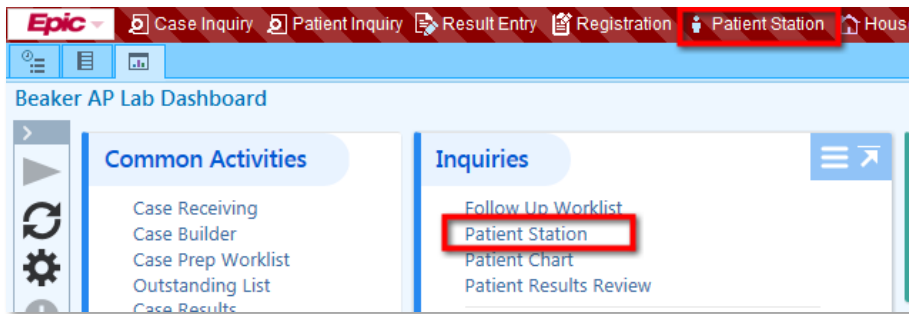


Consultations: Beaker AP Guide:

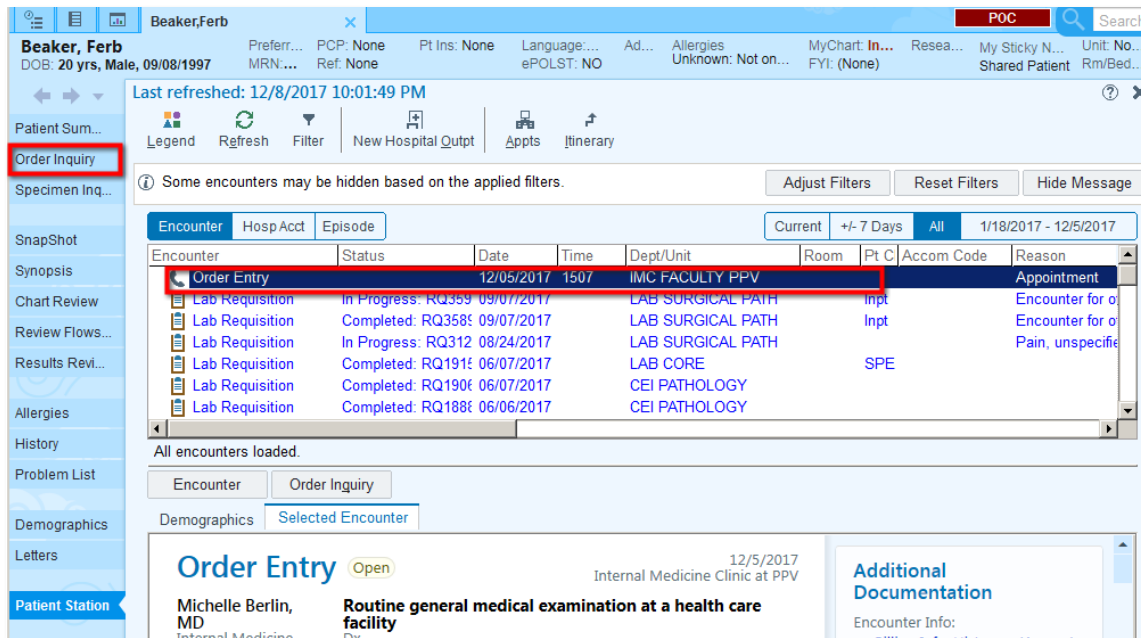
Accessioning and Building a Case

Creating a case for a clinic consult:

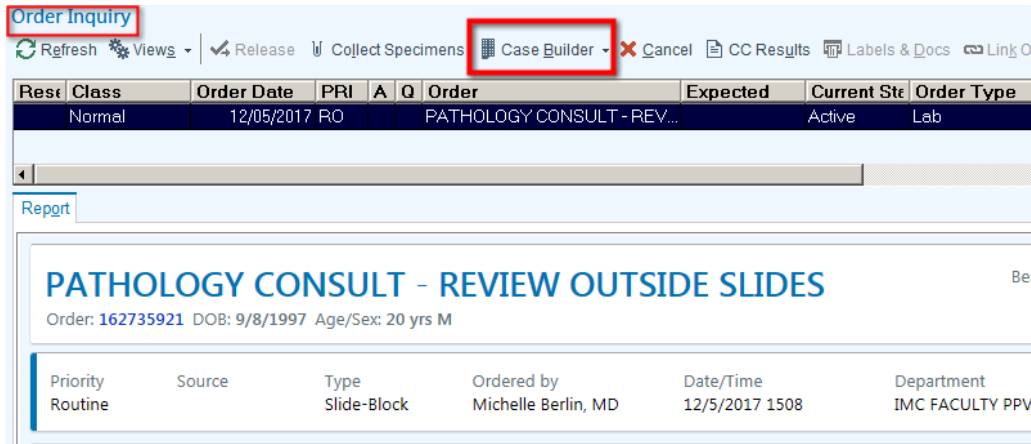
1. Usually orders will print out from different clinics. When the slides are delivered, the paperwork is matched with the slides.
2. In Beaker, go to the **Patient Station** activity. There is a link to **Patient Station** on your Beaker AP Lab Dashboard or you can use the **Patient Station** button 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**”.



The screenshot shows the 'Order Inquiry' window. At the top, there is a navigation bar with buttons for 'Refresh', 'Views', 'Release', 'Collect Specimens', 'Case Builder', 'Cancel', 'CC Results', 'Labels & Docs', and 'Link'. The 'Case Builder' button is highlighted with a red box. Below the navigation bar is a table with columns: 'Rest', 'Class', 'Order Date', 'PRI', 'A', 'Q', 'Order', 'Expected', 'Current Stc', and 'Order Type'. The first row of data shows 'Normal', '12/05/2017', 'RO', 'PATHOLOGY CONSULT - REV...', 'Active', and 'Lab'. Below the table is a 'Report' section with the title 'PATHOLOGY CONSULT - REVIEW OUTSIDE SLIDES' and patient information: 'Order: 162735921 DOB: 9/8/1997 Age/Sex: 20 yrs M'. At the bottom, there is a table with columns: 'Priority', 'Source', 'Type', 'Ordered by', 'Date/Time', and 'Department'. The data row shows: 'Routine', 'Slide-Block', 'Michelle Berlin, MD', '12/5/2017 1508', and 'IMC FACULTY PPV'.

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.

The screenshot shows the 'Requisition Entry' form with the following fields and values highlighted by numbered callouts:

- 1. Submitter: OHSU PATIENT
- 2. Requisition number: RQ5279
- 3. Patient: ALOHA, MASON D
- 4. DOB: 8/11/1944
- 5. Authorizing provider: PALMROSE, THOMAS W
- 6. Bill to: Patient Bill
- 7. Procedure: PATHOLOGY CONSULT -
- 8. # of Spec.: 1
- 9. Case Builder button

Other visible fields include: Patient alias, Address (15226 CHESTNUT STREET), State (OR), ZIP (97027), SSN, Sex (M), County (CLACKAMAS), TOB, City (GLADSTONE), Country (United States of America), Ref Lab No (SO-17-45), Diagnoses (1 C61 Malignant neoplasm of prostate [ICD-10-CM]), Ordering provider, and a table for Specimen/Case details.

Procedure [6]	Specimen/Case	# of Spec.	Status	Specimen Type	Priority	Specimen Source	Dx	Q	C	H	L
1 PATHOLOGY CONSULT -		1		Slide-Block	Routine		1				
2											

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.)”.

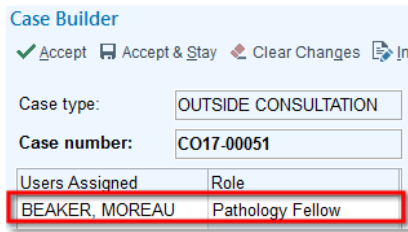
The screenshot shows the 'Order Search' results for the search term 'PCON'. The results are as follows:

Code	Name	Type
LAB01209	PCON (aka PATHOLOGY CONSULT - REVIEW OUTSIDE SLIDES)	Lab
LAB101166	PCONMO (aka PATHOLOGY CONSULT WITH MOLECULAR ONCOLOGY - REVIEW OUTSIDE SLIDES)	Lab

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:

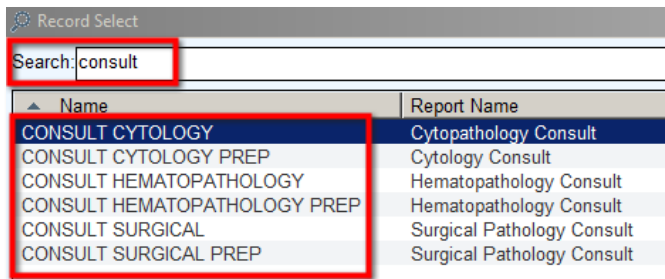
1. At the **User Assigned** and **Role** field, assign the appropriate fellow who will be reviewing the case.



The screenshot shows the 'Case Builder' interface. At the top, there are buttons for 'Accept', 'Accept & Stay', 'Clear Changes', and 'In'. Below these are fields for 'Case type:' (OUTSIDE CONSULTATION) and 'Case number:' (CO17-00051). At the bottom, there is a table with two columns: 'Users Assigned' and 'Role'. The first row in the table has 'BEAKER, MOREAU' in the 'Users Assigned' column and 'Pathology Fellow' in the 'Role' column. Both cells in this row are highlighted with a red border.

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.



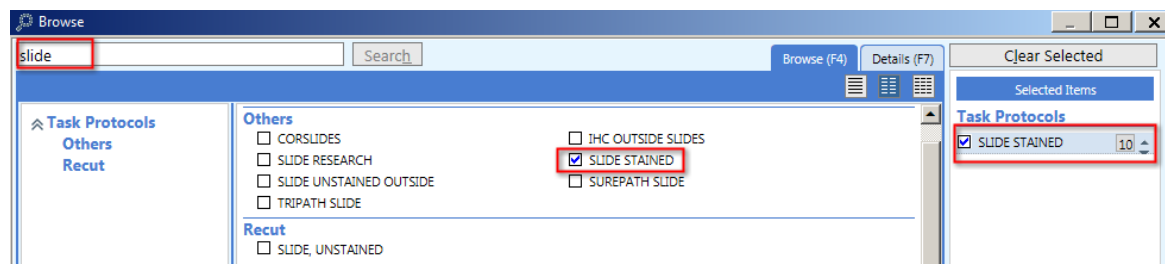
The screenshot shows a 'Record Select' dialog box. At the top, there is a search field containing the text 'consult'. Below the search field is a table with two columns: 'Name' and 'Report Name'. The table contains six rows of results, all of which are highlighted with a red border. The results are:

Name	Report Name
CONSULT CYTOLOGY	Cytopathology Consult
CONSULT CYTOLOGY PREP	Cytology Consult
CONSULT HEMATOPATHOLOGY	Hematopathology Consult
CONSULT HEMATOPATHOLOGY PREP	Hematopathology Consult
CONSULT SURGICAL	Surgical Pathology Consult
CONSULT SURGICAL PREP	Surgical Pathology Consult

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.




The screenshot shows a 'Browse' dialog box. At the top, there is a search field containing the text 'slide'. Below the search field are buttons for 'Browse (F4)' and 'Details (F7)'. On the right side, there is a 'Clear Selected' button and a 'Selected Items' section. The 'Selected Items' section contains a table with two columns: 'Task Protocols' and a numerical value. The first row in the table has 'SLIDE STAINED' in the 'Task Protocols' column and '10' in the numerical column. Both cells in this row are highlighted with a red border.

- 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.

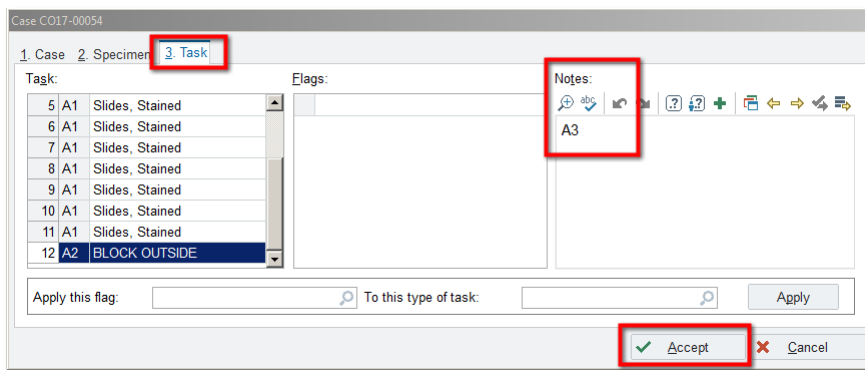
Deleting Items:

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

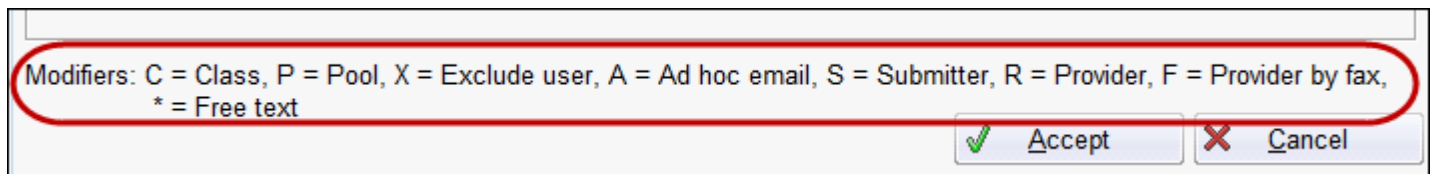
Copy a provider on the patient's results:

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.

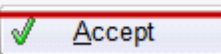
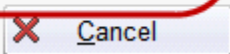


Pools and classes are used to send messages to groups of people. A class message is just an individual message that is sent to the group. Each class member receives their own copy. A pool message is a single message that is shared by everyone in the group. Essentially, it is a task message. When a pool 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

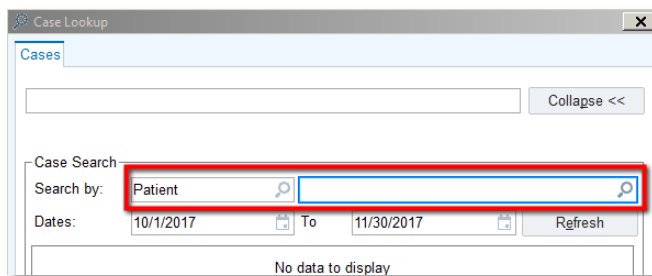
Accessioning the Case:

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.

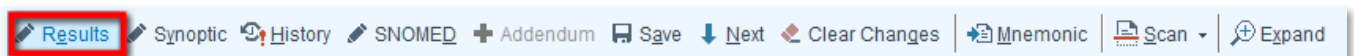
Adding information in Case Results:

Entering Materials Received into a Case:

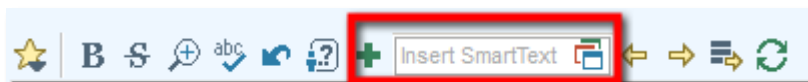
1. The first step after accessioning the case is entering information about the materials received for the case. There are several ways to open a case in **Case Results**.
 - a. The most efficient way to enter **Case Results** is to scan the specimen's barcode while you are viewing the **Outstanding 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).



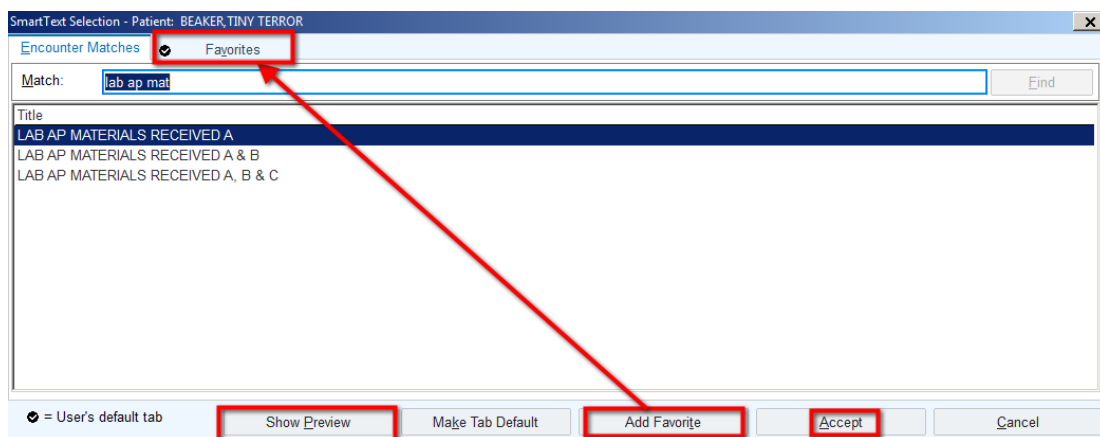
2. When **Case Results** opens, click on the **Results** button in the middle of the screen.



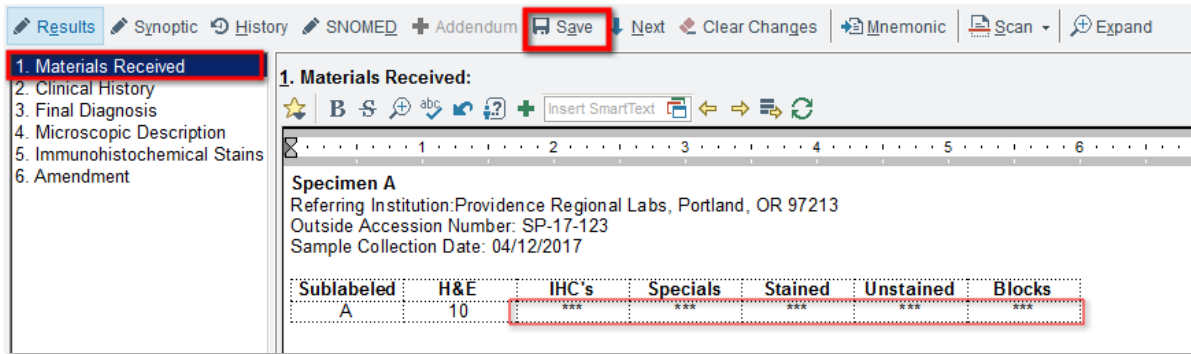
3. On the left side of the screen, make sure **1. Materials Received** is selected. Click your cursor in the text area to the right of the component list. Type "**lab ap mat**" in the Insert SmartText field and press Enter.



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.



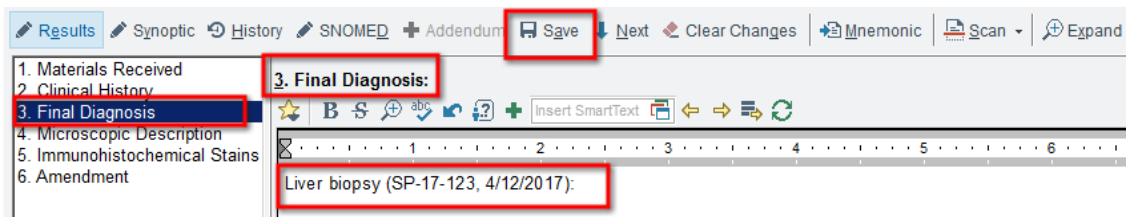
- If you selected the **LAB AP MATERIALS RECEIVED A** template, the following template will show. To edit this template, you can click on **F2** key on your keyboard to jump directly to the ******* areas where you need to type text. You can also press **F3** to make the window bigger.



- 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:

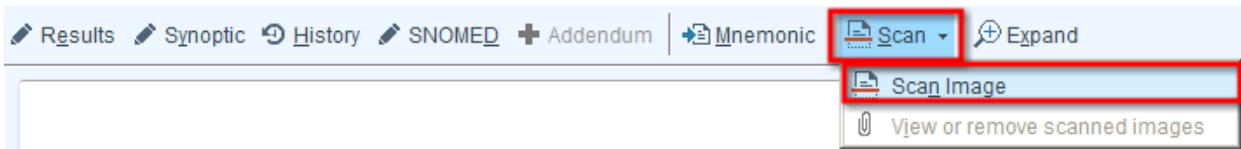
- To entering information about the specimen in the 3. **Final Diagnosis** component, select that component. Manually type specimen information in the text box.



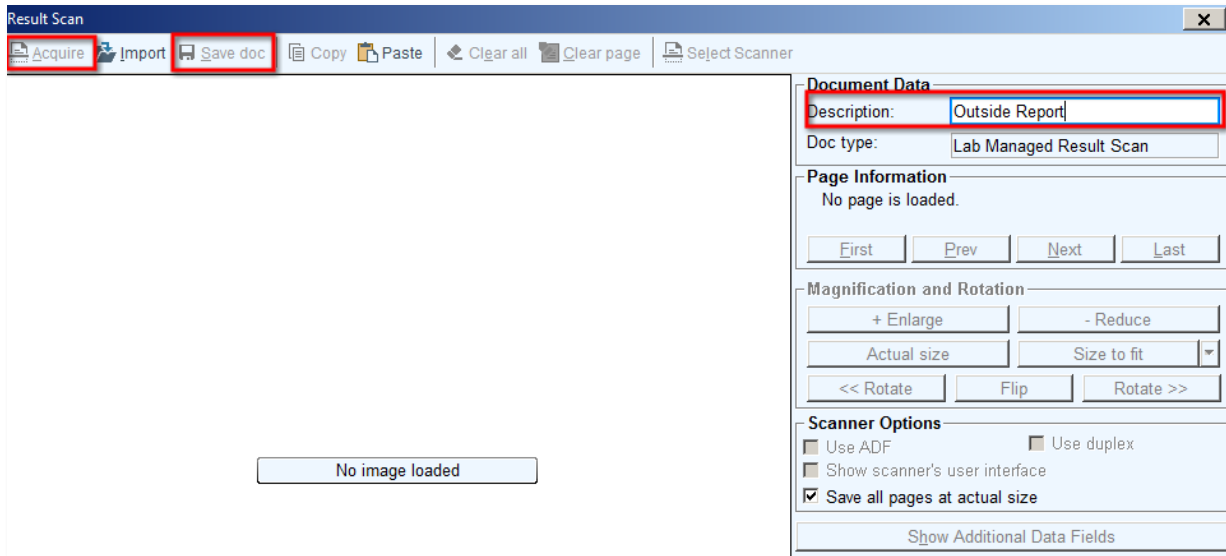
- When you are done adding information into the case, click on the **Save** button.

Scanning Order Paperwork into Case Results:





- 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.

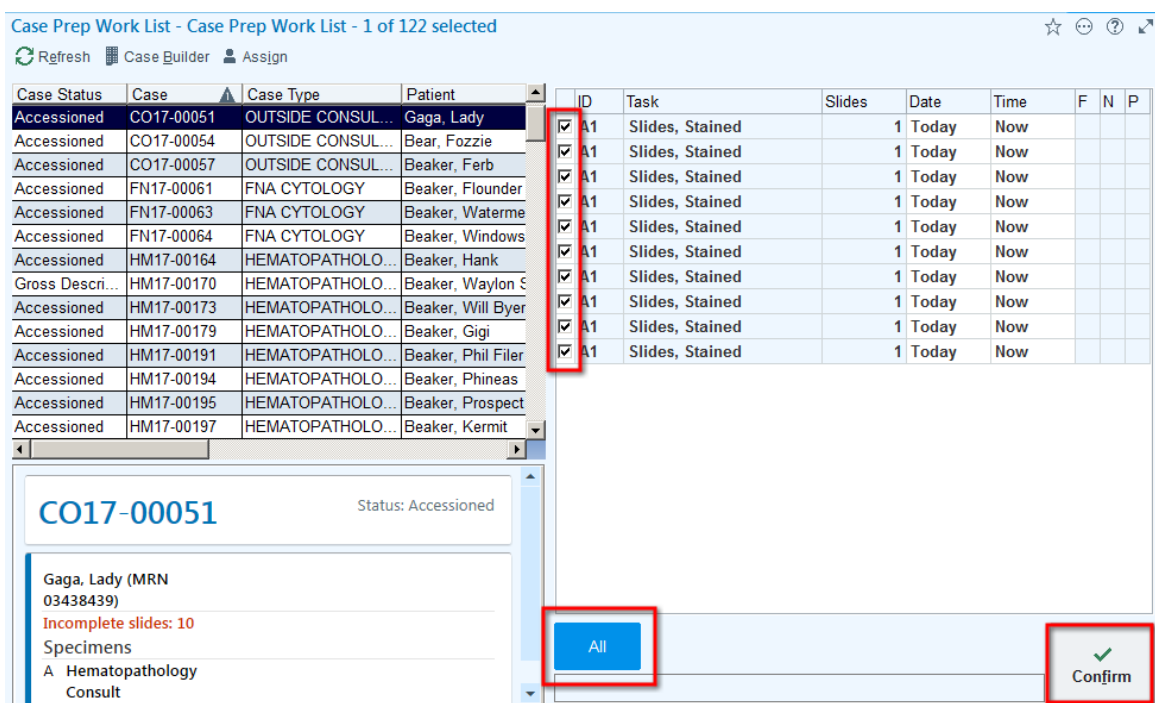


- Type in **Outside Report** in the Description field. Click on the **Acquire** button. After the document has been scanned in, you should see the scan in the scan window. Click the **Save Doc** button when you are ready to accept the scan.



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.



The screenshot shows the 'Case Prep Work List' interface. At the top, it says 'Case Prep Work List - Case Prep Work List - 1 of 122 selected'. Below this is a table with columns: Case Status, Case, Case Type, Patient, ID, Task, Slides, Date, Time, F, N, P. The table lists several cases, with the first one selected. A red box highlights the 'All' button at the bottom left and the 'Confirm' button at the bottom right. A detailed view of the selected case (CO17-00051) is shown on the left, including patient information and specimen details.

Case Status	Case	Case Type	Patient	ID	Task	Slides	Date	Time	F	N	P
Accessioned	CO17-00051	OUTSIDE CONSUL...	Gaga, Lady	<input checked="" type="checkbox"/>	A1 Slides, Stained	1	Today	Now			
Accessioned	CO17-00054	OUTSIDE CONSUL...	Bear, Fozzie	<input checked="" type="checkbox"/>	A1 Slides, Stained	1	Today	Now			
Accessioned	CO17-00057	OUTSIDE CONSUL...	Beaker, Ferb	<input checked="" type="checkbox"/>	A1 Slides, Stained	1	Today	Now			
Accessioned	FN17-00061	FNA CYTOLOGY	Beaker, Flounder	<input checked="" type="checkbox"/>	A1 Slides, Stained	1	Today	Now			
Accessioned	FN17-00063	FNA CYTOLOGY	Beaker, Waterme	<input checked="" type="checkbox"/>	A1 Slides, Stained	1	Today	Now			
Accessioned	FN17-00064	FNA CYTOLOGY	Beaker, Windows	<input checked="" type="checkbox"/>	A1 Slides, Stained	1	Today	Now			
Accessioned	HM17-00164	HEMATOPATHOLO...	Beaker, Hank	<input checked="" type="checkbox"/>	A1 Slides, Stained	1	Today	Now			
Gross Descri...	HM17-00170	HEMATOPATHOLO...	Beaker, Waylon S	<input checked="" type="checkbox"/>	A1 Slides, Stained	1	Today	Now			
Accessioned	HM17-00173	HEMATOPATHOLO...	Beaker, Will Byer	<input checked="" type="checkbox"/>	A1 Slides, Stained	1	Today	Now			
Accessioned	HM17-00179	HEMATOPATHOLO...	Beaker, Gigi	<input checked="" type="checkbox"/>	A1 Slides, Stained	1	Today	Now			
Accessioned	HM17-00191	HEMATOPATHOLO...	Beaker, Phil Filer	<input checked="" type="checkbox"/>	A1 Slides, Stained	1	Today	Now			
Accessioned	HM17-00194	HEMATOPATHOLO...	Beaker, Phineas	<input checked="" type="checkbox"/>	A1 Slides, Stained	1	Today	Now			
Accessioned	HM17-00195	HEMATOPATHOLO...	Beaker, Prospect	<input checked="" type="checkbox"/>	A1 Slides, Stained	1	Today	Now			
Accessioned	HM17-00197	HEMATOPATHOLO...	Beaker, Kermit	<input checked="" type="checkbox"/>	A1 Slides, Stained	1	Today	Now			

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

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