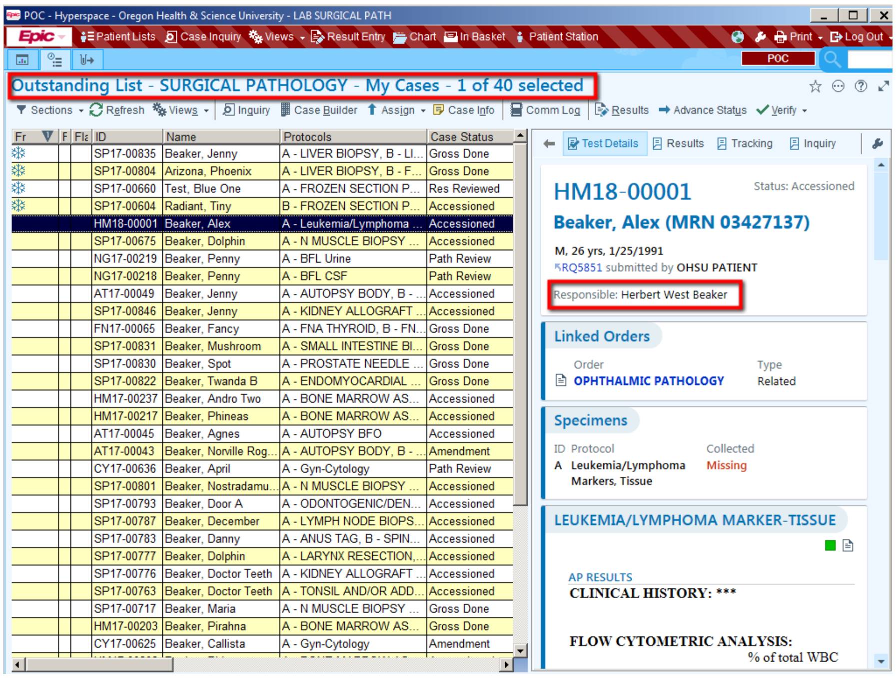
Pathologist/Resident Basics Beaker AP Guide:

Finding cases in the Outstanding List:

1. Cases that need to be resulted or reviewed before signout appear on the **Outstanding List**.
   a. You can get to the **Outstanding List** by clicking on the of your startup activities or clicking the **Outstanding List** link from your Dashboard.

   b. Make sure you are viewing the **My Cases** view. This view will show the cases assigned to you. o change your view, click on the **Views** and selecting a view from the list.



2. You can use the column headers to filter and sort the list.
   a. To sort by a column header, left click on any of the headers and it will sort the list by that column alphabetically(ascending). If you click the same column header again, it will sort descending.

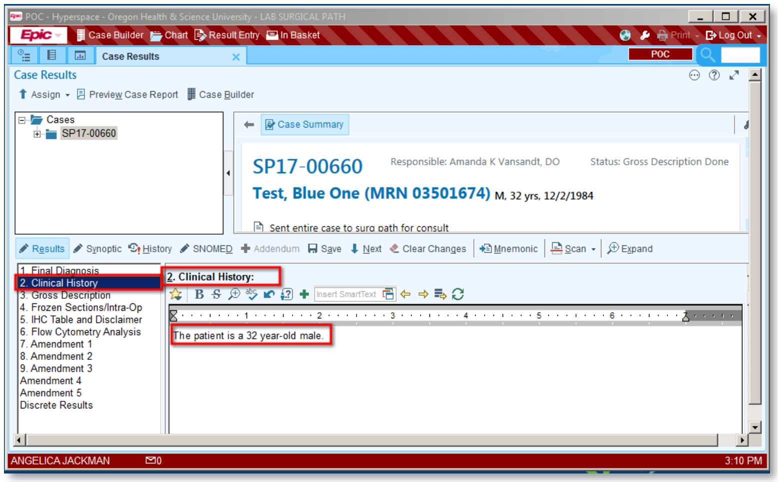
   b. To filter the list, right click on a column header and choose **Filter By**. It will list all the choices that exist in the current list. Choose one and it will only show those cases. You can clear your filters by clicking on any column header and choosing **Clear All Filters**.

3. To enter **Case Results** for a case, double-click the case in the **Outstanding List** or select the case and click the **Results** button. You can also scan a barcode from the **Outstanding List** to go to **Case Results**.

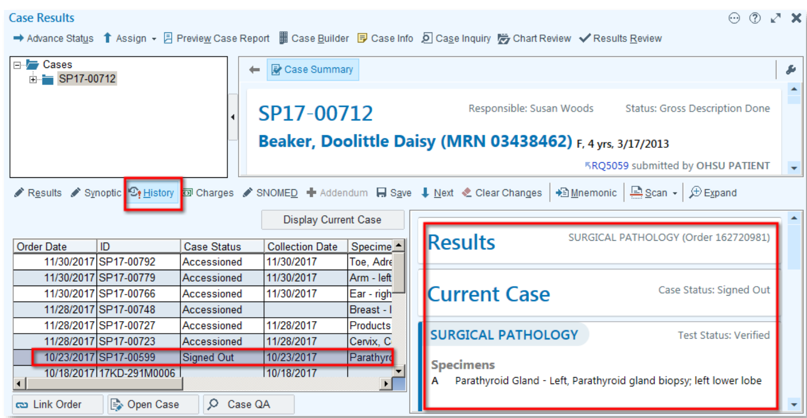
Reviewing Clinical History:

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.

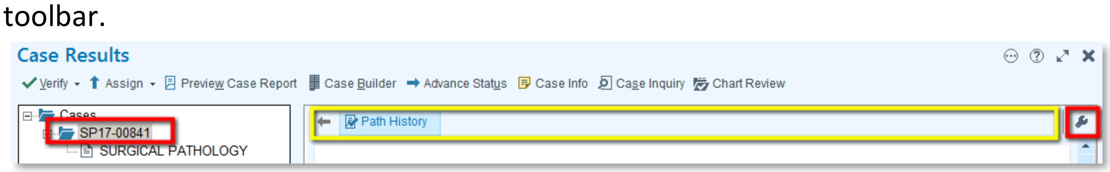


   b. **History Button in Case** Results – By clicking the **History** button, you will get a list of past AP cases for this patient. By selecting a case on the list to the left, the case information will display on the right side.

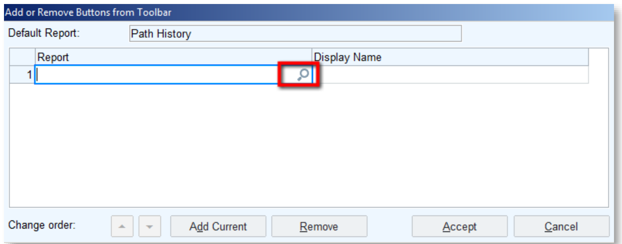


   c. **Case Summary** and **Current Case Info** button in **Case Results -** You can add buttons to your Case Results button bar:
   * **Path History (default)** – displays information about past results.
   * **Current Case Info** - displays a cleaner summary of the case results. It is similar to using the 'Preview Case Report' button without the extra print letterhead sections.
   * **Case Summary** - show the collection questions, list of specimens, and tasks.

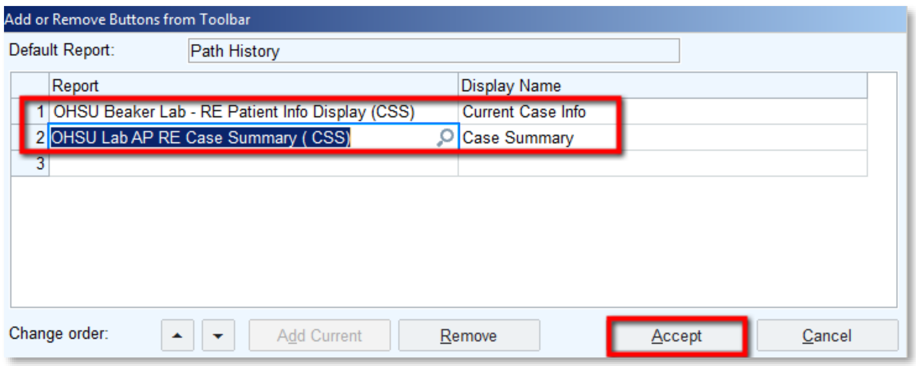
      i. Make sure you have the **Case ID** selected on the left side of **Case Results**. Notice that the default button on this bar is **Path History**. Click on the **wrench** icon on that toolbar.



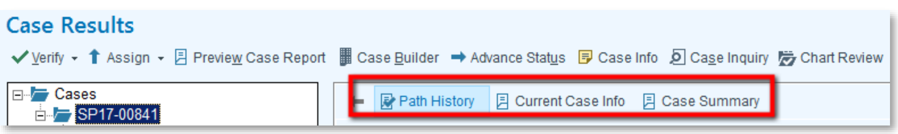
ii. The following window will appear. Click on the magnifying glass icon to bring up other choices.



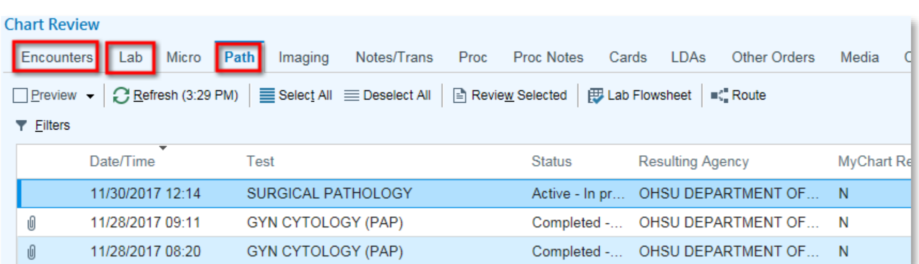
iii. Select **OHSU Beaker Lab – RE Patient Info Display (CSS)** and click the **Accept** button. Click the 2nd row and click on the 2nd row's magnifying glass icon. Select **OHSU Lab AP RE Case Summary(CSS).** Click the **Accept** button. You should have 2 rows filled out as below. Click on the **Accept**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

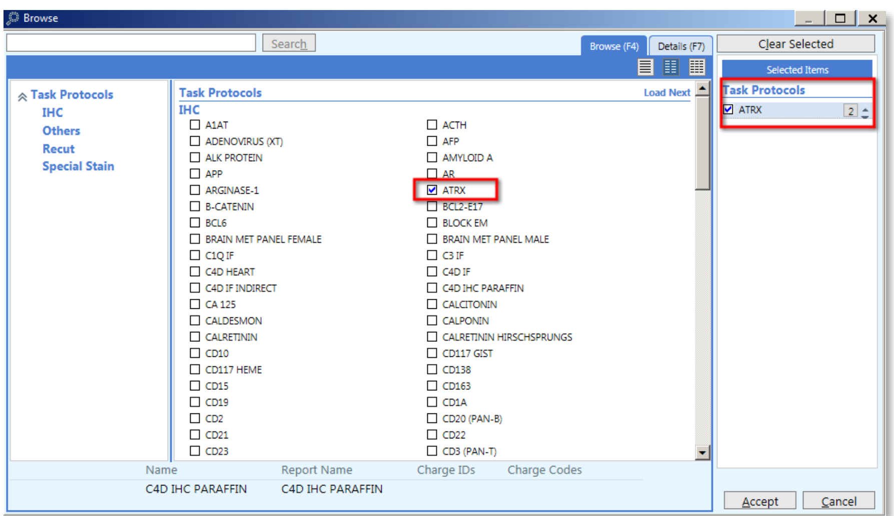
1. After reviewing the case, you may want to request additional stains and tasks for a specimen. Additional requests can be made in the **Case Builder** activity.
    a. To quickly access **Case Builder** while you're entering results, click Actions button in the upper-right corner and select **Case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

Add a task protocol

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

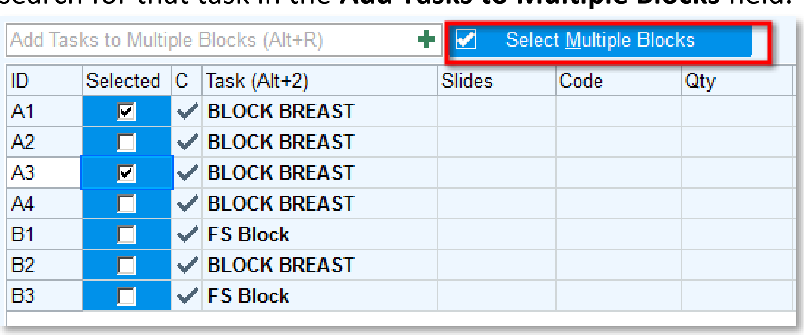
> Tasks are specific to the specimen protocol and can only be viewed when the appropriate specimen protocol is selected in the specimen protocol table.

1. In the **Add Task** field, search for the task protocol you want to add. Select the appropriate task protocol. You can specify the quantity for a certain task by using the arrows next to the Task Protocols on the right.



2. Click the **Accept** button when you have chosen the task protocols you want to add. The tasks that are part of the task protocol appear in the Task table.

3. If there are multiple blocks for a specimen, you can click the **Select Multiple Blocks** to narrow your task list to only the blocks you specify. Once you've selected the blocks to which you'd like to add a task, search for that task in the **Add Tasks to Multiple Blocks** field.



Delete specimens and tasks

If the case hasn't yet been accepted, deleting an item completely removes it from the case.

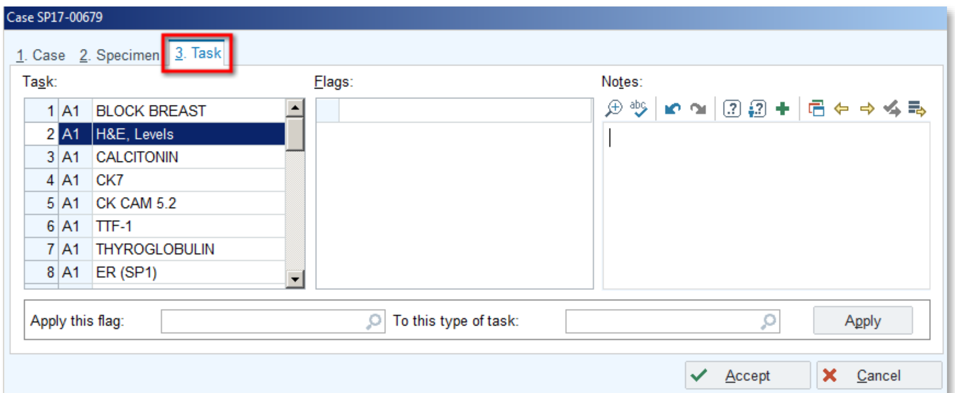
If the case has already been accepted, the deleted item appears with a line through it to indicate that it doesn't need to be processed or performed and that charges won't be filed for it.

> 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.**

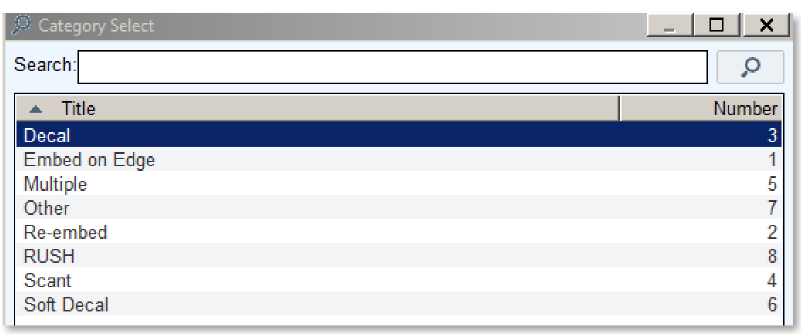
- To delete an entire specimen, along with all of its blocks and tasks, select the specimen in the Specimen table and click **Delete Specimen**.
- To delete a block and all tasks on the block, select one task on the block and click **Delete Block**.
- To delete a task, select the task and click **Delete Task**.

Adding Task Flags and Notes:

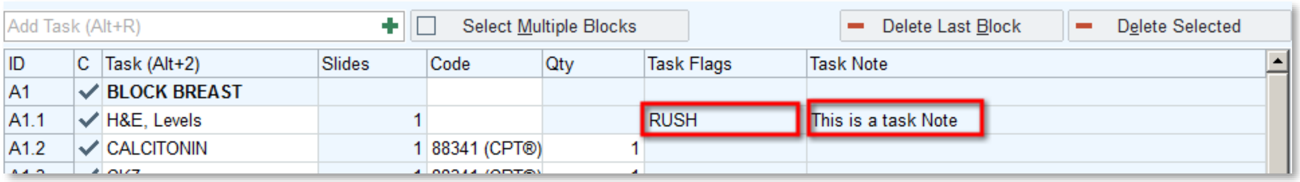
1. To add **Flags** or customizable free text **Notes** to a task, select the task and click in the Notes column. That will bring up a Flag and Notes window for that particular case.



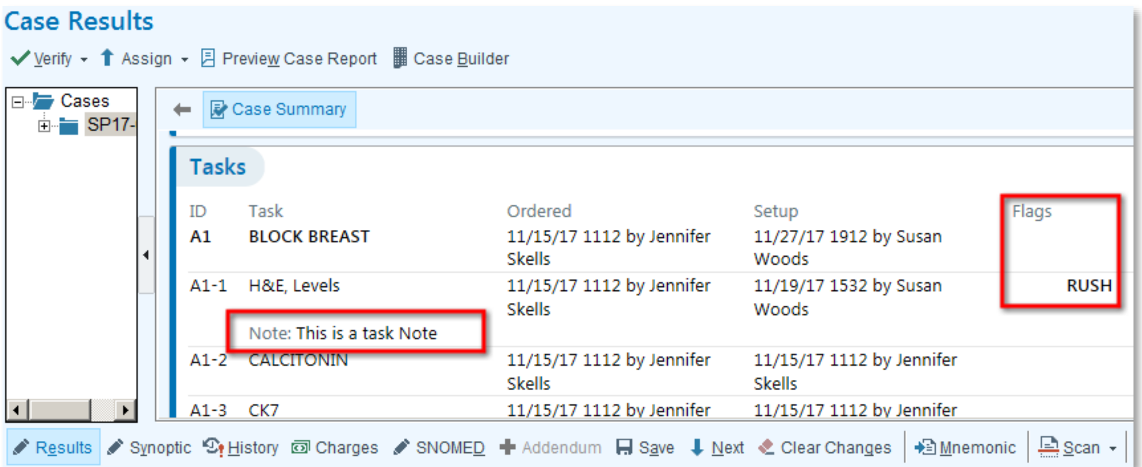
2. The task you picked should already be highlighted, but confirm that the selection is correct. In the **Flags** column, click on an empty row and then click on the magnifying glass icon. This will allow you to pick off a list of preset **Flag** options. Choose one and click the **Accept** button.



3. To add a Note: Make sure the appropriate task is selected, and just type in the **Notes** text box. Click the **Accept** button.
4. Back in **Case Builder**, the flag and/or note you entered should display in the same row as the task.



5. To see the flags and notes for a task for a case, open the case in **Case Results** and in the top right **Case Summary** area, scroll down the list to the Tasks section.



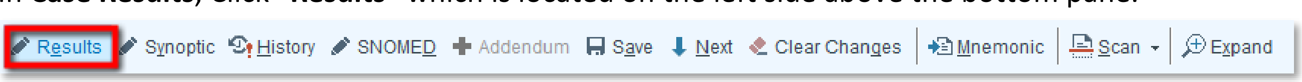
Ordering Molecular tests or FISH tests:

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.

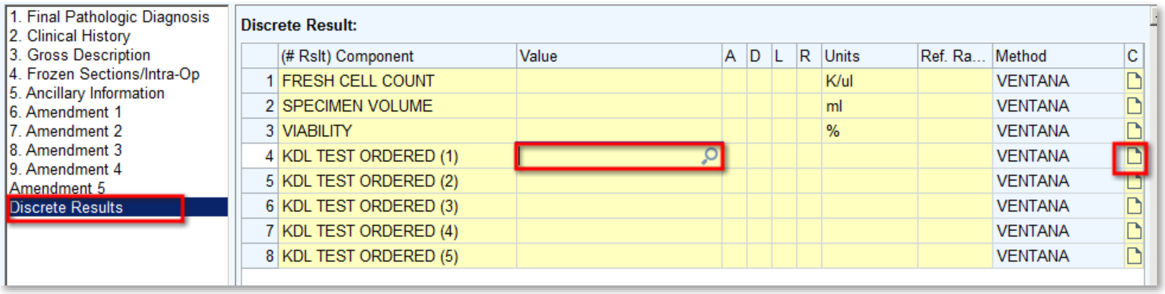
If you would like to order the molecular/DNA/FISH tests in Case Results yourself:

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

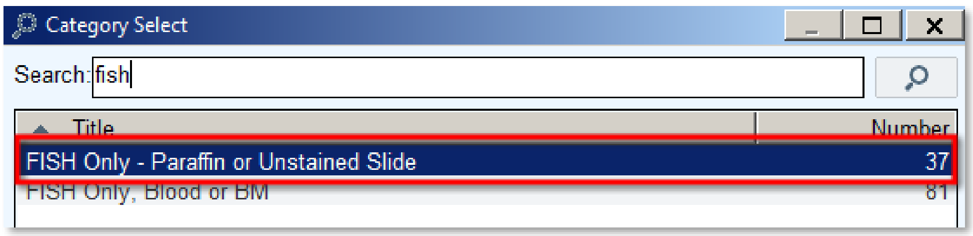


2. Click “**Discrete Results**”.

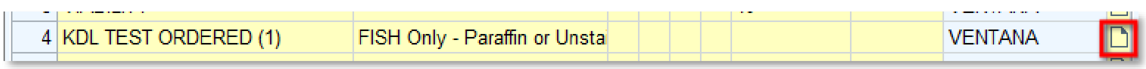
3. Click in the **Value** field for one of the KDL Test Ordered.



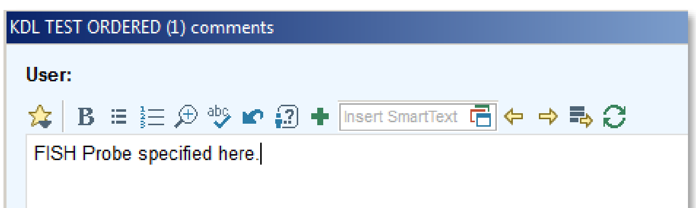
4. Click the Magnifying Glass to the right side of the field.
   a. All molecular tests will be listed. Select the test that corresponds to the task. **Make sure you are ordering the correct test for the specimen type. Tests for blood or BM will NOT reflex for tissue samples.** Click "Accept".
   b. For FISH probes, select **FISH Only- Paraffin or Unstained Slides**. Click "Accept".



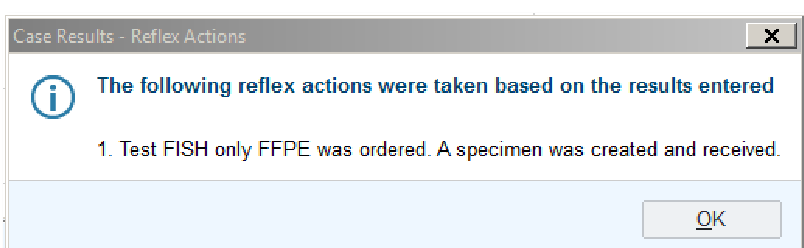
      i. After selecting the FISH Only-Paraffin or Unstained Slides and Accepting, click into the comment column to the far right.



      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.

Assign responsibility for a case:

You can assign or take responsibility for a case in several ways:

- Start working on the case: You are automatically assigned responsibility when you advance the case status or enter certain key information, such as the interpretation for a cytology case.
- 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.

Entering Results in Case Results:

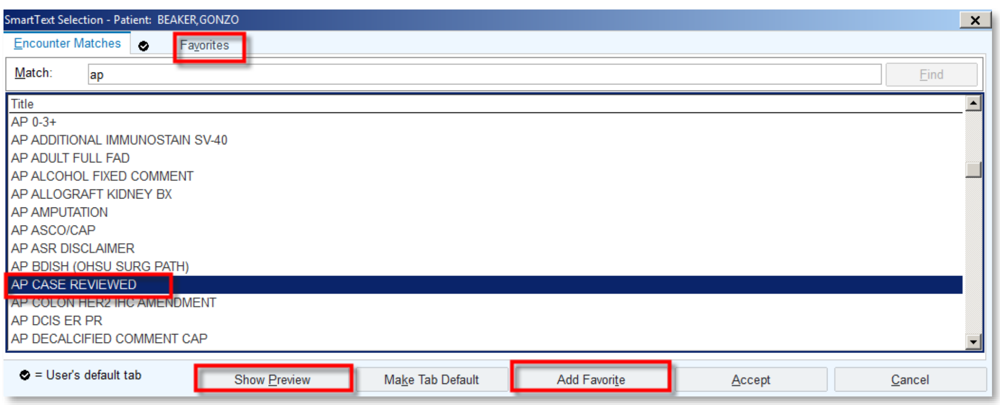
1. When you double click on a case on your Outstanding List, it will open up **Case Results**. Click on the **Results** button in the middle of the screen.
2. On the left side of **Case Results** is a list of components that make up the different results for a case. Selecting one of the components on the left will bring up a free text window or result fields, depending on your choice.

Using SmartText to enter results:

SmartTexts are standard templates or blocks of text typically used to speed up data entry.

1. Click on the component on the left side of the screen to be able to edit the text for that component.
2. Enter a few letters of the SmartText's name in the **Insert SmartText** field.

3. Press **Enter**. A window will appear that will allow you to see a list of available SmartText choices. To preview what a selected SmartText looks like, click the **Show Preview** button. If the selected SmartText is one you will use often, select the Smart text and click the **Add Favorite** button. That will add that SmartText to the **Favorites tab** at the top of the window. Select a SmartText and click the **Accept** button.



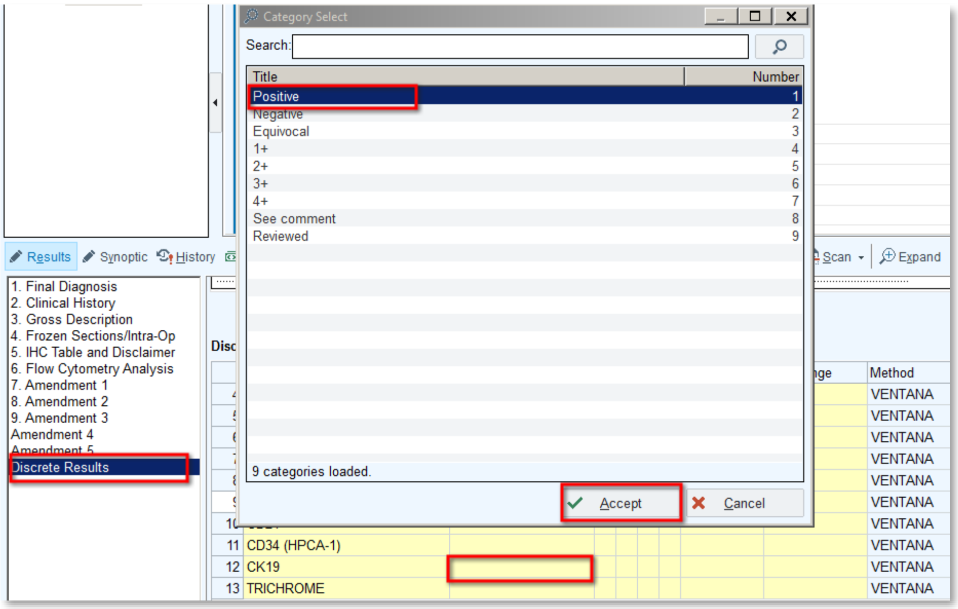
4. Press **F2** to complete any SmartLists or wildcards (***). To be

For more information on using SmartText phrases, refer the the **SmartTool Quick Guide.**

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

Entering Discrete Results in Case Results:

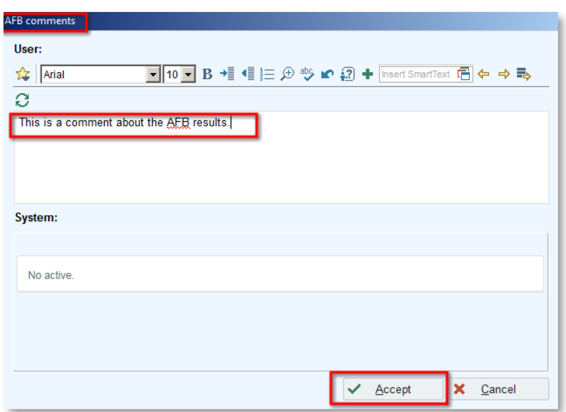
1. To enter Discrete Results for tests, click on the Discrete Results component on the left side of the screen.
2. Click on the **Value** field of the test you want to result. This will bring up a **Category select** window, choose the result that applies. Click the **Accept** button.



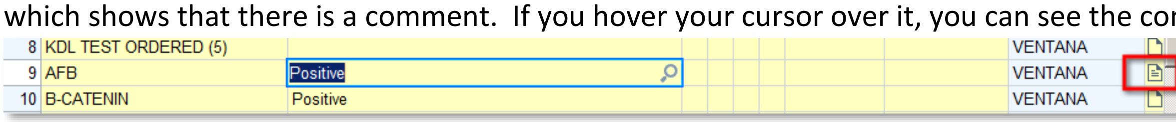
3. When you are done adding results to the **Discrete Results** component, click the **Save** button on the middle toolbar.

4. If you have comments about a specific test's discrete results, you can click on the page icon at the end of the row.

5. This will bring up a window to allow you to enter comments. Enter the text, and click the Accept button.



6. After you save your comments, you can see the Comment icon has changed to have lines in it, which shows that there is a comment. If you hover your cursor over it, you can see the comment.



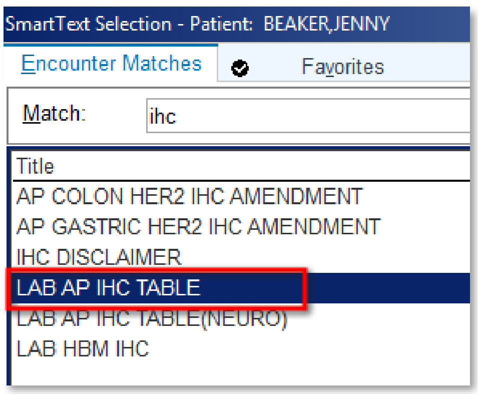
Adding IHC Information to the Ancillary Information component:

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. Make sure you press the **Save** button after entering **Discrete Results**.

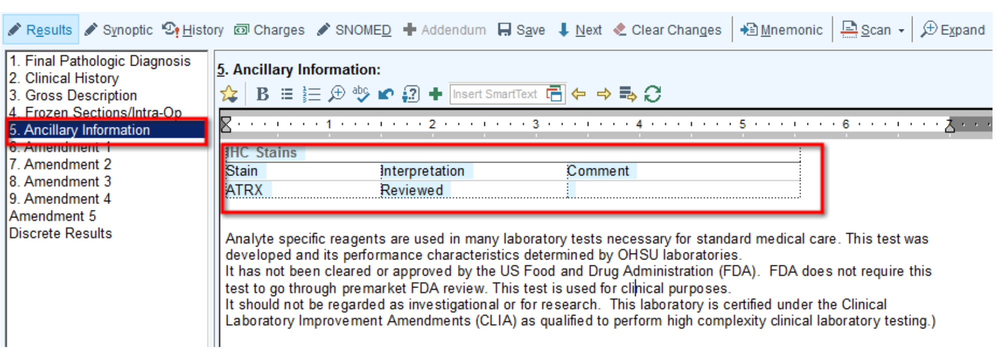
2. Select the **Ancillary Information** component. Put your cursor in the text field where you would like the table to appear.

3. Type "ihc" in the **Insert SmartText** field.

4. Choose the "LAB AP IHC TABLE" choice and click the **Accept** button.



5. A IHC table will appear in the **Ancillary Information** component. You can add coments 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 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.

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.

Enter discrete info with synoptic reports

1. To choose a synoptic report, click **Synoptic** in the middle toolbar.
2. Use keywords to search for an appropriate report and click **Accept**.
3. Fill out the report. Required fields are marked with a icon.

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**.

Preview the case report

After making edits in Case Results, preview the case report to make sure everything looks correct. Click **Save** on the middle toolbar to see a preview of the revised information.

You can also click **Preview Case Report** on the activity toolbar to see a preview of what the printed report will look like.

Check Source in Case Builder:

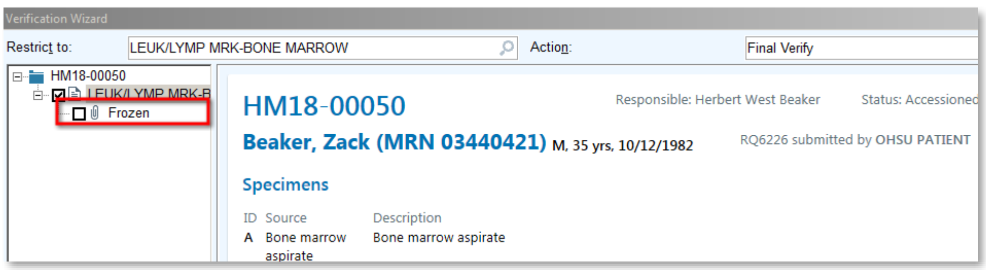
While in **Case Builder**, check the source field for accuracy. If the source is not correct, highlight the source and put in the correct one. If it is a significant change and the collection location needs to confirm, then follow standard protocol for “Specimen Labeling Release Form”.

Sign Out a Case using the Verify button:

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

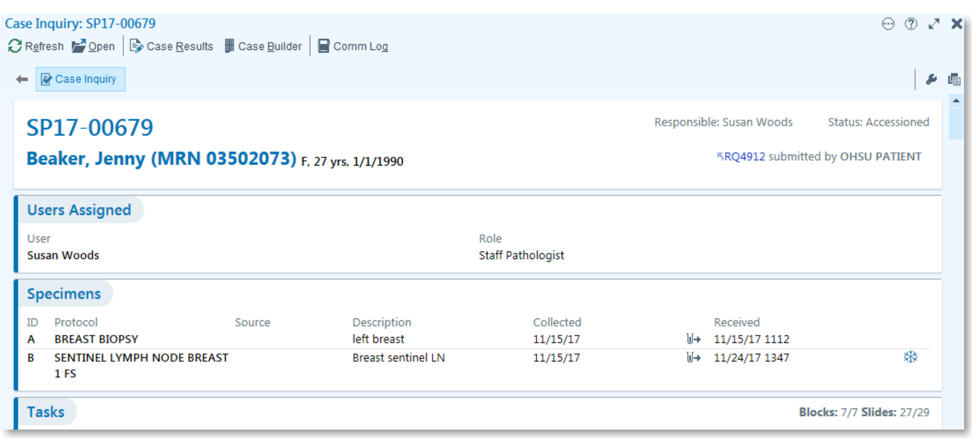
1. When you click the **Verify** button directly, the system assumes you want to final verify the case.
2. This will bring you to the Verification window which will list the case and any scanned documents on the left side of the screen.
   a. Make sure those checkboxes for the scanned paperwork are NOT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



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.

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.

1. IMPORTANT: Make sure to select a reason for the amendment!

2. Click **Result Correct**.
3. In the Case Results activity, click **Results** and correct the necessary information.
4. 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.