Pathologist/Resident: Heme Path Guide:

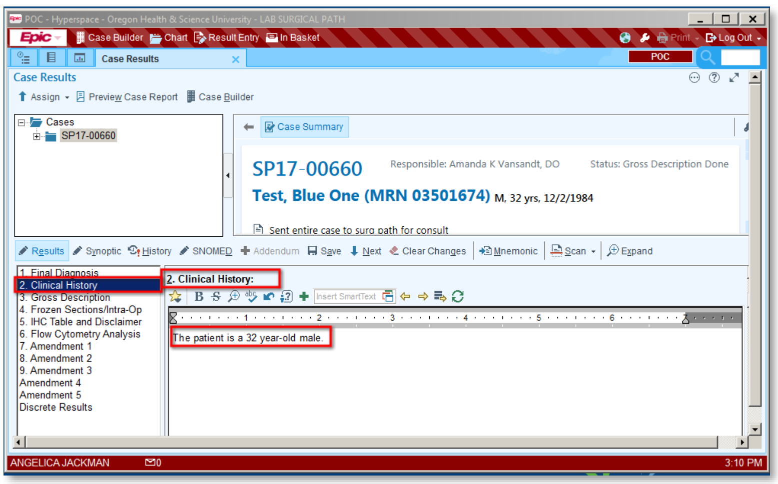
Triage Slides:

After the techs prepare the spun slides and put them with a label in the “Cases for Triage” bin, residents/fellows will examine the slides and determine what flow tests need to be ordered.

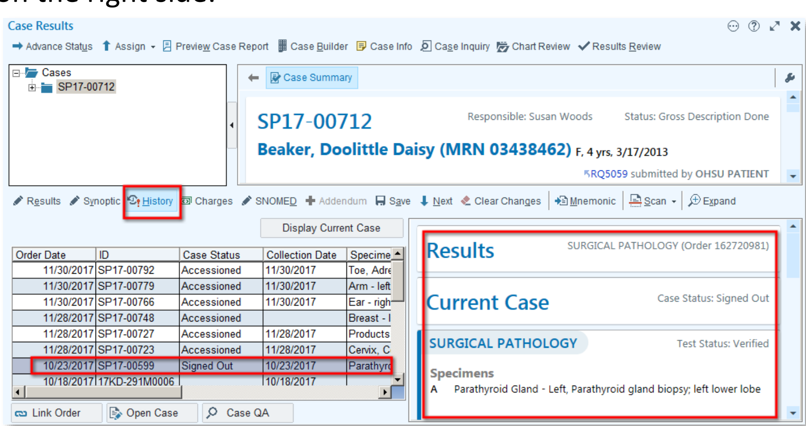
Reviewing Clinical History:

1. The first step for working on a case in Beaker is to examine any clinical history that might be pertinent to the case. There are 4 areas you can find information about your patient.

    a. **Clinical History component in Case Results** - While in **Case Results**, click on the **Clinical History** component on the left side of the screen. You will see any clinical history comments that either the OR, accessioner or grosser added to this particular case directly.



    b. **History Button in Case** Results – By clicking the History button, you will get a list of past AP cases for this patient. By selecting a case on the list to the left, the case information will display on the right side.



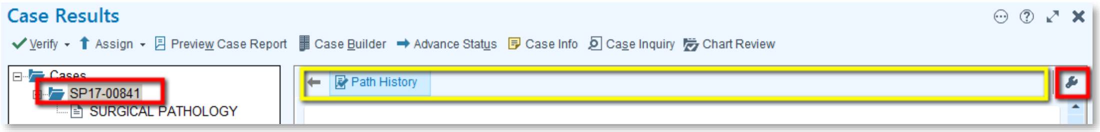
    c. **Case Summary** and **Current Case Info** button in **Case Results -** You can add buttons to your Case Results button bar:

    * **Path History (default)** – displays information about past results.

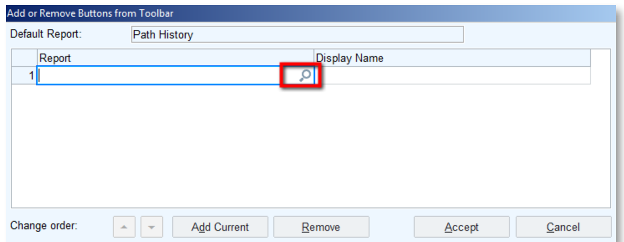
    * **Current Case Info** - displays a cleaner summary of the case results. It is similar to using the ‘Preview Case Report’ button without the extra print letterhead sections.

    * **Case Summary** - show the collection questions, list of specimens, and tasks.

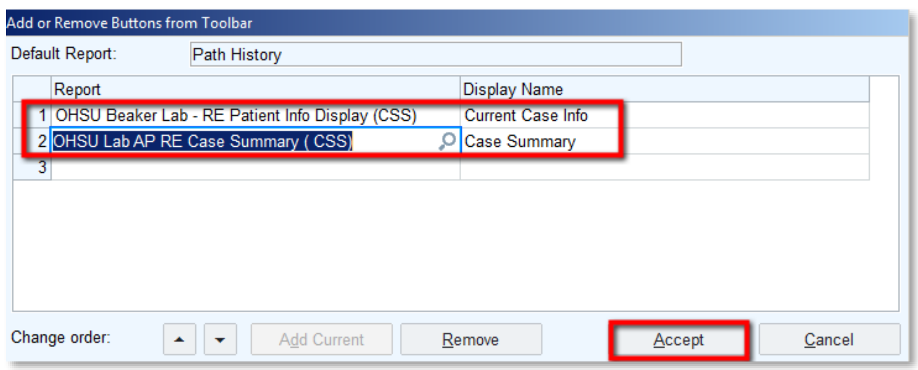
i. Make sure you have the **Case ID** selected on the left side of **Case Results**. Notice that the default button on this bar is **Path History**. Click on the **wrench** icon on that toolbar.



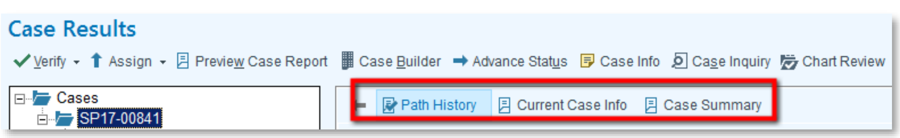
ii. The following window will appear. Click on the magnifying glass icon to bring up other choices.



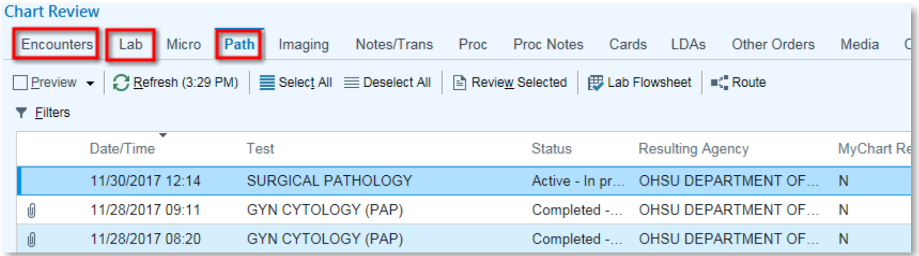
iii. Select **OHSU Beaker Lab – RE Patient Info Display (CSS)** and click the **Accept** button. Click the 2nd row and click on the 2nd row's magnifying glass icon. Select **OHSU Lab AP RE Case Summary(CSS).** Click the **Accept** button. You should have 2 rows filled out as below. Click on the **Accept** button.



iv. The toolbar should look like this:



d. **Patient Chart** – Click the **Patient Chart** link (under the Inquiries column) on your Beaker AP Lab Dashboard. Type in the MRN for the patient in question and click the **Accept** button. The **Encounters tab** will detail any events and notes that the patient has had. The **Lab tab** will list any CP tests that have been run on this patient. The **Path tab** lists the AP cases that this patient has as well as the status of those cases (same as the **History** button in **Case Results**).

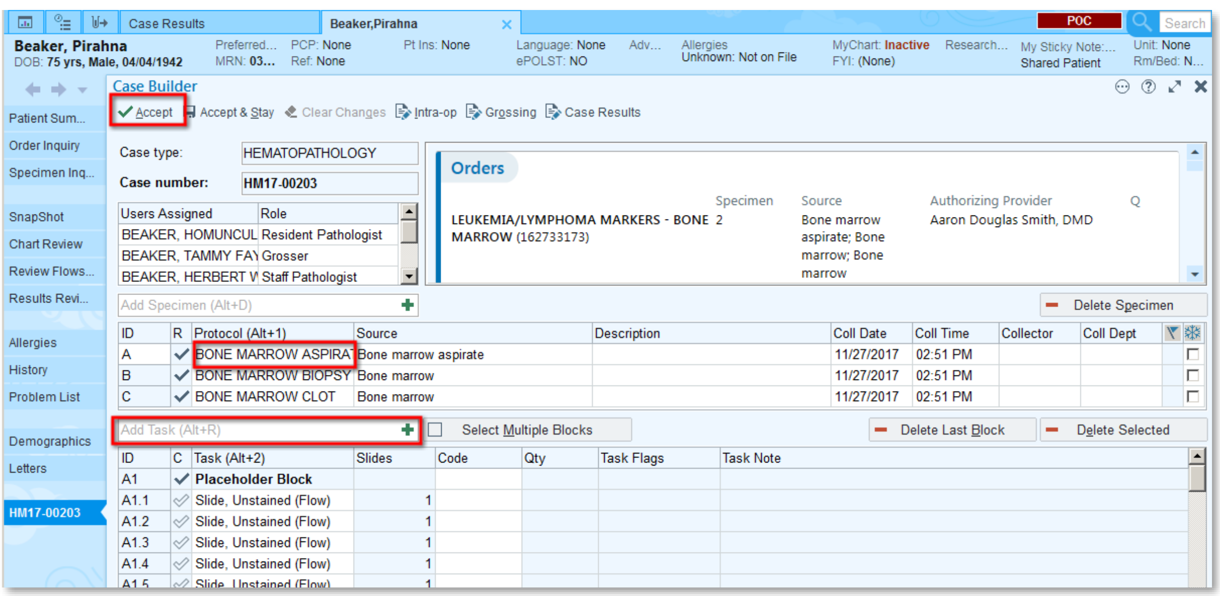


Request additional stains or tasks in Case Builder

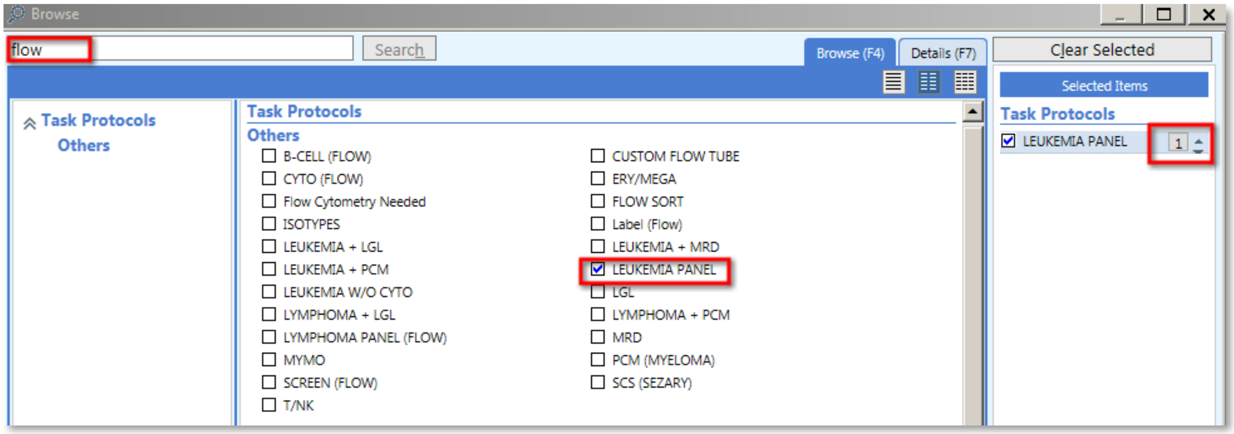
1. After reviewing the case, you use the **Case Builder** activity to order additional stains and tasks for a specimen.
   a. To quickly access **Case Builder** from **Case Results** you can click the **Actions** button in the upper-right corner and select **Case Builder**.
   b. Alternatively, you can click on the **Case Builder** link on your Beaker AP Lab Dashboard and scan in the barcode or manually enter the case number.

Adding Tasks:

2. Select the specimen that needs stains or tasks.



3. In the **Add Task** field, search for the task protocol you want to add. To add flow tests, you can also type "**flow**" in the **Add Task** field. This will bring up a Task Protocol Browser window and you can check off the tasks you want to add. You can specify the quantity for a certain task by using the arrows next to the Task Protocols on the right.



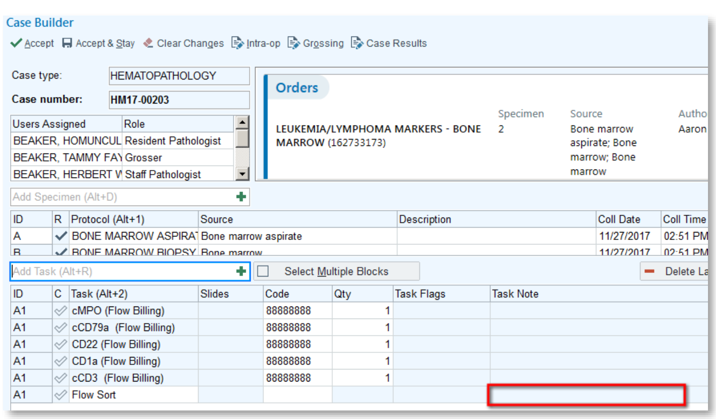
a. If you would like to request Flow Cytometry on your specimen, type in “flow” in the Add Task field. Check off the the task “**Flow Cytometry Needed**”. This will add the task “Flow Cytometry Requested” in the task list. This task requires a task note to let Flow know what you would like them to perform. See next section about adding Task notes.

b. If you would like to order a flow sort on the case, type in “flow” in the Add Tast field. Check off the task “**FLOW SORT**”. This will add the task “Flow Sort” in the task list. This task requires a task note to let Flow know what you would like them to perform. See next section about adding Task notes.

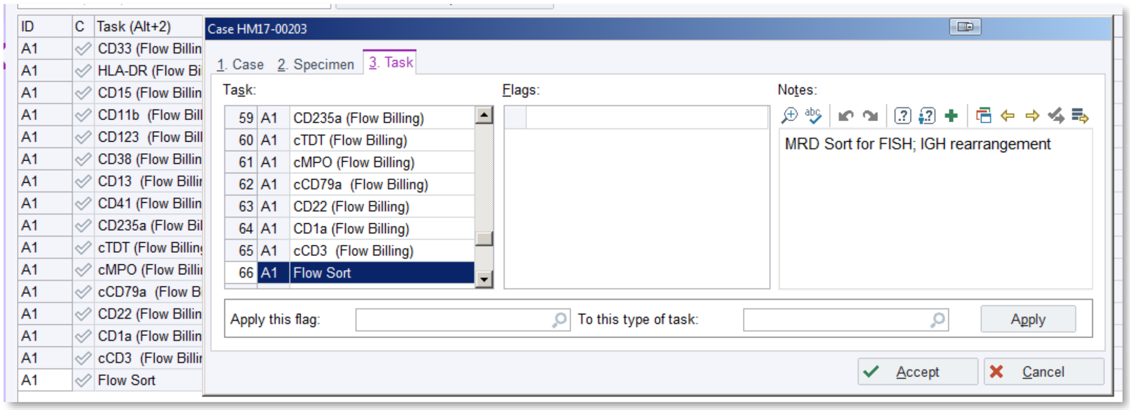
Adding Task Notes:

When adding certain tasks to Case Builder, you need to add a Task note to give the techs more information about what to do with that task. An example is when you add the task “**Flow Sort**” the flow techs need to know what kind of sort to perform. Another example is when you order the task “**Flow Cytometry Needed**” and you want put a **task note** of “Rule out Lymphoma” or “Clinical suspicion”.

4. To add a task note in **Case Builder**, click on the **Task Note** field on the row that you want to add a note.



5. Type a note in the **Notes** text area. Click the **Accept** button.



6. When you are done, click **Accept** to save the case. This will add these tests and stains to the appropriate Case Prep Work List for the flow techs to create the slides and stains.

Assign responsibility for a case:

Residents/Fellows should make sure they (and the appropriate pathologist) has been assigned to the case. You can assign or take responsibility for a case in several ways:

- Case Builder: In the **Users Assigned** field, enter the name of the person who should be assigned responsibility.
- Case Prep Work List: Click **Assign** on the toolbar and enter the person you want to assign.
- Outstanding List: To take responsibility, select a case, click the arrow next to **Assign**, and select **Take**. To assign responsibility, click **Assign** and enter the person's name in the **User** field.
- Case Results: To take responsibility, click the arrow next to **Assign** and select **Take**. To assign responsibility, click **Assign**, select **Assign**, and enter the person's name in the **User** field.

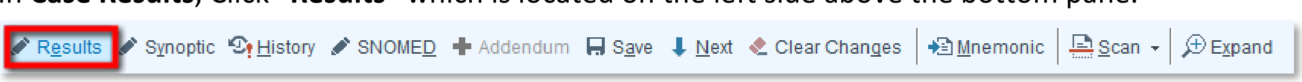
Ordering Molecular tests or FISH tests:

In order to reflex molecular and FISH tests to KDL, the test also needs to be ordered in **Case Results** in the **Discrete Results** component. This can not be done if the case in “signed out” status. So there are a couple options for pathologists to allow for these KDL tests to be created.

1. **Hold case open until IHC results are received**: Do not sign out the case until the molecular/FISH tests have been created by histotechs/IHC techs.
2. **Pathologist orders the molecular/DNA/FISH tests in Case Results themselves**, then signs out the case.
3. **Pathologist signs out the case and puts it in Amendment status** so that the histotech/IHC techs can go into the Discrete Results components and order the tests.

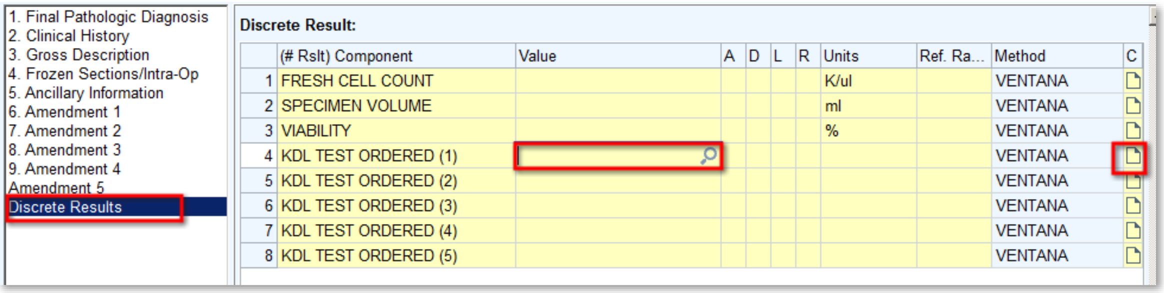
If you would like to order the molecular/DNA/FISH tests in Case Results yourself:

1. In **Case Results**, Click “**Results**” which is located on the left side above the bottom pane.



2. Click “**Discrete Results**”.

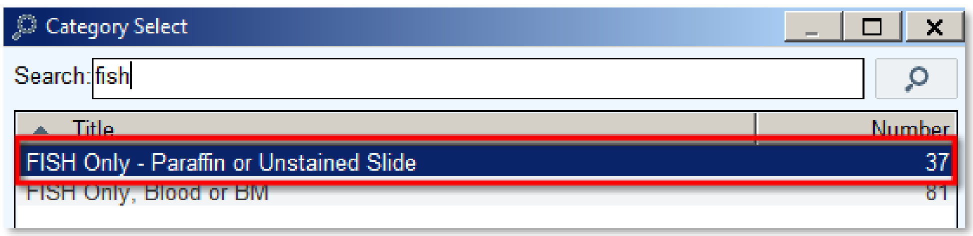
3. Click in the **Value** field for one of the KDL Test Ordered.



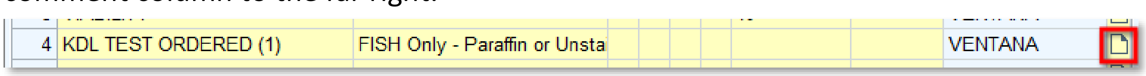
4. Click the Magnifying Glass to the right side of the field.

   a. All molecular tests will be listed. Select the test that corresponds to the task. **Make sure you are ordering the correct test for the specimen type. Tests for blood or BM will NOT reflex for tissue samples.** Click “Accept”.

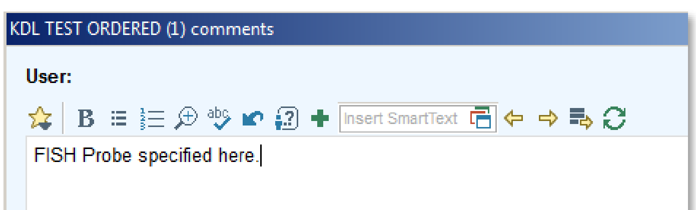
   b. For FISH probes, select **FISH Only- Paraffin or Unstained Slides**. Click “Accept”.



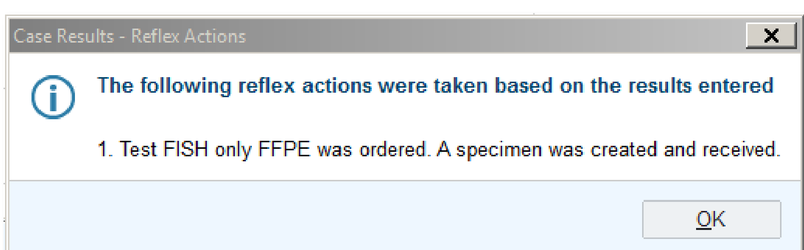
      i. After selecting the FISH Only-Paraffin or Unstained Slides and Accepting, click into the comment column to the far right.



      ii. Enter the corresponding FISH probe. Click “Accept”.



5. Click the “**Save**” button on the middle toolbar. If the reflex occurs, the following screen will appear. If the specimen was not **created and received** or you do not see this message then accession discrepancies need to be resolved.



6. Click “OK”. A new KDL CP test specimen ID # will be generated and the histotechs/IHC techs will be able to process and send that test to KDL. You should also see the linked order in the right side of the bottom Case Results window.

7. At this point, if there are no other molecular or FISH tests that need to be ordered, then you can continue the process of signing out the case.

Entering Results in Case Results:

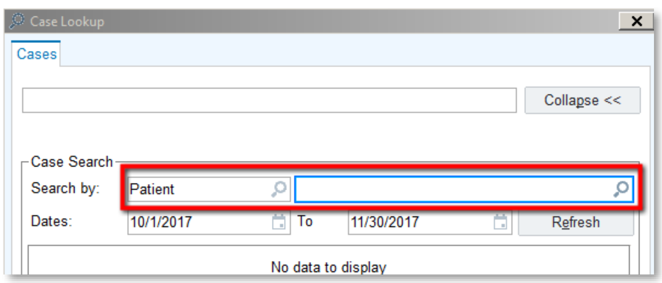
When all the requested tasks have been completed and slides have been made, the cases are divided between the bone marrow bench resident and the Heme path resident.

1. To enter the result information after reviewing the case and slides, you will need to go to the Case Results activity. There are several ways to open a case in **Case Results**.

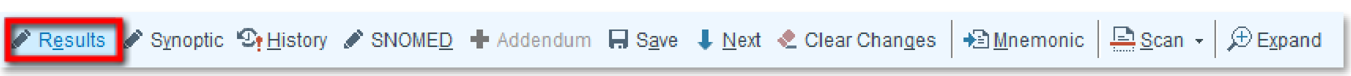
   a. The most efficient way to enter **Case Results** is to scan the specimen’s barcode while you are viewing the **Outstanding List**.

   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).

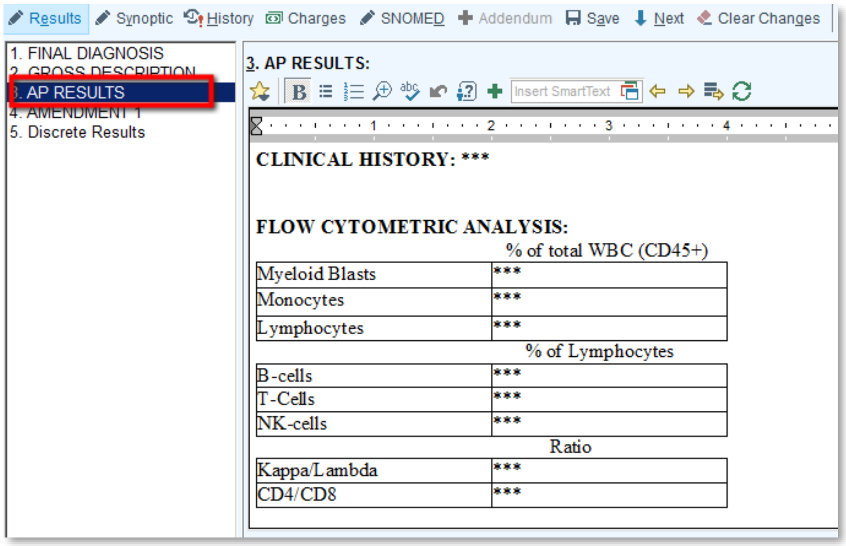


2. When **Case Results** opens, click on the **Results** button in the middle of the screen.



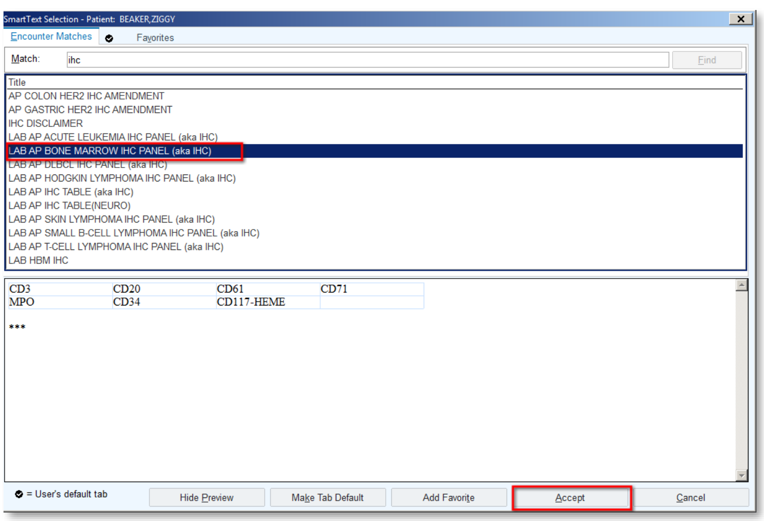
3. On the left side of the screen, is a list of components that will make up the contents of the final report. Click on the **AP RESULTS** component. Click your cursor in the text area to the right of the component list.

4. Fill out the rest of the **AP RESULTS** component by pressing **F2** to complete any wildcards (***). Make sure you either replace or delete all the wildcards (***) because it will not let you final verify the case if there are any that have not been removed.



a. You can press **F3** to make the **AP Results** component window bigger. This allows you to use the Tab key to indent your text. When you use tab key outside of the F3 window, it will just tab you to the next component in the list.

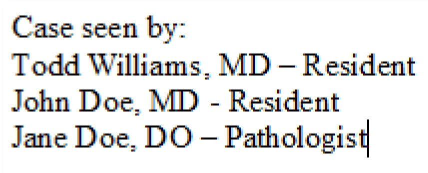
5. If you would like to add in a table that lists the antibodies in a particular IHC panel, then there are premade Smarttext tables that you can use. Put your cursor where you want to insert the table. Click in the **Insert SmartText** field and type "**IHC**". This will bring up some of the options:



a. By clicking the **Show Preview** button, you can see a example of the table it will pull in. Choose the appropriate table and click **Accept**.

6. Enter information for the GROSS DESCRIPTION(if needed) and the FINAL DIAGNOSIS.

7. At the end of the Final Diagnosis text where is says "Case Seen By", click your cursor before the first set of ***'s and press **F2** and use your **.name** Smartphrase to replace the wildcards. Use the **F2** to select the 2nd set of *** and type in the 2nd resident/fellow who worked on the case. Use **F2** to select the 3rd set of *** and type in the name of the pathologist who is working on the case.



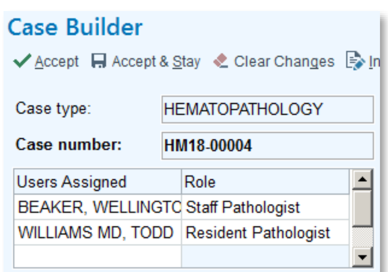
8. When you are done adding results to the Final Diagnosis, click the **Save** button on the middle toolbar.

9. If more tests need to be ordered after reviewing the previous days results, follow the "**Request additional stains or tasks in Case Builder**" section earlier in this guide.

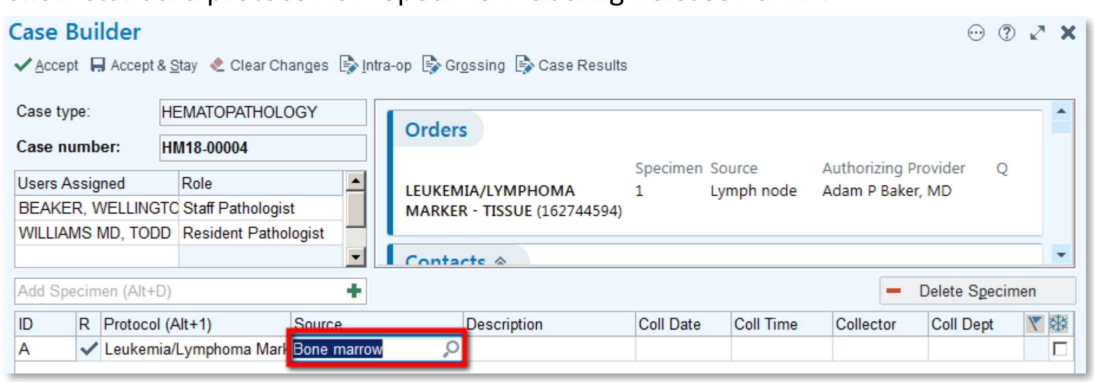
10. Double check every component in the **Case Results** activity to make sure everything looks correct. You can also click **Preview Case Report** on the activity toolbar to see a preview of what the printed report will look like.

11. The resident/fellow and the pathologist will go over the results together. All the components should be reviewed carefully to make sure that the final report is complete. Use the **Preview Case Report** on the activity toolbar to see a preview of what the printed report will look like.

12. When the resident/fellow is done with their part of reviewing the case, they should make sure that the resident/fellow and the Staff Pathologist roles are correct. Go to **Case Builder** and change the assignment if it is not correct. Assignments and the the presence of the resident/fellow name in the **Final Diagnosis** are two ways that resident/fellow involvement will be tracked.

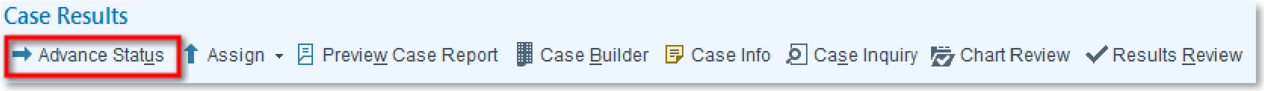


13. While in **Case Builder**, check the source field for accuracy. If the source is not correct, highlight the source and put in the correct one. If it is a significant change and the collection location needs to confirm, then follow standard protocol for "Specimen Labeling Release Form".



14. Lastly, the resident/fellow should advance the case to the "**Resident Review Complete**" status. While you are in Case Results, you can press the **Advance Status** button to change the status from **Gross Done** to

Resident Reviewed.



Flag a case or specimen with additional information

1. In **Case Builder** or **Case Results**, click **Case Info** from the **Actions** button at the top right of screen.
2. Select the tab for the level at which you want to add the note or flag.
3. Select any flags and enter the notes that you want to appear.
4. Click **Accept**. The flags and notes appear in the report in Case Builder, as well as in other activities, such as Case Results and In Basket.

Add a diagnosis to a case

The Diagnoses table appears in the below the Charges table in the Charges section of Case Results. Here, you can enter ICD-9 or ICD-10 codes to associate with the case. These can be diagnoses for ordering, resulting, or billing purposes. There are three ways to add a diagnosis:

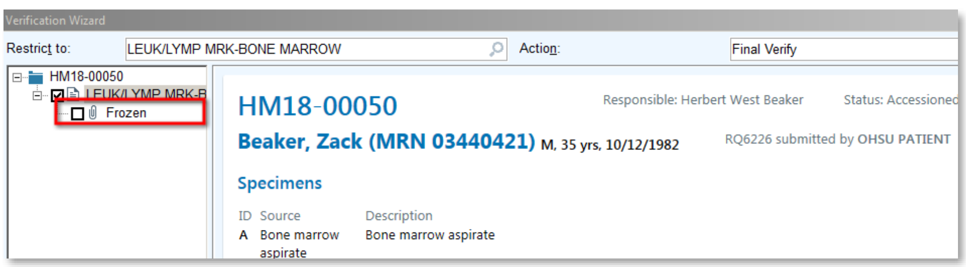
- Enter the diagnosis code in the **Code** field.
- Enter part of the diagnosis name to search for it (for example, "liv can" for liver cancer).
- Select a word or phrase in the case report on the right and click **Find**.

Sign Out a Case using the Verify button:

Residents and fellows do not have the security rights to sign out a case. When the pathologist is ready to sign out the case, the Verify button will be used. There are several verification options available when you click the **arrow** next to **Verify** on the **Case Results** activity toolbar:

Final Verify	Releases results to the patient's chart and sends the results to the patient's primary care provider. Most common choice.
Prelim Verify	Sends results to the patient's chart with a preliminary status.
Pend Final	Indicates to a supervisor that final results are ready to be reviewed.
Pend Prelim	Indicates to a supervisor that preliminary results are ready to be reviewed

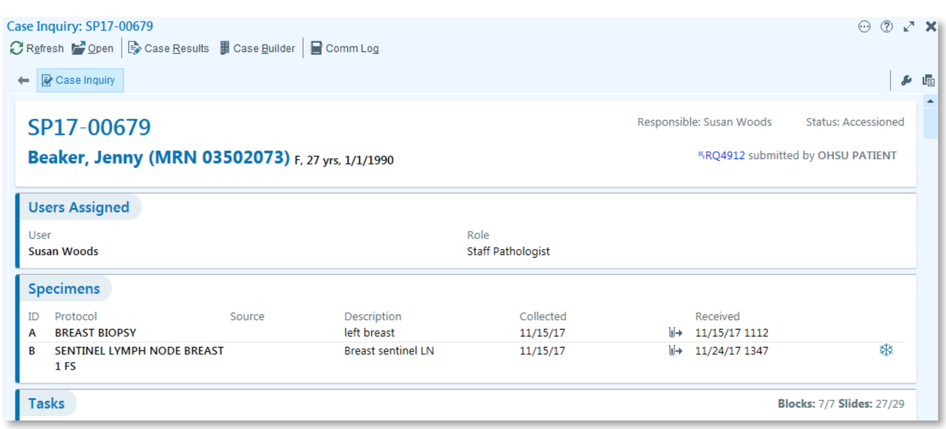
1. When you click the **Verify** button directly, the system assumes you want to final verify the case.
2. This will bring you to the Verification window which will list the case and any scanned documents on the left side of the screen.
   a. Make sure those checkboxes for the scanned paperwork are NOT checked off so that those documents do not go to the chart before pressing the **Final Verify** button.



3. The Verification window will force you to scroll through the case for review. When you get to the bottom, the **Final Verify** button will be active and you can click on that button to verify the case.

Looking up case information via Case Inquiry:

Case Inquiry provides the complete picture of a case. It shows specimens, tasks, tracking events, and the result report. You can access the **Case Inquiry** activity from the Actions button in many different activities, including Case Results, Case Builder, Case Prep Work List, Case Receiving, and Tracking. You can also access Case Inquiry from the Outstanding List by selecting and right clicking on a case.



Edit a Signed Out Case:

Addenda and amendments

There are two ways to make changes to a signed out case. Which you choose depends on the type of edits you're making:

- Addendum - use to add information to a case
- Amendment - use to change the results of a case

Document an addendum

1. Open the case in Case Results and click **Addendum** on the middle toolbar.
2. Review the information in the Addendum Authorization window and click **Addendum** to authorize the addendum.
3. Select an appropriate addendum title and enter your additional findings.
4. Final verify the case with the addendum.

Document an amendment

1. Open the case in Case Results and click **Amendment** in the Actions menu.
2. Select the check box for the case in the left pane of the Amendment Authorization window.
3. **IMPORTANT: Make sure to select a reason for the amendment!**
4. Click **Result Correct**.
5. In the Case Results activity, click **Results** and correct the necessary information.
6. When you are done, final verify the case.

Unlike an addendum, which is appended to the existing case report, an amendment is an edit to the existing case report. This means clinicians see the amended report, but can also review the original report in Case Inquiry to see which results were changed.