Pathologist/Resident: Surg Path Guide:

Reviewing Clinical History:

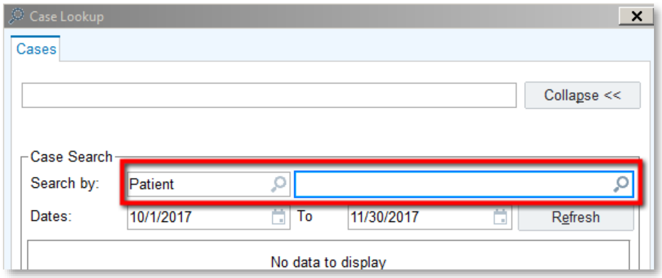
1. Residents/Fellows: After receiving the tray of slides, you can scan a slide's barcode while you are in the **Outstanding List** to open up **Case Results**. The first step for working on a case in Beaker is to examine any clinical history that might be pertinent to the case. There are 4 areas you 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)** will show a summary of past results. **Current Case Info** that will show 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** shows the collection questions, list of specimens, and tasks. (See the **Pathologist/Resident Basic Guide** for instructions on how to add these buttons.)
    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. This will give you access to the patient's complete chart. The **Encounters tab** will detail any events and notes that the patient has had. The **Lab tab** will list any blood or body fluid 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**).

Refer to the **Pathologist/Resident Basic Guide** for screenshots of these 4 activities.

Entering the Final Diagnosis in Case Results:

1. To enter the Final Diagnosis 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.

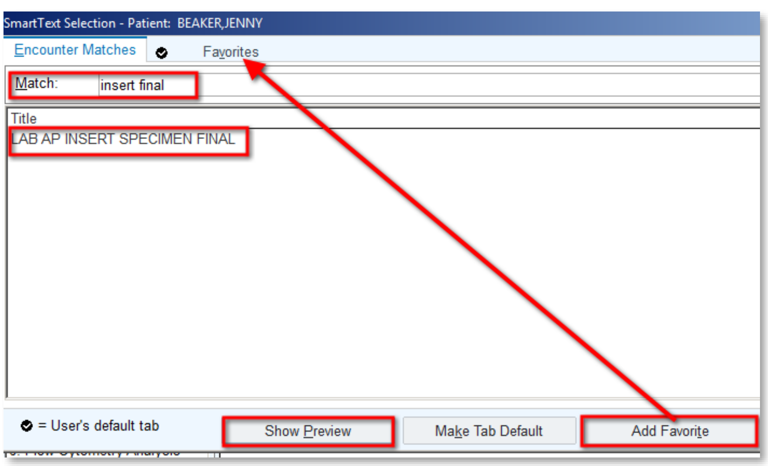
i. Alternately, you can search by Patient name in this window by clicking the **Expand** button. Search for the patient's name (Format: Lastname, Firstname).



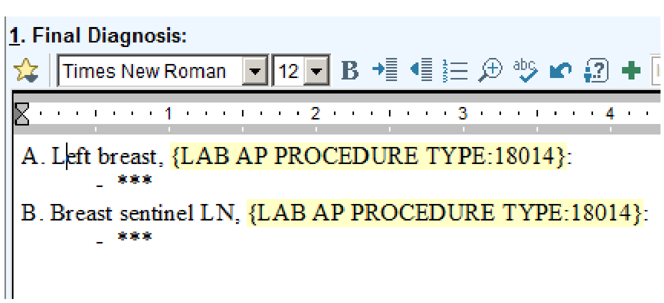
2. When **Case Results** opens, click on the **Results** button in the middle of the screen.

1. On the left side of the screen, make sure **1. Final Pathological DIagnosis** is selected. Click your cursor in the text area to the right of the component list. Type "**insert final**" in the Insert SmartText field and press Enter.

2. The SmartText Selection window appears. Choose LAB AP INSERT SPECIMEN FINAL. 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.



3. This template pulls in the text that was extered in the **Description** field from **Case Builder** for each specimen.



a. Note the yellow text in the { } brackets. Curly brackets means that there is a **SmartList** dropdown menu. Make sure you put your cursor somewhere before the SmartList and click **F2**. That will bring up the choices available. Left click to select a choice, and right click to accept the choice.

Refer to the **SmartTools Quick Guide** for more information about using SmartLists.

4. Fill out the rest of the **Final Pathological Diagnosis** component by pressing **F2** to complete any SmartLists or 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.

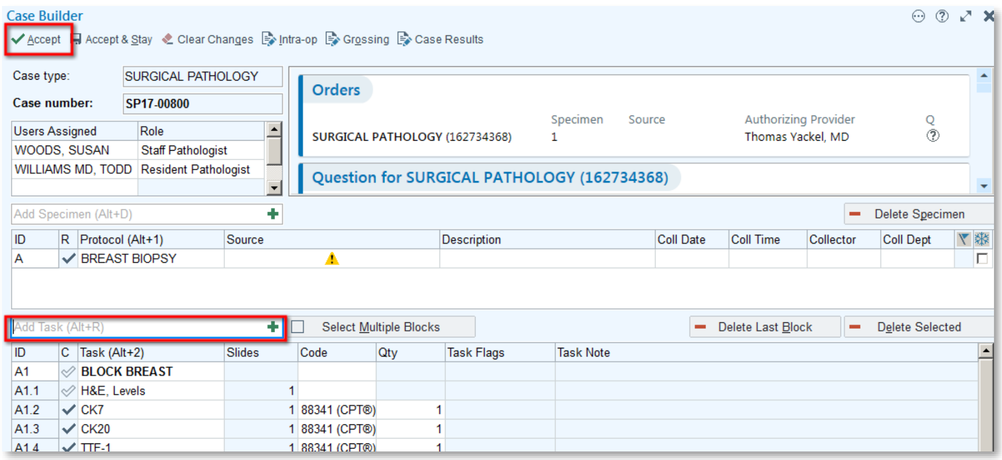
    a. You can press **F3** to make the **Final Pathological Diagnosis** component window bigger. This allows you to use the Tab key to indent your text. When you use tab key outside of the F3 window, it will just tab you to the next component in the list.

    b. Click the **Accept** button at the bottom to get out of the larger F3 window.

5. At this point, you can click on the **Case Builder** button to go to **Case Builder** to order additional stains or tests.

Request additional stains or tasks in Case Builder

1. After reviewing the case, you may want to request additional stains and tasks for a specimen. Additional requests can be made in the **Case Builder** activity.
    a. To quickly access **Case Builder** while you're entering results, click **Actions** button in the upper-right corner and select **Case Builder**.



Adding Tasks:

2. Select the specimen that needs additional stains or tasks.

3. **To add more tasks:** In the **Add Task** field, search for the task protocol you want to add. (Hint: type part of the name and press Enter to narrow down the choices of tasks.) 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. Note: For Surg Path cases, don't choose stains labeled for Derm Path.

    b. 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.

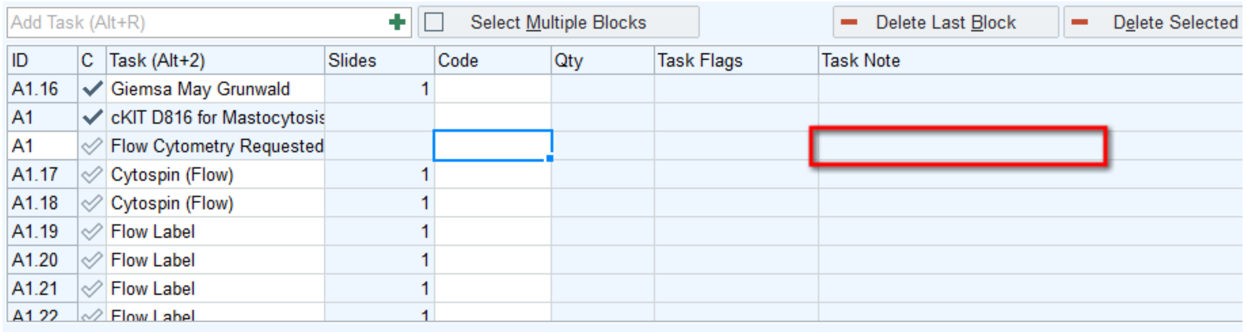
    c. If you would like to order a flow sort on the case, type in "flow" in the Add Tast field. Check off the task "**FLOW SORT**". This will add the task "Flow Sort" in the task list. This task requires a task note to let Flow know what you would like them to perform. See next section about adding Task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

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

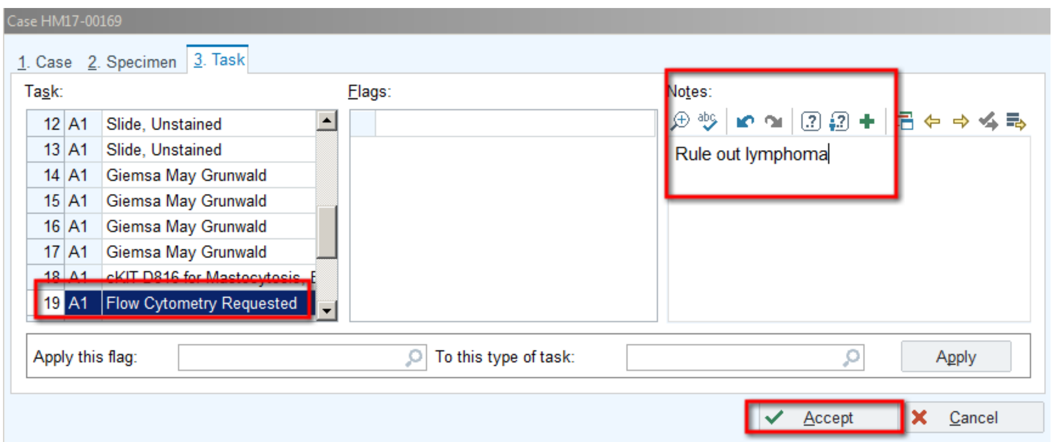
Adding Task Notes:

Sometimes you need to add a note to a task to give the lab technicians extra information. For example, if you order "Flow Cytometry Needed" or a "Flow Sort", the techs need additional information to process the test.

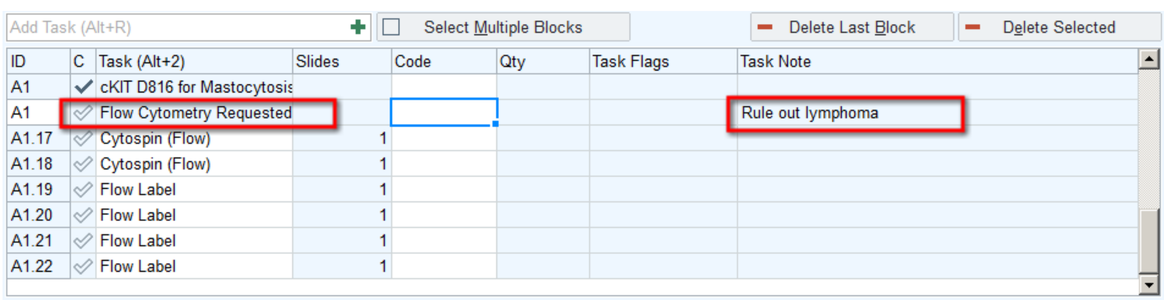
1. To add a task note, the easiest way is to find the task in the Task list that you want to add a task note, and click on the grey field under the column **Task Note** for that row.



2. It will bring up the **Case Info** window. Type in the note you want to add for that particular task. Click the Accept button.



3. In **Case Builder**, you will see the task note listed.



Refer to the **Pathologist/Resident Basic Guide** for more details about adding tasks and task notes in Case Builder.

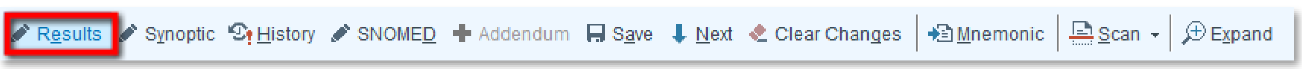
Ordering Molecular tests or FISH tests:

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.

I. **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.

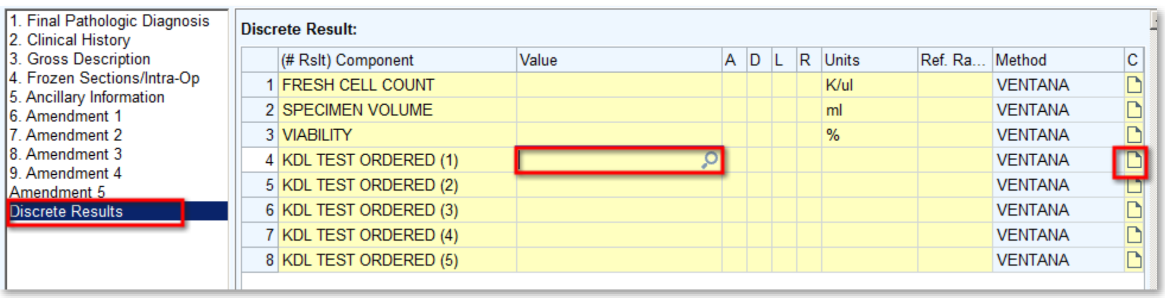
If you would like to order the molecular/DNA/FISH tests in Case Results yourself:

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



2. Click "**Discrete Results**".

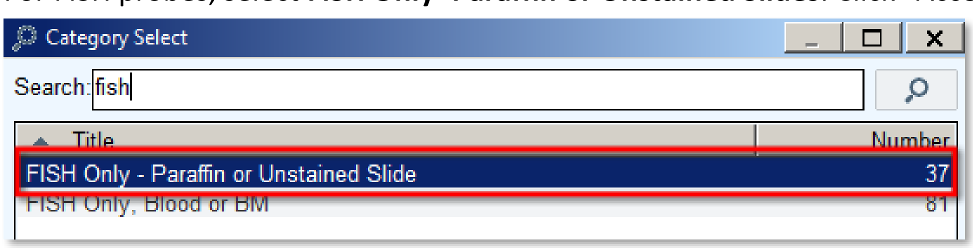
3. Click in the **Value** field for one of the KDL Test Ordered.



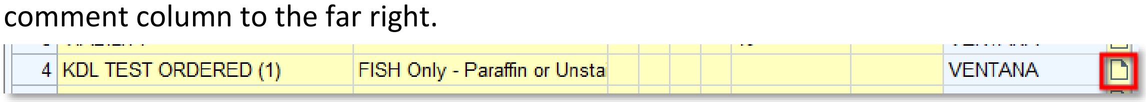
4. Click the Magnifying Glass to the right side of the field.

   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".

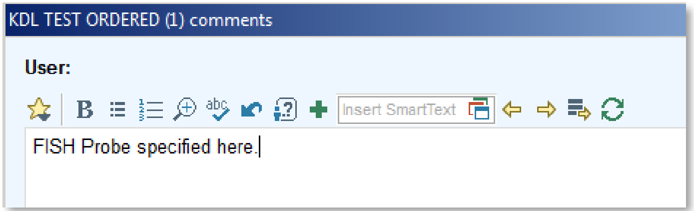
   b. For FISH probes, select **FISH Only- Paraffin or Unstained Slides**. Click "Accept".



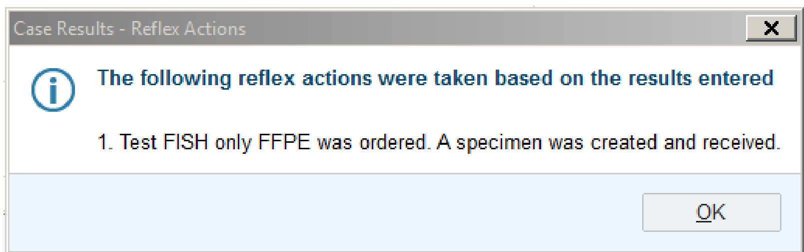
      i. After selecting the FISH Only-Paraffin or Unstained Slides and Accepting, click into the comment column to the far right.



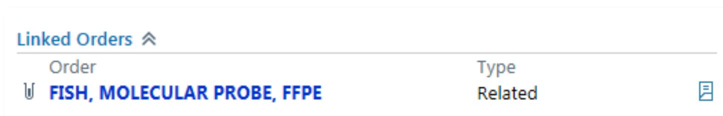
ii. Enter the corresponding FISH probe. Click “Accept”.



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.



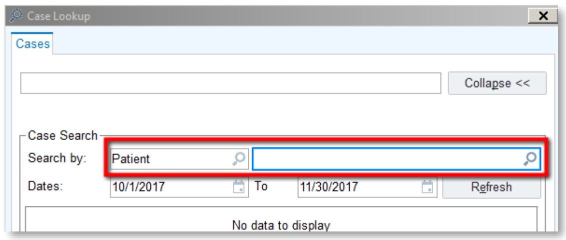
6. Click “OK”. A new KDL CP test specimen ID # will be generated and the histotechs/IHC techs will be able to process and send that test to KDL. You should also see the linked order in the right side of the bottom Case Results window.



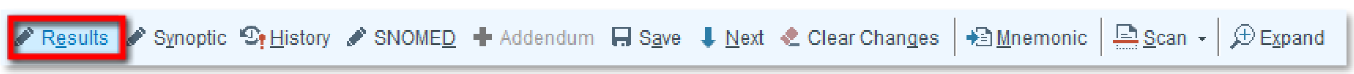
7. At this point, if there are no other molecular or FISH tests that need to be ordered, then you can continue the process of signing out the case.

Entering Discrete Results in Case Results:

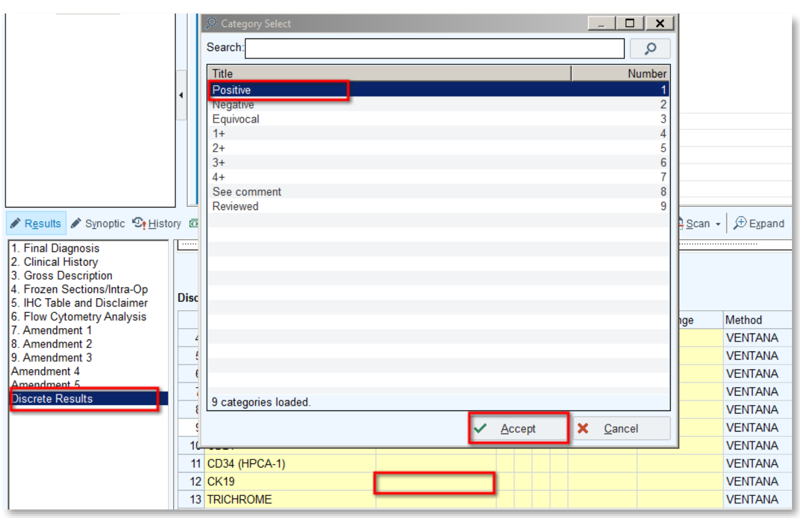
1. To enter the Final Diagnosis information after reviewing the case and slides, you will need to go to the Case Results activity. There are several ways to open a case in **Case Results**.
    a. The most efficient way to enter **Case Results** is to scan the specimen's barcode while you are viewing 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. To enter Discrete Results for tests, click on the **Discrete Results** component on the left side of the screen.
4. Click on the **Value** field of the test you want to result. This will bring up a **Category select** window, choose the result that applies. If you would rather not put a result in the Discrete field, then pick **Reviewed**. Click the **Accept** button.



5. When you are done adding results to the component you were editing, click the **Save** button on the middle toolbar.

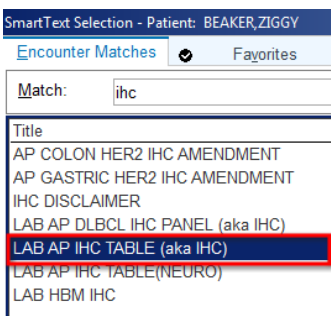
Adding information about IHC results:

After typing IHC results into the Discrete Fields, you can document your IHC stain results in 2 ways. Either you can type the results directly as a comment in the Final Pathological Diagnosis/Ancillary Information components or you can pull in a table that includes the information you put in the Discrete Results in a formatted table with room for comments. Either way, you need to add the IHC disclaimer either in the Final Pathologiscal Diagnosis or Ancillary Information components (See the following Steps 7-10).

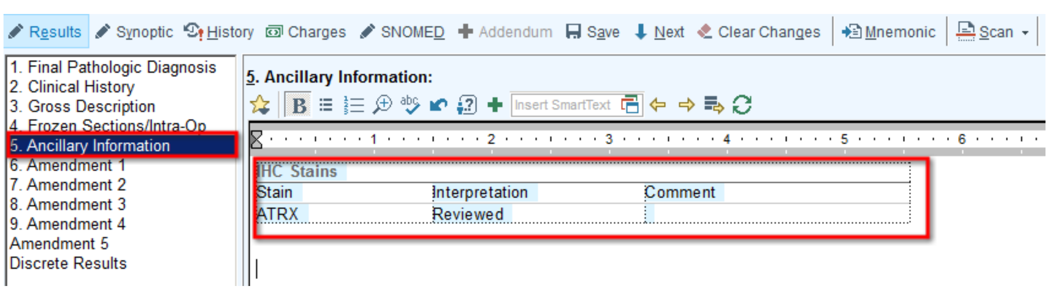
Using the IHC Table SmartText:

1. If results have been entered in the Discrete Results component for IHC stains, you can pull a table of those results into the Ancillary Information component.
2. Select the **5. Ancillary Information** component. Put your cursor in the text field where you would like the table to appear.
3. Type “ihc” in the **Insert SmartText** field.

4. Choose the “LAB AP IHC TABLE(aka IHC)” choice and click the **Accept** button.



5. A table will appear in the Ancillary Information component. You can add comments to the table by clicking on the **Comment** cells in the table. NOTE: If the Discrete Results component changes such as if new results are entered, this table will not update. Delete the table and re-insert the SmartText again to refresh the results.

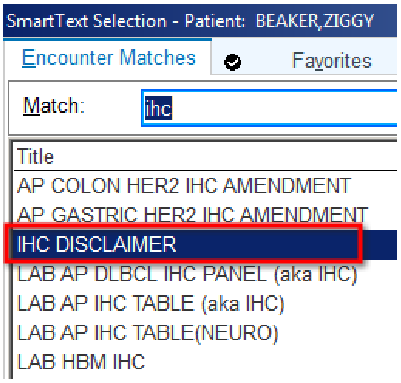


6. If you want to type Comments into the table, click in the appropriate box in the table. NOTE: If it does not let you edit the table, right click on the table and choose “Make Selected Text Editable”.
7. If you want to add extra rows to bottom of the table, you can put your cursor in the last row and right click on that row. Choose **Insert Rows**. Choose how many rows and check off the “Append Rows to end of Table”. That will add the requested amount of rows to the table to add more stains or comments.

Using the IHC Disclaimer SmartText:

8. The IHC disclaimer should pull into the Ancillary Information component automatically if there is an IHC test ordered. If it does not pull in, you may need to pull in the disclaimer for the IHC results. Put your cursor somewhere after the table or your manually typed in comments and type "**ihc**" in the Insert SmartText field.

9. Choose the "IHC Disclaimer"



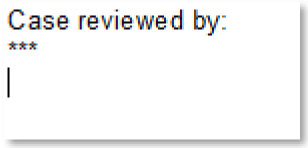
10. This will insert the following text:

"Analyte specific reagents are used in many laboratory tests necessary for standard medical care. This test was developed and its performance characteristics determined by OHSU laboratories. It has not been cleared or approved by the US Food and Drug Administration (FDA). FDA does not require this test to go through premarket FDA review. This test is used for clinical purposes. It should not be regarded as investigational or for research. This laboratory is certified under the Clinical Laboratory Improvement Amendments (CLIA) as qualified to perform high complexity clinical laboratory testing.)"

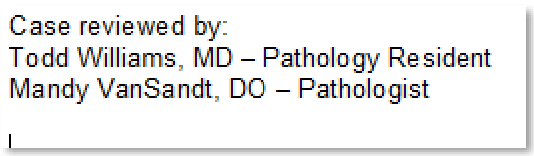
11. Press the **Save** button.

Reviewing the Case in Case Results:

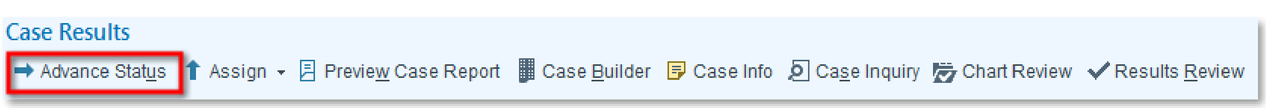
1. In the Final Pathological Diagnosis component, look for the text that says “Case Reviewed by:”



2. Use F2 to highlight the ***’s and use your **.name** Smartphrase to replace the wildcards.. Press Enter and type in the .name for the pathologist. If there is a 2nd resident/fellow who worked on the case, make sure that name and title are also listed.



3. When you are done adding results to the Final Diagnosis, click the **Save** button on the middle toolbar.
4. 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.
5. The resident/fellow and the pathologist will go over the results in the Final Pathological Diagnosis. 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.
6. 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 .names in the **Final Pathological Diagnosis** are two ways that resident/fellow involvement will be tracked.
7. 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 the “Specimen Labeling Release Form”.
8. 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**.

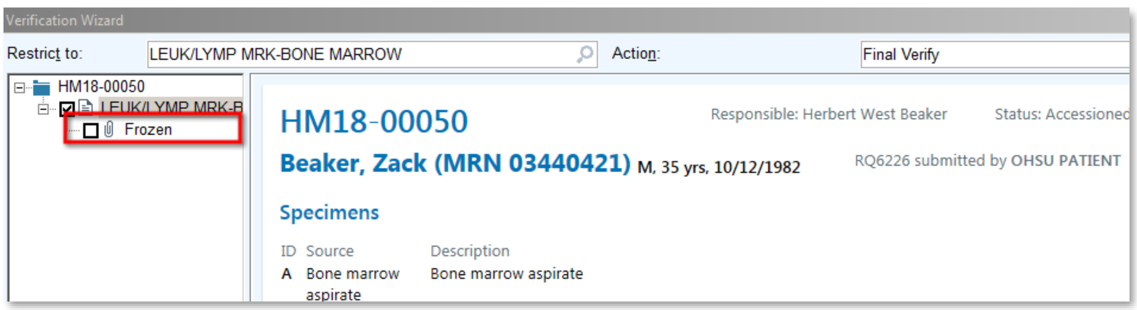


Sign Out a Case using the Verify button:

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.

Edit a Signed Out Case:

Pathologists have the security rights to addend and amend a 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.

This guide is based on Epic 2017.