

Surg Path: Kidney Accessioning-Beaker AP Guide:

Creating a Kidney Case in Req. Entry:

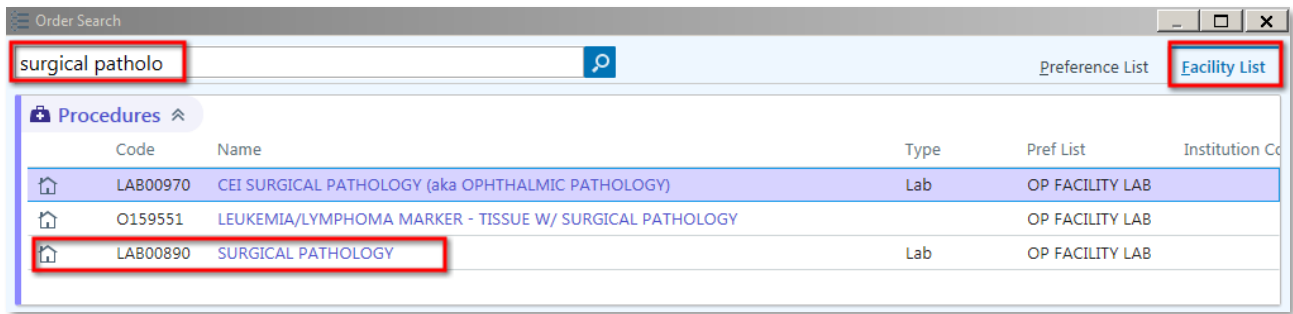
1. Use Chart Search to open **Requisition Entry** or find the link to **Requisition Entry** from your starting Dashboard.

The screenshot shows the 'Requisition Entry' form with the following fields and callouts:

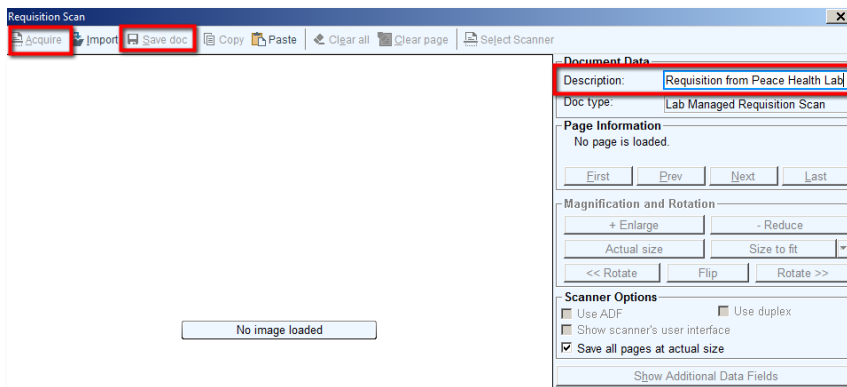
- 11: Scan button
- 2: Accept & New button
- 3: Patient field (YELLOW, PEPPER)
- 4: Ref Lab No. field (SC17-1234)
- 5: Code field (Z01.89)
- 6: Bill to field (Client Bill)
- 7: Procedure field (SURGICAL PATHOLOG)
- 8: # of Spec. field (1)
- 9: Priority field (Routine)
- 10: Q field (1)
- 12: Case Builder button


Procedure [6]	Specimen/Case	# of Spec. [8]	Status	Specimen Type [9]	Priority	Specimen Source	Q [10]	C	H	L
1 SURGICAL PATHOLOG		1	Ordered	Tissue	Routine		1			
2										

2. Enter the submitter information in the **Submitter:** field. If this is an industrial account, search for the company name. If this is not an industrial account, contact Client Services or your supervisor as to what should be entered in this 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. If the patient does not exist in the database, the patient will need to be created.
4. Enter the outside submitter’s case number in the **Ref. Lab No.** field. If the outside submitter’s case number includes letters, do not include the specimen letters in this field.
5. Enter the diagnosis code in the **Code** field and authorizing provider in the **Authorizing provider** field.
6. In the **Bill to:** field: Some industrial accounts will default either **Client** or **Patient** billing. If this field is blank, then determine from the paperwork or from other sources whether this is a Client Bill or Patient Bill.
7. In the **Procedure** field, enter the test being performed. Type part of the procedure name and press Enter to open the Order Search window. When you choose a procedure, the specimen type and priority appear. If the procedure is not listed, you may have to click on the **Facility List** tab to see the full procedure list.



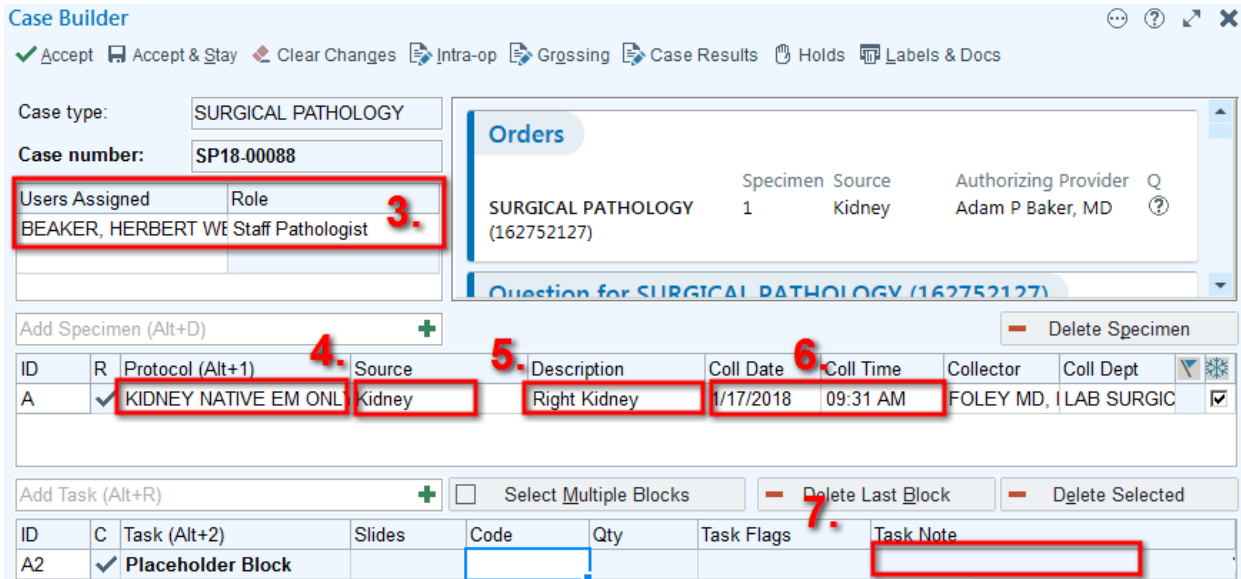
8. In the **# of Spec.** field: The default is 1. Change the number to correspond to what was sent.
9. In the **Priority** field, leave the default as “Routine”.
10. If the procedure has order questions, there will be a question mark under the **Q** column. Click on this question mark icon and answer the appropriate questions.
11. To scan in the paper requisition/orders into Beaker, you can press the **Scan** button.
 - a. Type in a description in the **Description** field.



- b. Load the paper into the scanner, and click the **Acquire** button.
 - c. Once the paper has been scanned, click on the **Save Doc** button.
12. When the Requisition Entry form is filled out, click  **Case Builder** button to begin processing the case. This will bring up a new window.

Create the Kidney EM only case in Case Builder:

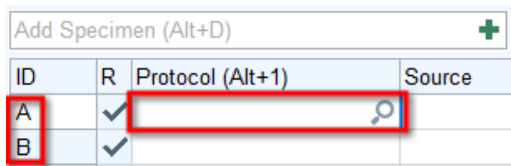
1. Go into **Case Builder** to begin a case. You can enter it from the **Actions** icon-> Case Builder. You can also find Case Builder as a link on your Dashboard or personalize your top menu to add a Case Builder button.
2. Scan in the specimen using the barcode reader. Click the **Accept** button. If this specimen does not have a case assigned previously, it will start a new case. If one exists, then it will open the current case for this specimen.



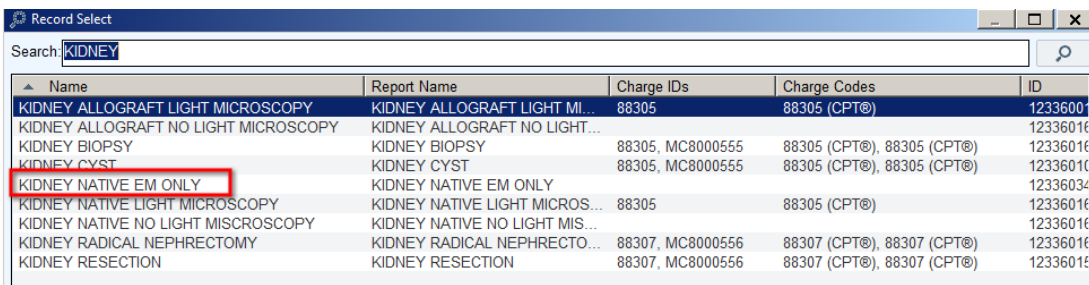
3. At the **User Assigned** and **Role** field, assign the appropriate Staff Pathologist.

Adding Specimens:

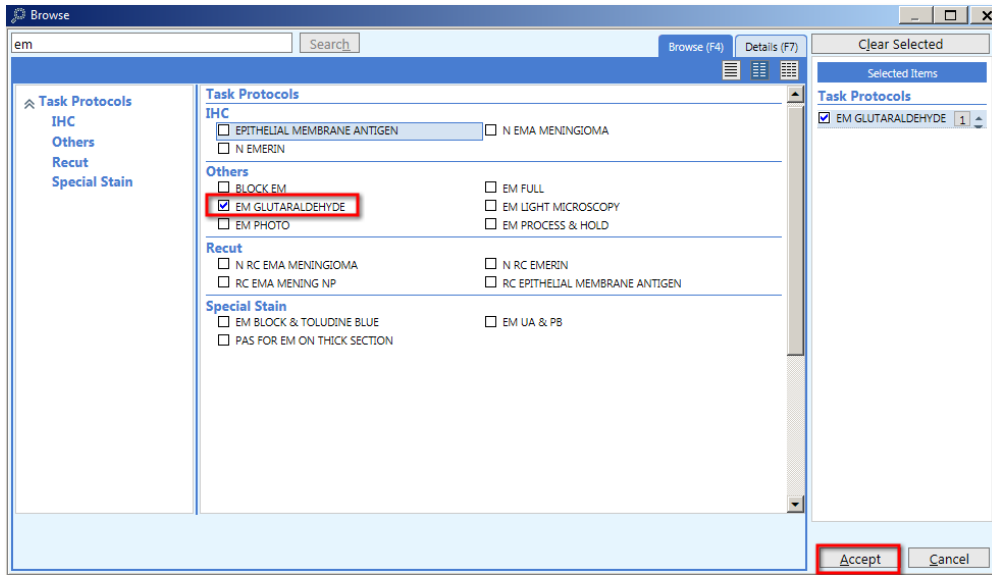
4. Case Builder saves the first row for the specimen you added in Req. Entry. Click in the **Protocol** field directly for the row you want to assign a specimen. Do **not** use the **Add Specimen** field for the first specimen.



- a. In the **Protocol** field for Row A, type in "kidney" and press the magnifying glass. Choose the "KIDNEY NATIVE EM ONLY"



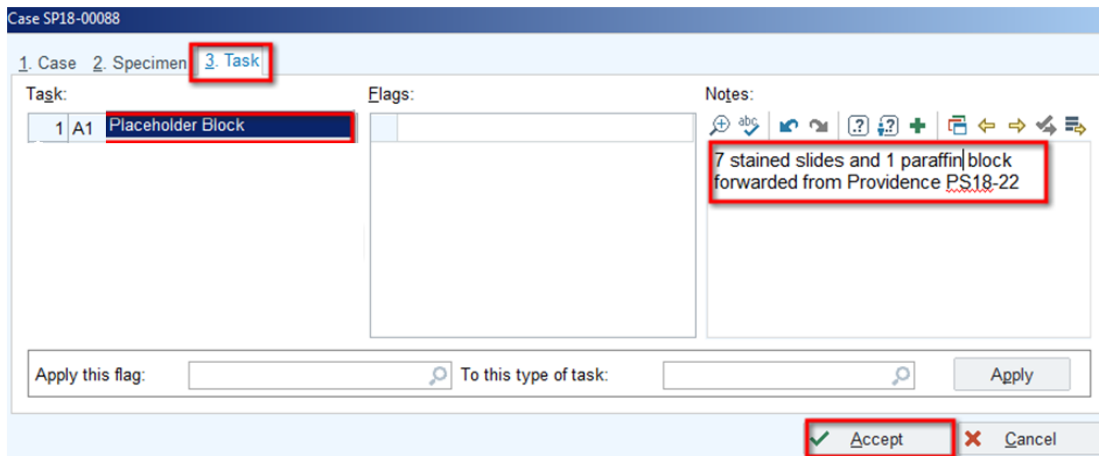
- Type in a **Source** and **Description**. Enter the source information or text comments from the order.
- Complete the collection information in the fields to the right. Enter the **Collection Date** and **Collection Time**. The Collection Time is important because if CP tests are ordered on a case, then CP Beaker requires a Collection Time to be filled out. If you don't know the time, put "n" for current time.
- In the **Add Task** field, type in "em" and press the magnifying glass. Check off "EM GLUTARALDEHYDE" and click on the **Accept** button.



- This will add a Placeholder Block to the Task Protocol list. You need to add a Task Note to that Placeholder. Click on the Task Note field on the row that corresponds to the Placeholder block.

ID	C	Task (Alt+2)	Slides	Code	Qty	Task Flags	Task Note
A1	✓	Placeholder Block					

- It will bring up the **Case Info** window. Make sure the Task tab is selected, and the Placeholder Block is also selected. Type in the note you want to add for that particular task. Click the **Accept** button when you are done.



10. Add another task to the **Add Task** field. Type **"IF FRZ BLK"** and press Enter.

if frz blk				+ <input type="checkbox"/> Select Multiple Blocks		
ID	C	Task (Alt+2)	Slides	Code	Qty	Tas
A1	✓	Placeholder Block				

11. This will enter a **Block IF Frozen** and an **H&E IF** task.




Add Task (Alt+R)				+ <input type="checkbox"/> Select Multiple Blocks		
ID	C	Task (Alt+2)	Slides	Code	Qty	Tas
A1	✓	Placeholder Block				
A2	✓	Block IF Frozen				
A2.1	✓	H&E IF		1		

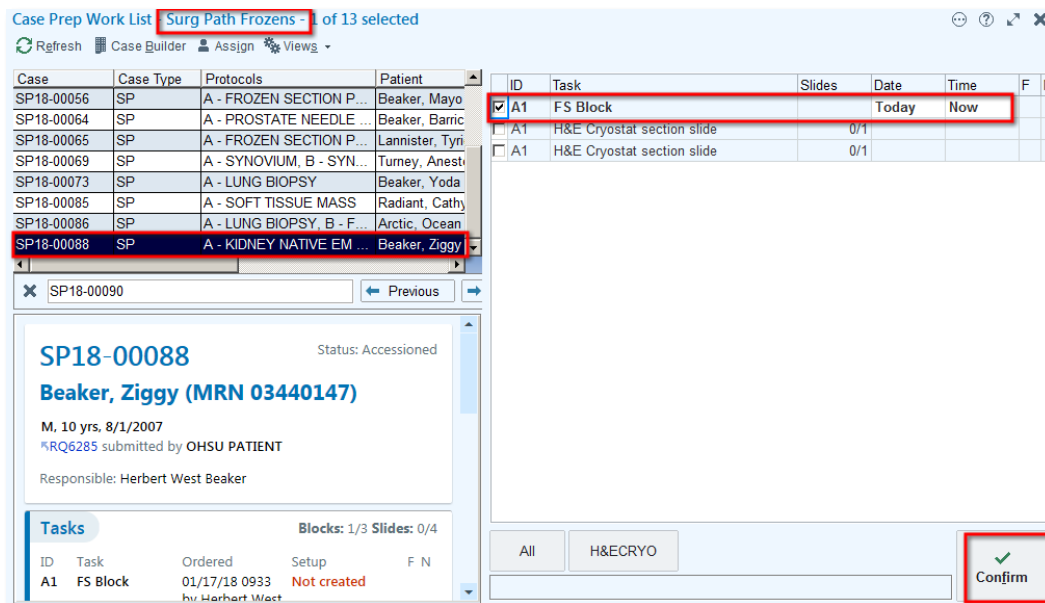
Accessioning the Case:

12. When you are done, click ✓ **Accept** to accession the case. This should print a cassette and two slides and a frozen worksheet.

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.

Case Prep Work List:

- To remove the kidney block from the Case Prep Work List, click the  tab to open the **Case Prep Work List**. You can also find a link to it from your Beaker AP Lab Dashboard. Make sure you are viewing the **Surg Path Frozen** view. To change your view, click on the  **Actions** button and choose  **Views** and pick the view you want.




Case	Case Type	Protocols	Patient	ID	Task	Slides	Date	Time	F
SP18-00056	SP	A - FROZEN SECTION P...	Beaker, Mayo	<input checked="" type="checkbox"/> A1	FS Block		Today	Now	
SP18-00064	SP	A - PROSTATE NEEDLE ...	Beaker, Barric	<input type="checkbox"/> A1	H&E Cryostat section slide	0/1			
SP18-00065	SP	A - FROZEN SECTION P...	Lannister, Tyri	<input type="checkbox"/> A1	H&E Cryostat section slide	0/1			
SP18-00069	SP	A - SYNOVIUM, B - SYN...	Turney, Anest						
SP18-00073	SP	A - LUNG BIOPSY	Beaker, Yoda						
SP18-00085	SP	A - SOFT TISSUE MASS	Radiant, Cathy						
SP18-00086	SP	A - LUNG BIOPSY, B - F...	Arctic, Ocean						
SP18-00088	SP	A - KIDNEY NATIVE EM ...	Beaker, Ziggy						

SP18-00088 Status: Accessioned
Beaker, Ziggy (MRN 03440147)
M, 10 yrs, 8/1/2007
#RQ6285 submitted by OHSU PATIENT
Responsible: Herbert West Beaker

Tasks Blocks: 1/3 Slides: 0/4

ID	Task	Ordered	Setup	F	N
A1	FS Block	01/17/18 0933	Not created		

- Select the case you want to confirm on the left side of the window. The tasks for the selected case appear on the right.
- Check the **FS Block** box on the right side of the window. The current date and time appear by default. If necessary, update the completion date and time to reflect the actual time a task was completed.
- Click  **Confirm**.

Create Kidneys in Formalin cases in Case Builder:

Go into **Case Builder** to begin a case. You can enter it from the **Actions** icon-> Case Builder. You can also find Case Builder as a link on your Dashboard or personalize your top menu to add a Case Builder button.

Scan in the specimen using the barcode reader. Click the **Accept** button. If this specimen does not have a case assigned previously, it will start a new case. If one exists, then it will open the current case for this specimen.

The screenshot shows the Case Builder interface with the following details:

- Case type:** SURGICAL PATHOLOGY
- Case number:** SP18-00092
- Users Assigned:** BEAKER, HERBERT WE (Staff Pathologist)
- Orders:** SURGICAL PATHOLOGY (162752431) 1, Specimen: Kidney, Authorizing Provider: Adam P Baker, MD
- Specimen Table:**

ID	R	Protocol (Alt+1)	Source	Description	Coll Date	Coll Time	Collector	Coll Dept
A	✓	KIDNEY NATIVE LIGHT M	Kidney	Kidney, left	1/17/2018	04:57 PM		
- Task Table:**

ID	C	Task (Alt+2)	Slides	Code	Qty	Task Flags	Task Note
A1	✓	Block Kidney					
A1.1	✓	H&E	1				
A1.2	✓	H&E	1				
A1.3	✓	Jones	1	88313 (CPT®)	1		
A1.4	✓	Jones	1				
A1.5	✓	PAS (Without Digest)	1	88313 (CPT®)	1		
A1.6	✓	PAS (Without Digest)	1				

1. At the **User Assigned** and **Role** field, assign the appropriate Staff Pathologist.

Adding Specimens:

2. Case Builder saves the first row for the specimen you added in Req. Entry. Click in the **Protocol** field directly for the row you want to assign a specimen. Do **not** use the **Add Specimen** field for the first specimen.

The close-up shows the 'Add Specimen (Alt+D)' table with the following structure:

ID	R	Protocol (Alt+1)	Source
A	✓		
B	✓		

a. In the **Protocol** field for Row A, type in “kidney” and press the magnifying glass. If the kidney is in formalin, choose either “**Kidney Allograft Light Microscopy**” or “**Kidney, Native Light Microscopy**” as a specimen protocol.

The 'Record Select' search results for 'kidn' are as follows:

Name	Report Name	Charge IDs
KIDNEY ALLOGRAFT LIGHT MICROSCOPY	KIDNEY ALLOGRAFT LIGHT MI...	88305
KIDNEY ALLOGRAFT NO LIGHT MICROSCOPY	KIDNEY ALLOGRAFT NO LIGHT...	
KIDNEY BIOPSY	KIDNEY BIOPSY	88305, MC8000555
KIDNEY CYST	KIDNEY CYST	88305, MC8000555
KIDNEY NATIVE EM ONLY	KIDNEY NATIVE EM ONLY	
KIDNEY NATIVE LIGHT MICROSCOPY	KIDNEY NATIVE LIGHT MICROS...	88305
KIDNEY NATIVE NO LIGHT MICROSCOPY	KIDNEY NATIVE NO LIGHT MIS...	
KIDNEY RADICAL NEPHRECTOMY	KIDNEY RADICAL NEPHRECTO...	88307, MC8000556
KIDNEY RESECTION	KIDNEY RESECTION	88307, MC8000556

3. Type in a **Source** and **Description**. Enter the source information or text comments from the order.




- 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.
- All the tasks for this specimen protocol should be added by default.

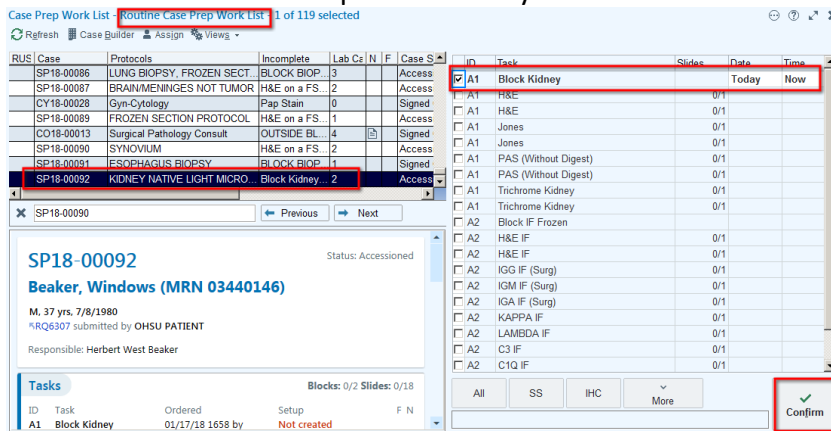
Accessioning the Case:

- When you are done, click **Accept** to accession the case. This should print a cassette and two slides and a frozen worksheet.

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.

Case Prep Work List:

- To remove the kidney block from the Case Prep Work List, click the  tab to open the **Case Prep Work List**. You can also find a link to it from your Beaker AP Lab Dashboard. Make sure you are viewing the **Routine Case Prep Work List** view. To change your view, click on the  **Actions** button and choose  **Views** and pick the view you want.




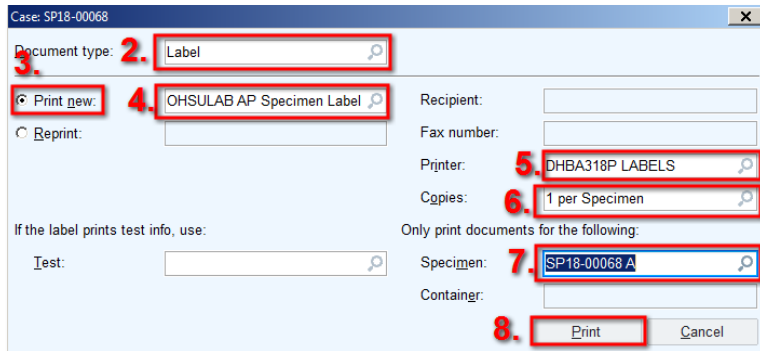
- Select the case you want to confirm on the left side of the window. The tasks for the selected case appear on the right.
- Check the **FS Block** box on the right side of the window. The current date and time appear by default. If necessary, update the completion date and time to reflect the actual time a task was completed.
- Click **Confirm**. If all of the tasks were confirmed for the selected cases, those cases will drop off the **Case Prep Work List**.

Additional Tasks:

Printing out non-frozen specimen labels:

When you check in non-frozen specimens, the Beaker specimen label will not print automatically when you accession the case. To print an AP Specimen label:

1. In Case Builder, click on the  **Actions** button and choose **Labels and Docs**. (Alternatively, you can personalize your Case Builder tool bar to have the Labels and Docs as a button).
2. Select “**Label**” for the Document type:
3. Click on the **Print New** option.
4. Choose “**OHSULAB AP Specimen Label**” by clicking on the magnifying glass next to the Print New Field.
5. Select your workstation printer for the Printer field.
6. Select “**1 per Specimen**” for the Copies field. Note: if you leave it on one per container, you will print a lot of erroneous extra labels!
7. In the Specimen field, choose the specimen you want to print. The settings should look like the following:



Case: SP18-00068

Document type: **2.** Label

3. Print new Reprint

4. OHSULAB AP Specimen Label

Recipient: _____

Fax number: _____

Printer: **5.** DHBA318P LABELS

Copies: **6.** 1 per Specimen

If the label prints test info, use:

Test: _____

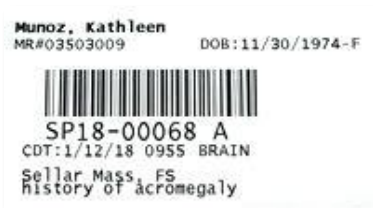
Only print documents for the following:

Specimen: **7.** SP18-00068 A

Container: _____


8.

8. Click the **Print** button. The label should look like this:

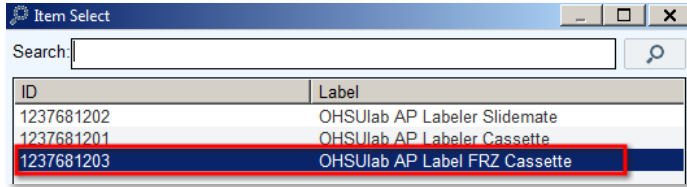


Reprinting Frozen Cassettes:

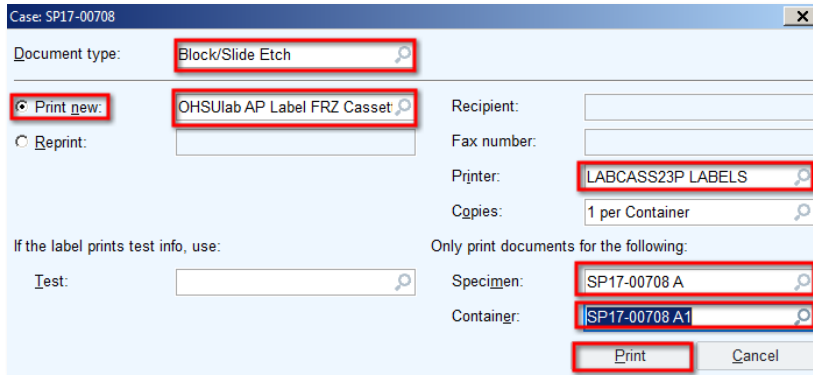
If you have to reprint a frozen specimen cassette:

1. In Case Builder, click on the  **Actions** button and choose **Labels and Docs**. (Alternatively, you can personalize your Case Builder tool bar to have the Labels and Docs as a button).
2. Select “**Block/Slide Etch**” for the Document type.
3. Click on the **Print New** option.

- Choose “OHSUlab AP Label FRZ Cassette” by clicking on the magnifying glass next to the Print New Field.



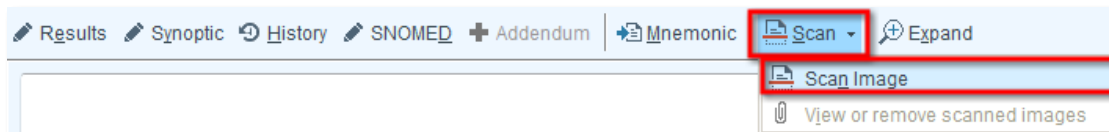
- Select your workstation printer for the Printer field.
- Select “1 per Container” for the Copies field.
- In the Specimen field, choose the specimen you want to print.
- In the Container field, choose the frozen block you are trying to reprint.



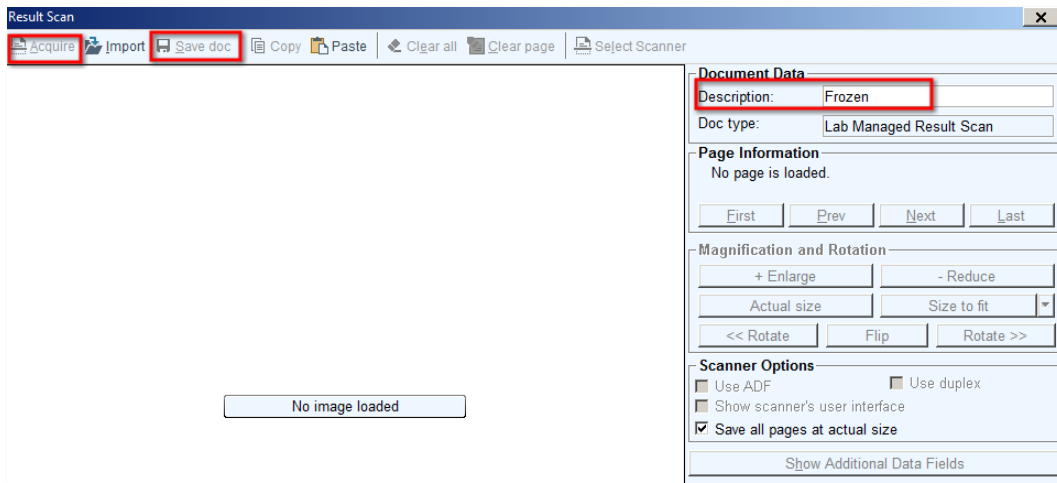
- Press the **Print** button.

Scanning the Frozen Worksheet into Case Results:

- Open the case in 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 some descriptive text in the Description field. Ex. “Frozen”
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.



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