# Consultations: Beaker AP Guide:
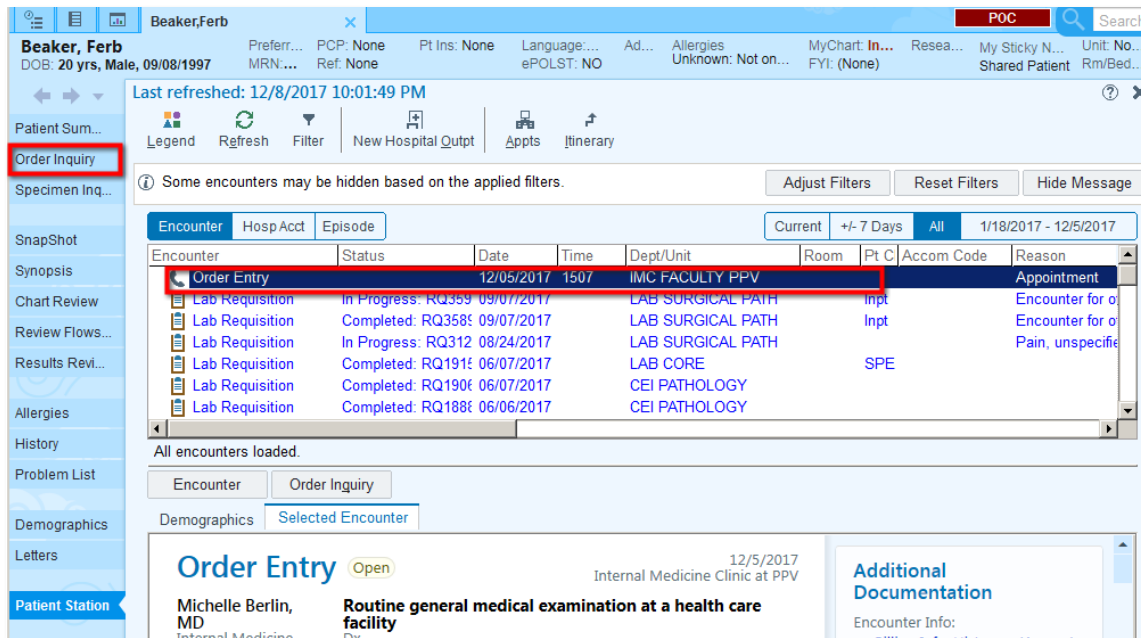
Accessioning and Building a Case
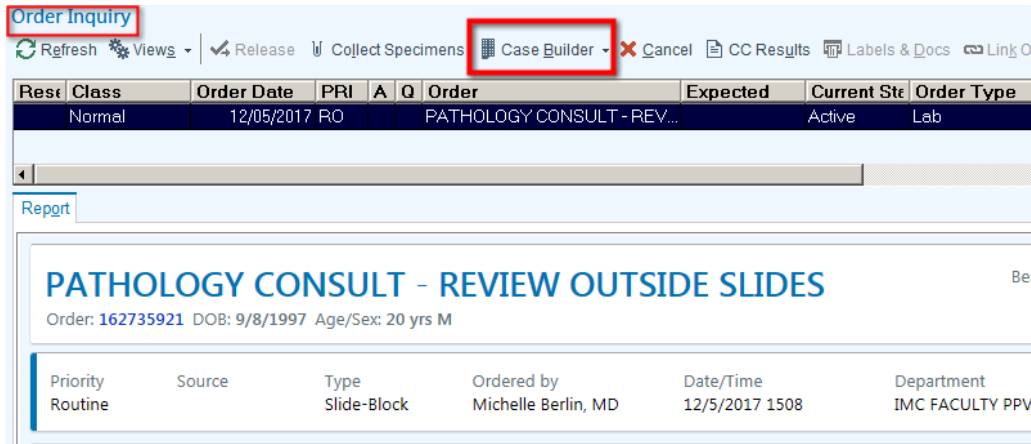
Creating a case for a clinic consult:

1. Usually orders will print out from different clinics. When the slides are delivered, the paperwork is matched with the slides.

2. In Beaker, go to the **Patient Station** activity. There is a link to **Patient Station** on your Beaker AP Lab Dashboard or you can use the **Patient Station** button at the top of your screen.
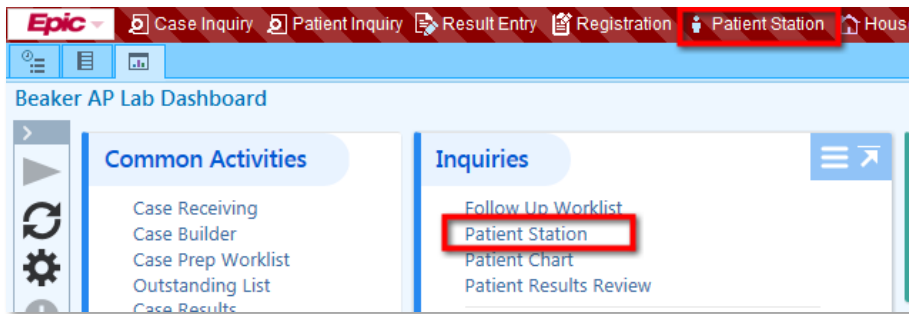
3. Search for the patient listed in your orders. In **Patient Inquiry**, look for the **Order Entry** row that corresponds to the order. Select that row and click on the **Order Inquiry** tab at the left.

4. When you are in **Order Inquiry**, click on the ⊞ **Case Builder** button. Choose "➕ **New Case**".

5. Skip to the **Using Case Builder** section of this guide for instructions on working in ⊞ **Case Builder**.

Creating a consult case for an outside submitter:

1. When outside hospitals or clinics want a 2nd opinion or have slides for review, the consult is entered in **Requisition Entry**. Use Chart Search to open **Requisition Entry** or find the link to **Requisition Entry** from your AP Lab Beaker Dashboard.

2. The patient will usually need to be registered at OHSU so they can be searched for in the database system. Type "**OHSU Patient**" in the **Submitter** field.

3. In the **Patient** field: Search for the patient name, with the format "Lastname, Firstname." Make sure to search for a pre-existing patient using multiple identifiers.

4. Enter the outside submitter's case number in the **Ref. Lab No.** field.

5. Enter the diagnosis code in the **Code** field and authorizing provider in the **Authorizing provider** field.

6. In the **Bill to:** field: usually this will be **Patient Bill.** Some industrial submitters will auto populate this field with "Client Bill".

7. In the **Procedure** field, enter "PCON" and press Enter. Choose "PCON (aka PATHOLOGY CONSULT-REVIEW OUTSIDE SLIDES.).
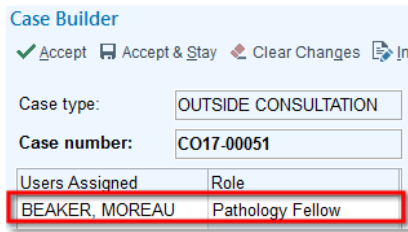

8. In the **# of Spec.** field: type "1"

9. When the form is filled out, click ▦ **Case Builder** button to begin processing the case.
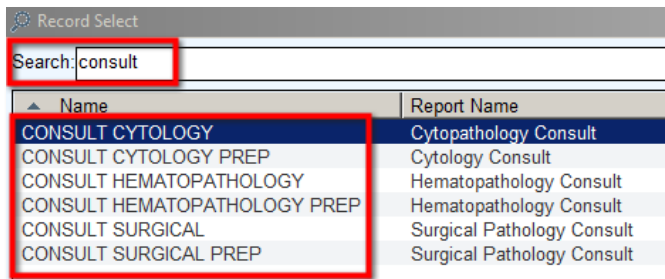
Using Case Builder:

1. At the **User Assigned** and **Role** field, assign the appropriate fellow who will be reviewing the case.

Adding Specimens:

2. In the **Add Specimen** field of Case Builder, search for "consults" in the **Protocol** field. There are 6 choices for consults, choose from the following.
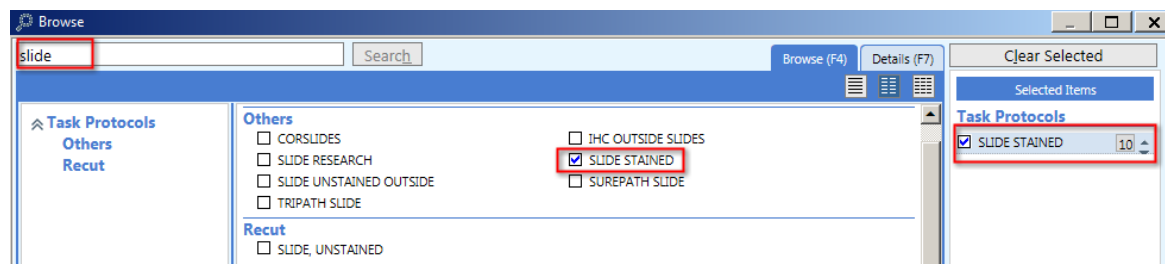

3. Leave the **Source** field blank.

4. Type in a **Description**. Enter the source information here.

5. Complete the collection information in the fields to the right. Enter the **Collection Date** and **Collection Time**. The Collection Time is important because if CP tests are ordered on a case, then CP Beaker requires a Collection Time to be filled out. If you don't know the time, put "n" for current time.

6. **Multiple Specimens:** If you need to add another specimen to the case, click in the **Add Specimen** field again and choose the appropriate protocol. It will add another row to the specimen list.

7. When you add consult specimens, a placeholder block appears. Generally for consults you usually only receive slides, Beaker needs a placeholder block to connect the slides to the specimen.

Adding Tasks:

8. Click on the first specimen (if you have multiple specimens) and click in the **Add Tasks** field.

Modified on 8/13/19

a. If you received stained slides: Type "**slide**" and press Enter. The Browse window appears, and choose "**SLIDE STAINED OUTSIDE**". To the right, it will list the protocols you chose. Use the up and down arrows to specify how many slides you received. Click the **Accept** button.

b. If you received blocks: Type "**block**" and press Enter. The Browse window appears, and choose "**BLOCKS OUTSIDE**". To the right, it will list the protocols you chose. Use the up and down arrows to specify how many blocks you received. Click the **Accept** button.

c. If you received unstained slides: Type "slide" and press Enter. The Browse window appears, and choose "**SLIDE UNSTAINED OUTSIDE**". To the right, it will list the protocols you chose. Use the up and down arrows to specify how many slides you received. Click the **Accept** button.

9. **Please check to make sure those tasks are correct!** If you have multiple specimens, click on each specimen's protocol name and the tasks associated with that specific specimen will show in the table below.

> ### Deleting Items:
> If the case hasn't yet been accepted, deleting an item completely removes it from the case. If the case has already been accepted, the deleted item appears with a line through it to indicate that it doesn't need to be processed or performed and that charges won't be filed for it.
>
> To see deleted tasks, click ▬ **Show Deleted** under the ⊙ Actions button drop down list. If you deleted an item in error, select it and click ◄◄ **Restore.**

Adding Task Notes:

10. If you need to add a flag or note to a particular task, such as "**A3**", you can click in the **Task Flag** or **Task Note** field for the task you would like to leave a flag or comment. Clicking on the **Task Note** field will bring up the Flags and Notes window.
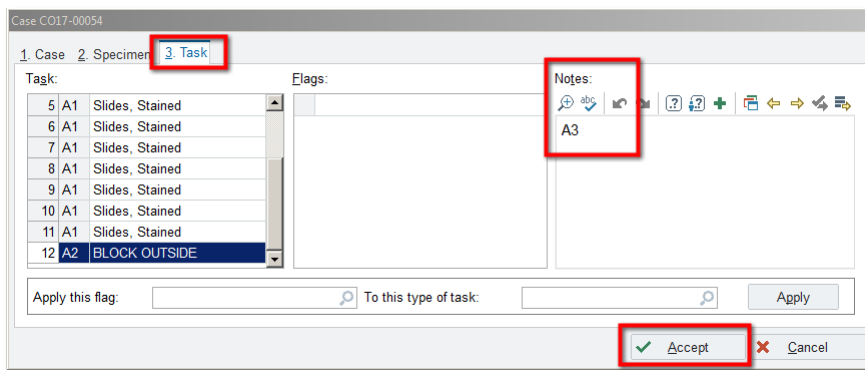
11. Make sure the block or slide you want to leave a note for is selected. Type the comment/note in the Notes field. Click the **Accept** button.

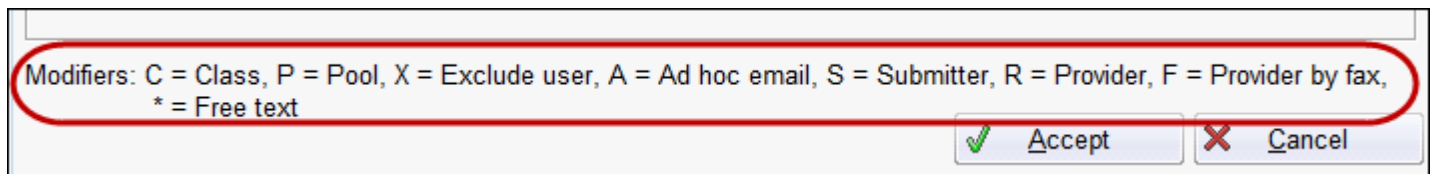| ID	C	Task (Alt+2)	Slides	Code	Qty	Task Flags	Task Note
A1.8	✓	Slides, Stained	1				
A1.9	✓	Slides, Stained	1				
A1.10	✓	Slides, Stained	1				
A2	✓	BLOCK OUTSIDE					A3

Copy a provider on the patient's results:

Use the CC List window to specify result recipients for all of the orders associated with a specimen. You can specify individuals, or use the modifiers at the bottom of the window to include specific types of recipients, such as pools, classes, or submitters.
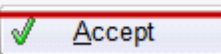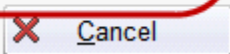
> ⓘ Pools and classes are used to send messages to groups of people. A class message is just an individual message that is sent to the group. Each class member receives their own copy. A pool message is a single message that is shared by everyone in the group. Essentially, it is a task message. When a pool member acts on the message, it is marked as Done and is removed from the pool members' In Baskets.

1. In the **Case Builder** activity, click 📄 **CC Results** from the Actions menu ⋯ .
2. Define the list of recipients.

   a. To enter a specific user in Epic's database, enter that person's name in the **CC Recipient** field.
   b. Click ✔ **Accept**. The recipients you entered receive an In Basket message with a copy of the results from that case.
3. You can also use the modifiers listed at the bottom of the window. Enter the recipient in the format <modifier><space><name>. For example, to send results to the an outside provider's fax number, type in "*** Smith, John**" and fill in the fax number on the bottom of the window.

Modifiers: C = Class, P = Pool, X = Exclude user, A = Ad hoc email, S = Submitter, R = Provider, F = Provider by fax,
* = Free text

✔ Accept   ✖ Cancel

Accessioning the Case:

1. When you are done, click ✔ **Accept** to accession the case. Specimen labels should print at this time, attach to paperwork.

2. **NOTE! If you entered Case Builder from Requisition Entry, you still need to accept the requisition after you accession the case in Case Builder!** At the **Requisition Entry** screen, if you have additional requisitions to enter, click ✔ **Accept & New** to move to the next requisition. Otherwise, click the arrow next to ✔ **Accept & New** and select ✔ **Accept** to save your work and close Requisition Entry.

Adding information in Case Results:

Entering Materials Received into a Case:

1. The first step after accessioning the case is entering information about the materials received for the case. There are several ways to open a case in **Case Results**.

   a. The most efficient way to enter **Case Results** is to scan the specimen's barcode while you are viewing the **Outstanding List**.

   b. If you have the Case ID# and do not have a barcode, you can click on the **Case Results** link on your dashboard and type Case ID# in first field.

      i. Alternately, you can search by Patient name in this window by clicking the **Expand** button. Search for the patient's name (Format: Lastname, Firstname).
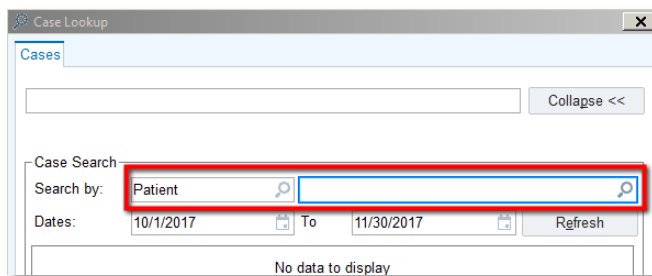
2. When **Case Results** opens, click on the **Results** button in the middle of the screen.
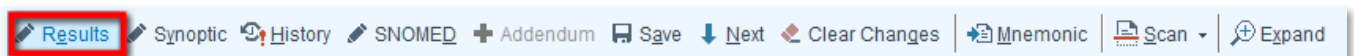

3. On the left side of the screen, make sure **1. Materials Received** is selected. Click your cursor in the text area to the right of the component list. Type "**lab ap mat**" in the Insert SmartText field and press Enter.
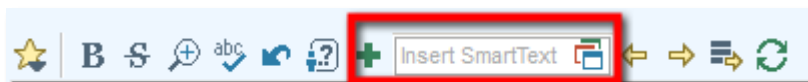
4. This will bring up several choices; pick the appropriate choice depending on how many specimens you have. If you use this smartText a lot, you can click the **Add Favorite** button and it will show up in a list on the **Favorites tab** at the top. If you want to see what a particular template looks like, you can click on **Show Preview** button and it will display the text. Click the **Accept** button when done.
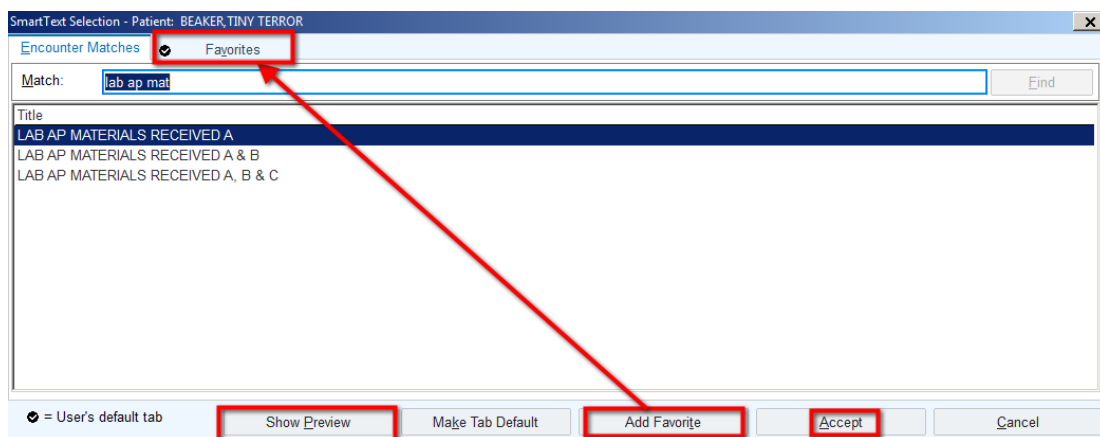
5. If you selected the **LAB AP MATERIALS RECEIVED A** template, the following template will show. To edit this template, you can click on **F2** key on your keyboard to jump directly to the *** areas where you need to type text. You can also press **F3** to make the window bigger.
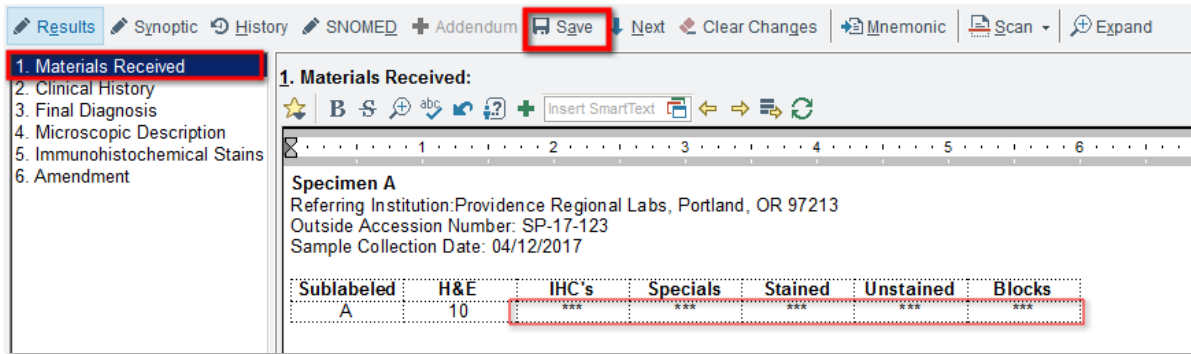
6. Delete the columns that you do not use. To delete a column, select the column and then right click on your selection and choose **Delete column**.

Entering Text in the Final Diagnosis:

7. To entering information about the specimen in the 3. **Final Diagnosis** component, select that component. Manually type specimen information in the text box.
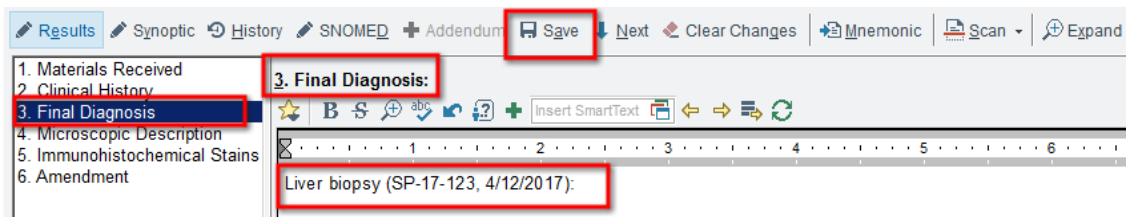
8. When you are done adding information into the case, click on the **Save** button.

Scanning Order Paperwork into Case Results:

1. To scan in any documentation into the case, click on the **Scan** icon on the middle toolbar of **Case Results**, and choose "**Scan Image**". Make sure you are on a workstation with a scanner attached to it.
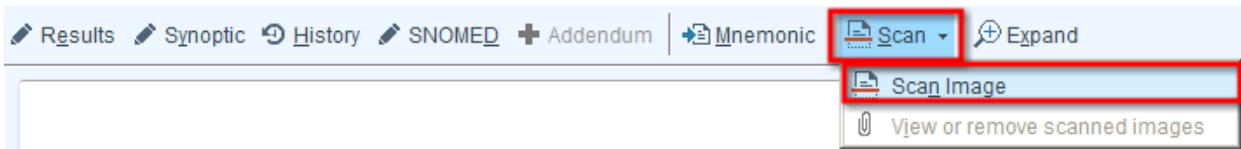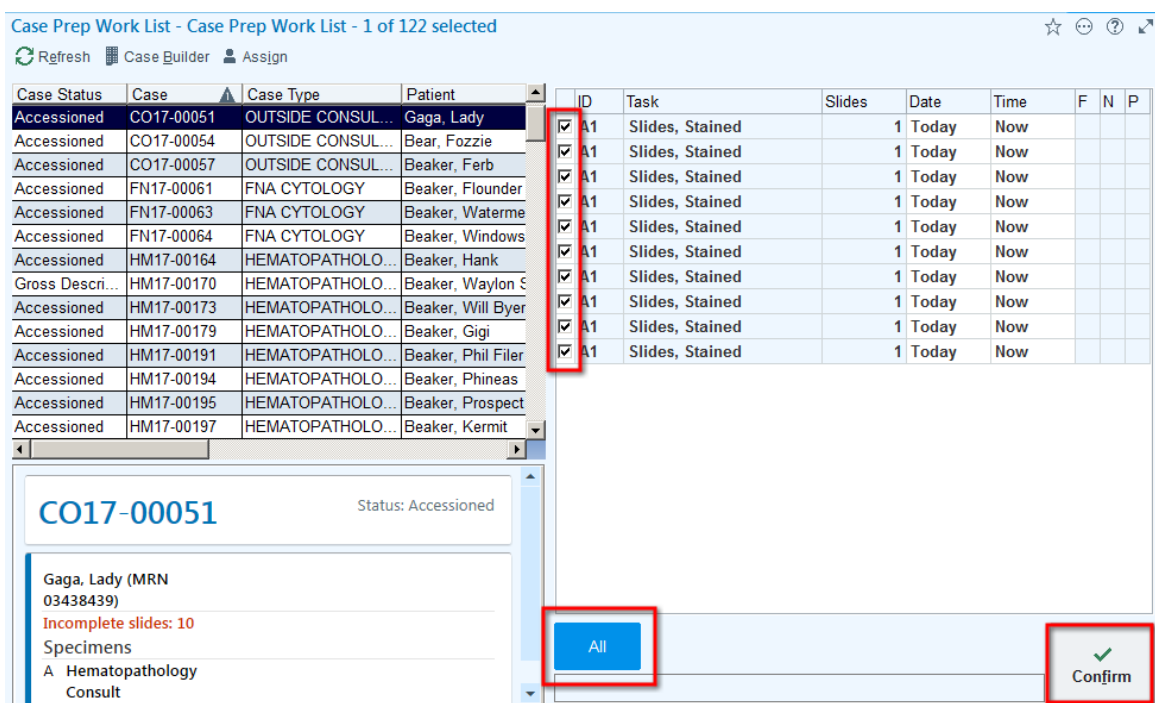

2. Type in "**Outside Report**" in the Description field. Click on the "**Acquire**" button. After the document has been scanned in, you should see the scan in the scan window. Click the **Save Doc** button when you are ready to accept the scan.

Result Scan

Acquire | Import | Save doc | Copy | Paste | Clear all | Clear page | Select Scanner

No image loaded

Document Data

Description: Outside Report

Doc type: Lab Managed Result Scan

Page Information

No page is loaded.

First | Prev | Next | Last

Magnification and Rotation

+ Enlarge | - Reduce

Actual size | Size to fit

<< Rotate | Flip | Rotate >>

Scanner Options

☐ Use ADF   ☐ Use duplex

☐ Show scanner's user interface

☑ Save all pages at actual size

Show Additional Data Fields

Confirm and Print Slide Labels in Case Prep Work List:

1. Click the 📋 tab to open the **Case Prep Work List**. You can also find a link to it from your Beaker AP Lab Dashboard.

2. Make sure you are viewing the **Case Prep Work List** view. To change your view, click on the ⊙ **Actions** button and choose ✿ **Views** and pick the view you want. You can use the column headers for "Case" to sort and filter the list. The consult cases all have case numbers that start with "CO".

3. Select the case you want to confirm on the left side of the window. You can hold down the CTRL key to select multiple cases. The tasks for all the selected cases appear on the right.

4. Click the **All** button to confirm all of the tasks for the selected cases.

5. Click ✔ **Confirm**. The slide labels should print and the selected cases will drop off the work list.

6. At this point, you would label the slides and place in cardboard slide trays for the fellows to pick up daily.