locate and highlight your patient and select *Order History*, then hit enter. Once the patient is selected, go to *Patients* and select *Order History*, and hit enter, the order history on that patient will display. Click on the order that you need to reprint the requisition for, it will highlight, and then click on the requisition icon. The requisition will be sent to the printer.

The screenshot shows the Atlas LabWorks Order History interface. The patient information is ATASSOFF, ALLIGATOR, DOB: 07/01/1972, Age: 41 Y, ID: ABL0988800392, Gender: Male. The table below shows several orders, with the first one highlighted. A blue callout box points to a requisition icon in the table.

Order #	Req #	Status	Collected	Ord Phys	Accn #	User
4000001366BL08888	121	Not Sent To Lab	10/29/13 15:54	BOYANTON JR, BOB		Bucata, Rebecca
4000001349BL08888	120	Sent To Lab	10/10/13 10:42	MILOVANOVIC, ALE		Henderson, Karri
4000001339BL08888	118	Sent To Lab	10/09/13 10:42	MILOVANOVIC, ALE		Henderson, Karri
4000001310BL08888	93	Sent To Lab	10/03/13	VONNE F	60020232033	Henderson, Karri
4000001306BL08888		Final	10/03/13	OVIC, ALE		Henderson, Karri
4000001305BL08888	90	Sent To Lab	10/03/13	WN MARIE		Henderson, Karri
4000001304BL08888	89	Sent To Lab	10/03/13	WN MARIE		Henderson, Karri
4000001302BL08888	84	Sent To Lab	10/03/13	WN MARIE		Henderson, Karri

Reprint a requisition by accessing *Order History* for the selected patient on the *Patients* menu. Click to highlight the desired order and click on the requisition icon. The requisition will be printed.

## Q: Why do multiple requisitions print for one patient's orders?

A: Testing requirements may cause the orders for a single patient to print on multiple request forms, this can be due to:

**Specimen Transport Requirements** – each type of transport requirement, i.e. room temperature, frozen, or refrigerated will generate its own request form so that the specimen is never separated from its appropriate paperwork.

**Microbiology Orders, Anatomic Pathology, and Cytology Orders** – all of these order types generate separate individual request forms due to system requirements within the laboratory itself. There is a limit of one order per request form for each of these order types.

**24 Hour Urine Collections** – because these tests often arrive at the lab at a later time than the other tests ordered on the patient, 24 hour urine test orders print on their own request form.

**Different Specimen Priorities** – specimens that are ordered as STAT will print separately from orders that are not ordered as STAT. **When placing orders on one patient and**

some tests are STAT, while others are routine priority, please bag the STAT orders separately from the routine orders, but staple all bags belonging to the same patient together. This will ensure proper handling at the lab.

## Q: How do I reprint Specimen Labels?

A: Your specimen labels should prompt to print automatically, but should you need to reprint labels follow this process:

On the *Patient Search* menu locate and highlight your patient and select *Order History*, then hit enter.

Once the patient is selected, go to *Patients* and select *Order History*, and hit enter, the order history on that patient will display. Click on the order that you need labels for, it will highlight, then click on the *Specimen Label* option located at the bottom left of the screen and the label options screen will display, adjust the number of label sets to print if necessary, then click the OK button in the Print Labels pop-up to reprint the labels.

Order #	Req #	Status	Collected	Ord Phys	Accn #	User
4000001366BL08888	121	Not Sent To Lab	10/29/13 15:54	BOYANTON JR, BOB		Buchner, Rebecca
4000001349BL08888	120	Sent To Lab	10/10/13	OVIC, ALE		Henderson, Karri
4000001339BL08888	118	Sent To Lab	10/09/13	OVIC, ALE		Henderson, Karri
4000001310BL08888	93	Sent To Lab	10/03/13	VONNE F		Henderson, Karri
4000001306BL08888		Final	10/03/13	OVIC, ALE	60020232033	Henderson, Karri
4000001305BL08888	90	Sent To Lab	10/03/13	YN MARIE		Henderson, Karri
4000001304BL08888	89	Sent To Lab	10/03/13	YN MARIE		Henderson, Karri
4000001302BL08888	86	Sent To Lab	10/03/13	YN MARIE		Henderson, Karri

Specimen #	Label receipt	Type	Container
4000001366BL08888-1		Whole blood	Lav EDTA

Select the Order History option in the "Patients" menu and highlight the desired order. Click on the "Specimen Label" option to reprint the labels.

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## Insurance

### Q: My patient's insurance is not in Atlas, how do I enter it?

A: At times you may encounter patients who have health insurance plans that are not part of a large national company. Within the Atlas system such insurance plans are termed "Local Insurances" and will probably not be found within your account database. These insurance providers and the subscriber information necessary to submit billing to the insurance provider can be entered into the system and saved for future use.

You can add a local provider type of insurance through the Local Insurance Providers function. On the *Master Files* menu click on *Local Insurance Providers*, the screen for this option will open. Click the *New Provider* link to clear all fields and add another local insurance provider; or select a provider from the drop down list to display and edit the provider details.

Enter the required information and other pertinent information about the new insurance provider; or edit the selected Provider's information as necessary.

After adding or editing provider information, click the *Save* button to store the insurance information.

Click the *Insurance* tab.

Select an option for the type of providers to display.

Select a Primary Insurance provider from the drop-down list.

Enter the policy number.

Enter Secondary Insurance provider information if applicable.

Click **Save**.

The screenshot shows the 'Insurance Providers' section of the Atlas LabWorks Patient Demographics interface. The 'Primary Insurer' section is highlighted in yellow, indicating required fields. The form includes the following fields and values:

- Insurer: AETNA - CHOICE POS II
- Network: [Dropdown]
- Responsible Party (L F MI): TEST, BECKY
- Issue Date: [Field]
- Expires: [Field]
- Subscriber (L F MI): TEST, BECKY
- Address: [Field]
- City, State ZIP Code: [Field]
- Employer: [Field]
- Status: [Field]
- Policy #: 9999999
- Group ID #: [Field]
- Lab: [Field]
- Relationship: Self
- Gender: [Field]
- SSN: [Field]
- DOB: 03/22/1993
- Phone: [Field]

A 'Save' button is located at the bottom right of the form.

On the "Insurance" tab fill in the required (yellow) fields, and provide as much of the additional information as available. Click "Save" to complete the process. Your patient has now been entered into the system.

## Q: How do I update a patient's insurance?

A: You can update the patient's insurance in the client record by going to the insurance tab and clicking the link "clear insurer data" and then entering the new insurance. Continue the order process and save the order. This will save the change in your client file only. Be sure to send a copy of the Patient's ID and new insurance card with the paperwork and specimens and indicate that it is new insurance. The laboratory will forward the copies on to the billing department so that the patient's hospital file can be updated.

The screenshot displays the Beaumont Reference Laboratory web interface. At the top, there are navigation tabs for Patients, Orders, Results, Master Files, System, and Help. The patient information section shows: Patient: ATLASSOFT, BUT...; DOB-Age: 07/02/1972 - 41 Y; ID: ABL0999400005; Prim. Phys: PLAWNY-LEBENB...; BRLMRN: 6002024; Gender: Female. The 'Insurance Providers' section is active, showing a primary insurer 'HAP - POS OPEN DELIVERY'. A red circle highlights the 'Clear Insurer Data' link. A blue callout box on the right contains the text: 'The "Clear Insurer Data" link will erase the existing patient insurance information and allow you to enter the new insurance in the patient's file at the client site.'

If the record mismatch screen appears during the insurance update process, be sure to review the information carefully, if the PCR information already contains the new insurance information, and then accept the update. If the information from the PCR is not the new information, click ignore to save your newly entered insurance data.

## Placing Orders

### Q: How do I order a biopsy?

A: Test name is: Surgical Pathology Tissue

The screenshot shows the 'New Order' interface. At the top, patient information is displayed: Patient: ATLASOFT,TESTI..., DOB-Age: 01/01/1970 - 44 Y, ID: ABL0999404462, Prim. Phys: SYKES,ELIZABETH, SSN: , Gender: Female, Ord. Phys: SYKES,ELIZABETH, Order #: 40002068BL09994. Below this, there are tabs for 'Order Info', 'Tests', 'Diagnosis Codes', and 'Questions'. The 'Tests' tab is active, showing a search for 'surgical' with filter options for 'Code', 'Name', and 'Mnemonic'. A table below the search shows the results for 'Surgical Pathology Tissue' with Code 'LAB6798' and CPT field.

Short	Test Name	Code	CPT
	Surgical Pathology Tissue	LAB6798	

On the Question tabs are multiple fields to enter the specimen source(s). When submitting multiple specimens under the same biopsy order, fill in the source fields and label the corresponding specimen container with the alphabetical letter matching the field you placed the source into.

The screenshot shows the 'Test Level Questions' form for 'Surgical Pathology Tissue / LAB6798'. The form contains several input fields for specimen sources and clinical information:

APS Source A		APS Source B	
APS Source C		APS Source D	
APS Source E		APS Source F	
APS Source G		APS Source H	
APS Source I		APS Source J	
APS Source K		APS Source L	
APS Clinical History		APS Pre/Post OP Diagnosis	
APS Additional Comments			

### Q: How do I order a Microbiology test?

A: Microbiology tests are ordered in the same manner as all other tests, but you do have to provide the specimen source on each microbiology test ordered. You answer this question on the questions tab of the order process.

If ordering a culture test, it is easier to search by test name by entering the word "Culture" in the search field; this will bring up a list of the different culture types available for ordering.

## Q: How do I order a cytology urine test?

A: Test name is Cytology Medical (Non-Gyn/FNA), be sure to enter Urine as the specimen source.

The screenshot shows a 'New Order' form with patient information at the top: Patient: ATLASSOFT,TESTI..., DOB-Age: 01/01/1970 - 44 Y, ID: ABL0999404462, Prim. Phys: SYKES,ELIZABETH, SSN: [redacted], Gender: Female, Ord. Phys: SYKES,ELIZABETH, Order #: 40002068BL09994. Below this are tabs for 'Order Info', 'Tests', 'Diagnosis Codes', and 'Questions'. The 'Tests' tab is active, showing 'Order Tests From: Directory of Services' and 'Custom Profiles'. A search bar contains 'cytology' and filter options for 'Code', 'Name', and 'Mnemonic'. A table lists search results with columns for 'Short', 'Test Name', 'Code', and 'CPT'. The first result is 'Cytology Medical (Non-Gyn/FNA)' with code 'LAB6797'. Below the table is a form for 'Cytology Medical (Non-Gyn/FNA) / LAB6797' with fields for 'Specimen source', 'Specimen site', 'Clinical hx (ex: Hx of malignancy)', and 'Additional comments'.

## Q: How do I order GC/Chlamydia Screening in Conjunction with PAP Smear Orders?

A: Unlike the HPV test request question the Pap Ct/NG test request question does not order a GC Screening test. The reason for this is due to that the HPV test is part of the Pap report, when requested together. GC/Chlamydia Screening results are reported separately through a different module of the laboratory computer system

**If you wish to order the GC/Chlamydia Screening test off of a swab and the Pap from a ThinPrep vial:** Order one of the three individual Molecular tests for the GC/Chlamydia Screening tests (ICNG, INGG, ICTG) and provide a source of Swab. Additionally, also order Pap (Thin Prep) or PAPT and answers the collection question for "CT/NG Request" as "None" Since the screen is being performed from the swab.

**If you wish to order a GC/Chlamydia Screening test and a Pap from just the ThinPrep vial:** Order one of the three individual Molecular tests for the GC Screening tests (ICNG, INGG, ICTG) and provide a source of ThinPrep. Additionally, order Pap (Thin Prep) or PAPT and answers the collection question for "CT/NG Request" as either "Ct/Ng", "Ct Only" or "Ng Only" and NOT "None".

## Q: How do I order a miscellaneous sendout test?

A: Miscellaneous sendout tests are ordered using the same process as all other test orders, by searching for the actual test name. Use the link to the Beaumont LTD to assist you with finding your test and its testing requirements. To link to the **Beaumont Laboratory Test Directory** website from the Test tab of the order process, click the quick link in the right hand column of the screen for the "Directory of Services" menu by clicking the link on the top right corner of the selected test information. This will take the user to the **Beaumont Laboratory Website** and the **Laboratory Test Directory** where they may access fully detailed information on the test.

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From the displayed information on the test selected in the Directory of Services screen, the user can directly access the Beaumont Laboratory website with the on-line Laboratory Test Directory. Click the link titled Beaumont LTD to access this feature.

If searching the Directory of Services does not provide you with the needed information, please call Beaumont Laboratory Customer Service at (800)-551-0488 for assistance.

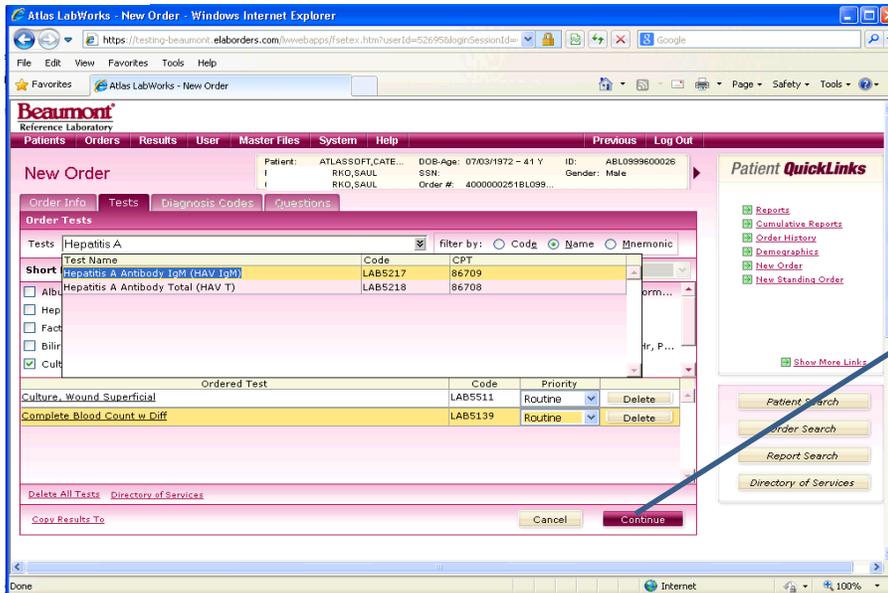
## Q: I cannot find a test in Atlas, what is the best way to look?

A: Tests frequently ordered at this site display on the *Short List* section of the screen, other tests can be found by use of the search function. The user may search via “Code” (the EPIC test code), “Name” (the test name), or “Mnemonic” (the Soft test ID). For this example we will select *Name* as the search criteria, and type in the test name. A list of test options will display. Below we have selected the tests *Culture, Wound Superficial*, and *Complete Blood Count*. In the second screen we are searching for tests with the name *Hepatitis A*. once all the needed tests have been selected, click the *Continue* button to proceed to the next step. Select the test priority (routine or STAT) in the priority field of the ordered test display.

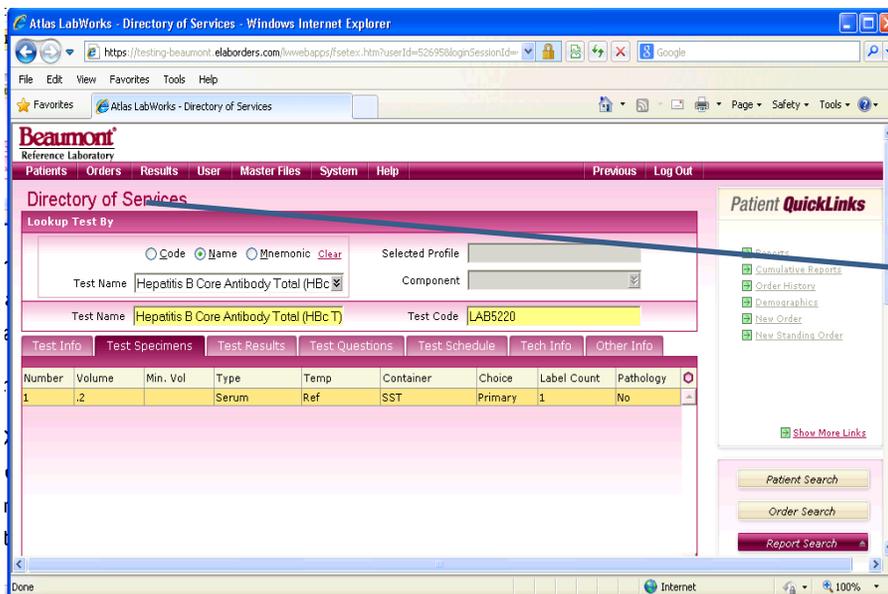
You can search for a test by typing in the test name here and clicking the downward arrow in the field. A list of tests matching the name will display.

You can select a test by checking off the box next to a test name in the Short List of tests. The Short List compiles itself based on the tests you frequently order. When you first begin to use the Atlas product the Short list will be empty and will build itself as you begin ordering tests on patients.

You can designate the test's order priority (routine, STAT) by selecting it from the drop down menu in the priority box.



At times, it may be desirable to determine the test specimen requirements, test name, schedule of testing in the laboratory, or other details regarding the desired test prior to placing a test order. These details can be found by searching the *Directory of Services* option found on the *Orders* menu. In the below example we have searched the directory of services for test names containing the word “hepatitis” and selected the test “Hepatitis B Core Antibody”. The *Test Specimens* tab in the directory of services for this test shows what the specimen requirement is, the type of container (tube), volume required for testing, and storage transport requirements.



Once you have located the correct test, and reviewed the information you were seeking, you can add the test to your order process by clicking on the *Add Test to Order* button. The test will be added to your order, a notification box stating the test was added to the order will pop-up. Click on the OK button in the pop-up message to close the pop up and on the X (close window) button in the top right corner of the *Directory of Services* screen.

Add the selected test from the Directory of Services by clicking on the *Add Test to Order* button

**Q: How do I find the correct name of a test or its specimen requirements?**

A: If the user has doubts or needs further information on the desired test, they can also link to the **Beaumont Laboratory Test Directory** website by clicking the link on the top right corner of the selected test information. This will take the user to the **Beaumont Laboratory Website** and the **Laboratory Test Directory** where they may access fully detailed information on the test.

From the displayed information on the test selected in the Directory of Services screen, the user can directly access the Beaumont Laboratory website with the on-line Laboratory Test Directory. Click the link titled Beaumont LTD to access this feature.

If searching the Directory of Services does not provide you with the needed information, please call Beaumont Laboratory Customer Service at (800)-551-0488 for assistance.

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## Making Changes to Patient Information

### **Q: How do I update a patient's name in Atlas?**

A: Because the patient's records are linked to the Hospital Patient Database via the Patient Centric Repository, clients cannot make changes to a patient's name as this could lead to discrepancies in the Hospital Medical Record. Please call Beaumont Laboratory Customer Service at (800)-551-0488 for assistance. You may be asked to fax or enclose copies of the patient's Legal ID (driver's license or state ID, court order of name change, etc. and insurance card) so that the Beaumont Registration Department can make the change to the patient's medical record.

### **Q: I made a mistake on a patient's information, can I delete the saved new patient record and start over?**

A: Because the patient's records are linked to the Hospital Patient Database via the Patient Centric Repository, clients cannot delete a patient record as this could lead to discrepancies in the Hospital Medical Record. Please call Beaumont Laboratory Customer Service at (800)551-0488 for assistance. The Client Service Representative will assist you by deleting the incorrect record.

*\*\*\* Note: Records already linked to patient result reports cannot be deleted. If a correction is needed in Patient Name, please call Beaumont Laboratory Customer Service at (800)551-0488 for assistance. You may be asked to fax or enclose copies of the patient's Legal ID (driver's license or state ID, court order of name change, etc. and insurance card) so that the Beaumont Registration Department can make the change to the patient's medical record.*

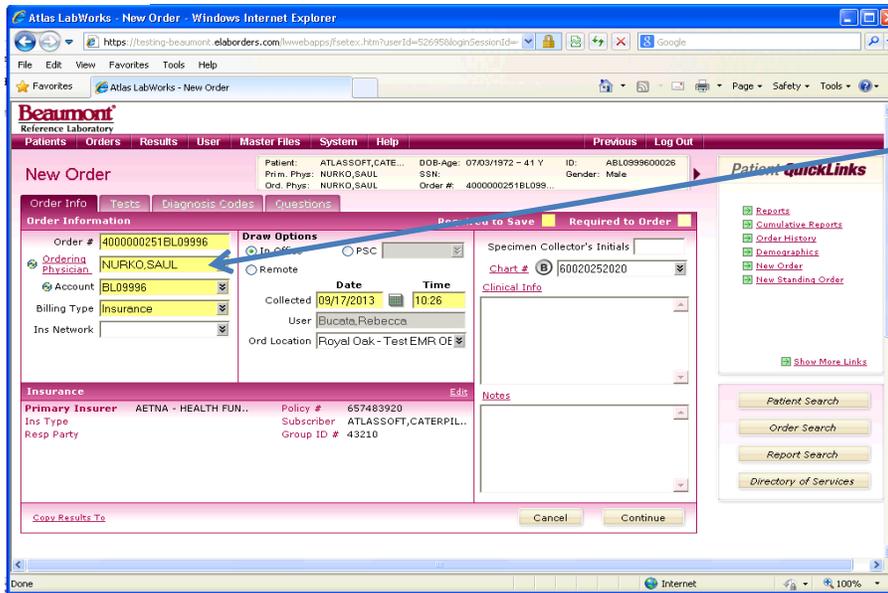
## Changes to Client Files

### **Q: How do I add a Doctor to our Ordering Physicians List?**

A: If you have added or changed staff within your practice, and find that not all of the Physicians in your practice are listed in the dropdown menu for "Ordering Physician" please follow the following steps to have the physician added to your Client Account setup:

- 1 Choose one of the physicians on the dropdown list for use in completing the in progress order.
- 2 On the paper requisition, cross out the Doctor information and handwrite the correct information.
- 3 Call Beaumont Laboratory Client Service at 1-800-551-0488 and put in a request to have the Physician added to your Client Files in Atlas.

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If you are missing one or more physicians in the drop down menu, choose a physician on the list, add the correct information to the request form and call customer service to have the Physician added to your account.

## Atlas Performance on Office PC's or Networks

### **Q: Why can't I have Atlas on more than one PC in an office?**

A: If Atlas were installed on more than one user terminal within the same office, then every time anything was triggered to print, it would print at each workstation, leading to waste of materials as well as confusion and possible duplicate or missed orders.

## Getting Help

For individualized assistance in using the Atlas system, contact Beaumont Laboratory Client Service Department at (800)-551-0488, and a Customer Service Representative will assist you.

For User Name/Password/Login issues that prevent you from signing into the Atlas system, please call the Beaumont Information Technology Help Desk at (248)-597-2727.