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Created on 31st January 2013  Updated on 16th September 2013
**Patient Registration Process**
*(The follow content was taken from The Children’s Hospital at Westmead, Quickstart PathNet Patient Registration Process document)*

Patient Registration is completed through the **PathNet Registration** conversation.

- Via **Maintain Case** (launched from PathNet Appbar) (Histopathology only)

- From **Maintain Case Access**
  
  Click on the ellipsis to the right of the Patient field. The **PathNet Registration** conversation search window opens.
• The **Person Search** window appears.

![Person Search window](image)

• Enter name as provided on the sample (Last Name, First Name) and click the **Search** button.

• If the entered name matches a patient in the system these patients will be displayed in the top half of the screen.

**Tip:** Additional filters may be applied in your patient search process to limit the potential matches provided. You may include gender and/or date of birth in your search filters.

If you are searching for a person by name, and there is any ambiguity on the form or possible spelling differences, wildcards can be used in the name fields. The * symbol can be used in the place of letters or parts of words. This can be particularly helpful for patients with long first names for surnames. For example, if you were looking for Jack Macpherson, you could type: Macp*, Jack
Review all returned results for matches to your patient.

**Warning!** The following **MUST MATCH** in order to safely reconcile an existing record with your incoming sample:
- Last Name
- First Name
- Date of Birth
- Gender
- Medicare Number OR Address

**Tip:** Make sure you check the MRN column in the Person Search window. If the person that you select has no MRN, they are NOT a patient! Keep looking until you find the correct patient with a MRN.

- If your patient is not found in the search, click on the Add Person button
- A box will pop up that allows you to enter where the specimen came from.
- In the Client Name box enter the first characters of the referral source and click the ellipsis to search.
- Select your Client Name and click OK.
<table>
<thead>
<tr>
<th>Tip:</th>
<th>For Newborn Screening department</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Client Name = NSW Newborn Screening Programme</td>
</tr>
<tr>
<td></td>
<td>• Facility Name = NBS (defaulted)</td>
</tr>
</tbody>
</table>

For staff health patients

|      | • Client Name = Staff - SCHN-W |
|      | • Facility Name = CHW (defaulted) |
|      | • (client code 22222 in Classic) |

For Quality Assurance Programme patients

|      | • Client Name = Quality Assurance Programme |
|      | • Facility Name = CHW (defaulted) |
|      | • (client code 90000 in Classic) |

For internal shared specimens sent from Histopathology to Micro / Cytogenetics

|      | • Client Name = Histo - CHW Laboratory |
|      | • Facility Name = CHW (defaulted) |
|      | • (client code 88888 in Classic) |

For all other departments and patients

|      | • Client Name = <Referral Source Name> |
|      | • Facility Name = CHW (defaulted) |

Referral source will typically be another hospital or a pathology laboratory.

Other useful referral sources include:

|      | • Referring Doctor (client code 77777 in Classic) |
|      | • Other Referring Hospital (client code 55555 in Classic) |
|      | • Other Private Laboratory (client code 66666 in Classic) |
|      | • <Named Research studies> (search for study by name) |
The registration screen will open.

**Tip:** Information you enter in the search filters will carry forward into the registration screen.

Using the data provided on your request form, complete all fields in the top half of the conversation window. **Yellow fields** are mandatory.

**Tip:** If none of the fields are highlighted yellow, right-click anywhere on the screen to display a small menu.

Click on **Highlight Required Fields** so that there is a tick next to it. All required fields will now turn yellow.

- Complete all fields on the main screen and in the Lab Visit and Next of Kin tabs.
- Always choose the Next of Kin’s relationship to patient before completing the search for Next of Kin.
**Information:** Fields available and default values will flex based on information entered.

- See below for additional information about completing address and provider selection fields

**Warning!** The MRN field will be system assigned for most patients.
- Exceptions are Sydney Children’s Hospital and NSW Newborn Screening Programme. When creating new records for patients referred from these locations, enter the MRN provided into the MRN field.
- For all other referrals, use the External Reference Number field to record the patient identifier provided by the referrer.

- If your patient is found in the search, click on the patient row in the top half of the screen.
- The visits or encounters for the selected patient will display in the bottom half of the screen.
- Review all returned visits for matches to your sample. With the exception of shared specimens, in most instances there will not be a visit that matches your sample date.
- If your visit is not found in the search click on the **Add Encounter** button.

**Information:** Any demographic information recorded on previous visits or samples for your patient will already be defaulted. Update details where needed.

- Using the data provided on your request form, complete all fields in the top half of the conversation window.
- Complete all fields on the main screen and in the Lab Visit and Next of Kin tabs.
- Always choose the Next of Kin's relationship to patient before completing the search for Next of Kin.
- See below for additional information about completing address and provider selection fields

**Warning!** Always record the details as provided on the referred request form when registering patients and placing orders.

Recording the correct client, Medicare Number, provider / provider number and financial class are critical to ensuring the following:
- Patient result chart is sent to the correct recipient
- Patient results can be viewed in PowerChart by those authorised to do so
- Billing and correct reimbursement is applied i.e. you get paid for the work you do
Entering Address details in PathNet Registration

When completing patient details in registration for PathNet, there are two types of addresses:

1. **Residential Address:** the address of the patient's home.
2. **Mailing Address:** the address to where all correspondence gets sent (if needed). This is also where overseas addresses are captured.

In addition, there are address categories that help streamline address entry into the system. The main ones applicable to lab are:

1. **QAS**
   - **Quick Address System** – this setting is used for entering all Australian addresses. The Address Help button must be used to search and enter the address. This function ensures accurate address details are recorded.
2. **International**
   - Selecting International will automatically complete all address fields to accommodate to the standard entry of an overseas address, leaving the Country field active so that the correct country of origin can be selected.
3. **TBA – ED/ICU/Path Only**
   - Selecting this category automatically completes all fields to “NFIA” (no further information available) to accommodate for situations when the address is not yet known or not provided (to be used by Pathology, Emergency and ICU staff only).

Using the Quick Address System (QAS) address type

- Ensure QAS is selected in the Address Category field.

- Click on the Address Help button. The QAS Application window will appear.

- Ensure the Single Line button is selected.
  (For further detail on setting search defaults for QAS, see the end of this quickstart.)

- Click in the Enter Search field and enter one or more address elements ([street number and name], [suburb]) separated by commas. For example; Unit 3, 34 Windermere Ave, Northmead.
As a rule, you will usually only have to type the unit and/or building number, street name and suburb to have success and the system will find the postcode for you.

**Tip:** The Single Line method of searching allows you to use **wildcards**. This is where missing characters are substituted with an asterisk [*] (replacing any number of characters) or question mark [?] (replacing a single character).

Eg: Green* will find Greener, Greenway, Greensleeves
Green? will find Greens, Greene, Green

- Click the **Search** button to begin the search.
- If multiple results for the search are returned, you will see a list of possible matches (as shown below). [Alternatively, if there is only one match, skip this step and move to the next point].

  Click on the correct item then click on the **Select** button.

**Information:** If your search results reveal that the address is within a unit complex, a plus sign will appear next to the address result. Click on the plus sign to drill down and display a full listing of all units.
Click on the **Accept** button.

The address fields are populated in the conversation window.

**Warning!** Do not enter any details within the three blank rows beneath the first address row as these details will not appear in the conversation window, nor will they be printed. If there are additional details required in the address, type these directly in the **first row**.

### Entering names of departments or facilities

Use QAS to provide the core address details and then edit the street address field to accommodate any additional information.

**Example 1: Entering the address of a Community Service Centre (formerly DoCS/FaCS)**

(This is demonstrated using the following example of entering the address of Bankstown Community Service Centre.)

NOTE: a link to the listing of CSC addresses is accessible via the CHW Intranet homepage – Quick Links\Child Protection\CSC Addresses:

http://www.community.nsw.gov.au/docs_menu/about_us/contact_us/community_services_centres.html

- Ensure QAS is selected in the **Address Category** field.
- Click on the **Address Help** button.
- Type the street or PO Box, Suburb, and/or State.
- Click on the **Search** button. If a list of addresses appears, select the required address and click **Select**.
When the following screen appears, click in front of the address in the first line of the address field and type the Community Service Centre name, using the format of:

\[c/o \{office name\} CSC, \{office address\}\]

- Click on the Accept button. (Note: The Mailing Address for a Community Service Centre is likely to be a PO Box.)

**Tip:**

The Back button on the QAS toolbar is handy if you incorrectly selected an address element and wish to go back a step.

The New Search button allows you to clear all fields and enter a new address.

**Example 2: Entering the address which has a facility or property name**

- Follow the same procedure as above, however on the final screen, click in front of the address in the first line of the address field and type the facility name:

Overseas patients and their families

- Ensure International is selected in the Address Category field.
  - The Street Address, Suburb/Town, State and Postcode fields automatically populate to “Overseas”.
  - Select the country from the Country drop-down list.
  - Enter Mailing Address for Overseas patients

Use these fields for recording the address provided for any patients referred from overseas.

- No Address Help is available for overseas addresses. These need to be manually entered.

**Unknown addresses**

In the Pathology, Emergency Department and ICU there will be situations where the patient address is not provided.
Ensure TBA – ED/ICU/Path Only is selected in the Address Category field.

**Setting Search Defaults for Address Help**
The QAS system has two options for address searches; the **Typedown method** and **Single Line method**.

- The **Typedown** method allows you to search for an address by firstly postcode or suburb followed by street name and building number. To search using Typedown, you must start with the most general address information (postcode, town or country) and work through to the most specific (street number).

- The **Single Line** method is the preferred method for entering standard street addresses (street number and street name, suburb) and has the additional functionality of allowing you to search for incomplete addresses, where only partial information is provided or spelling is inaccurate.

**Informatio n:** When you use QAS for the first time, you will notice it defaults to the Typedown option. If you change it from Typedown to Single Line, it remains that way until you change it again.

- To change from Typedown to Single Line, from the toolbar on the QAS Application window, click on the **Single Line** icon.

**How to search for and select a provider**

In the **Attending Doctor** field, start entering Last Name, First Name for your referring provider.

If an exact match is found, it will be returned for you.

If more than one match is found, click on the Binoculars button to search.

From the returned results, select the provider that has a match for the provider name and provider number given on the referral

**Tip:** You can search by direct entry of the provider number. To do this:

- Without entering a name, click on the Binoculars button to search
- Enter the Provider Number in the Alias field
- Click Search

- If you are unable to find your provider, choose NOT, Listed and enter the details you have for that provider in the fields presented.

| Information | Currently when you are unable to find a provider in Classic, details are faxed through to the eMR Unit for adding. This fax process will no longer be needed. An audit report will be created to report this information. |

---

**Laboratory Specific registration notes**

**Recording date of birth when not provided**

- If the date of birth is unknown, and you have a patient in front of you, an estimated date of birth should be collected
  - Use 01 for day and 01 for month and estimate year of birth according to the person’s approximate age.
  - Enter “yes” in the Estimated Date of Birth field.
- If the date of birth is unknown, and you don’t have a patient in front of you, enter 01/01/1900
  - Enter “yes” in the Estimated Date of Birth field.

**Recording Staff Health Name and MRN**

- Last Name = 1st two letters Surname concatenated with 1st two letters First Name
- First Name = Ref No value provided on form
- MRN = Ref No value provided on form
**Appbar**

Left to right

1. AppBar Icon
2. Maintain Case
3. Processing Task Order Entry
4. Worklist and Labels
5. Inventory Management
6. Outstanding Tasks

Space

7. Case Log
8. Case List

**NOTE:** Case List contains three additional icons, Case Findings, Case Status and Pathology History Inquiry. Any one of these can be loaded onto users AppBar depending on personal preference.
Overview of Patient Demographics:

**Viewing Case Demographics**
In many of the PathNet AP applications Demographic icons are available on the application toolbar. They are used to view either Case or Patient Demographics.

Case demographics can be accessed by clicking on the Case Demographics icon. The case demographics display the Collected and Received date and time, the Pathologist assigned to the case and the person that accessioned the case. Specific Case Demographics details can be viewed by selecting the appropriate tabs listed below:

- Reports
- Specimens
- Physicians
- Outside Case Numbers
Viewing Patient Demographics

Patient Demographics can be accessed by clicking patient demographic icon.

A brief demographic summary displays with following four tabs:

- Person tab
- Encounter tab
- Encounter Personnel tab
- Encounter History tab
Maintain Case

Overview of Maintain Case

Maintain Case is used to accession AP cases into the system, generating cases numbers with case specific information added. This information can be updated using application.

Information that is recorded during the accessioning process includes specimen descriptions, the submitting physician, priority, specimen fixatives, specimen adequacy and assigned pathologist and resident.

Customization Options

Maintain Case has some user preference options outlined in the screen shots below. The customizations will be dependent on the task is most often performed when using Maintain Case.

To access the customize function click on View on the Menu bar and select Customize in the drop down menu.

End-users who accession cases into AP will have the Login Specimens or New Case customized to open automatically when Maintain Case is launched, depending on the Accessioning process used.

End-users who need to open existing cases within Maintain Case Select Case can be selected to open automatically.

The Specimen Label printer can be defaulted to the specific printer used at your facility by selecting the Label Print Setup in the Task Menu. Check the Save as default box to always have the Specimen Labels print at the selected printer.
Log in Specimens
The Log-in Specimens dialog box allows you to log pathology cases into the AP department or add specimens to an existing pathology case.

Select either the By accession or the By patient option; use By Accession if the specimen has a readable bar code; or use By Patient if there is no accession number or barcode.

By Accession ordering:
1. In the By accession: field enter a valid Julian accession number or use the barcode reader.
2. Press TAB to the By Prefix field or Alt B.
3. Select a prefix from the list to designate that the case number will be automatically assigned by the system.
   Note: Ensure the correct prefix is selected for the specimen. The prefix selection designates the final report loaded for the case and the routing.
4. Click OK to cause the selected specimens to be applied to the main application in a “new order” mode.
5. An Open Case dialog box will open if the patient has an unverified case in the system. See Checking for Open Case section below.

By Patient entry:
1. Click on the ellipsis button, Search by patient's Medical Record Number listed on the Collection Label.
2. Select your patient’s name, and the appropriate encounter.
3. Click OK. The system defaults to all specimens initially. Look at the specimens displayed and deselect the specimens that are not wanted.
4. To adjust the order of the specimens, highlight the specimen that you want to move and click on the Move Up or Move Down buttons until you have that specimen in the desired location.
   Note: The sequence of specimens is important in that this sequence will be used by the Maintain Case application when the specimen ID scheme is automatically applied.
5. Select the appropriate prefix and press enter.
Checking for Open Cases

The Open Cases dialog box provides notification an open case already exists for the patient. The concept of an “open case” for the purposes of this method of duplicate checking includes the following criteria:

- All encounters for the person are evaluated.

- Open pathology cases are those cases for which the primary report has not yet been verified, and where the “case type” value for the prefix selected is the same as that of the open cases.

If open cases are found for the patient, The Open Cases dialog box displays. The system defaults to the last open case.

- If the current case being accessioned belongs to the open case, you must click Yes to add it to the open case that is highlighted.

- Click No if you do not want to add it to an existing case.
Adding/Modifying Specimens
The Add/Modify Specimen dialog boxes allow you to document specimen-specific fields. Each specimen to be associated with a case must be entered through the Add Specimen dialog box and can be updated through the Modify Specimens dialog box.

When logging specimens, the Specimen description carries forward from DOE or PowerChart. The Source needs to be filled in. Double click on the Source cell; this will open the Modify Specimen dialog box.

To continue modifying your specimen, follow the steps below:

1. Select a source for the specimen that was submitted for the case from the list (Required). Clicking the ellipsis opens the Specimen dialog box, allowing you to query your entire specimen list by code or description.
2. Accept the default that is carried forward from DOE or PowerChart. This is a free text field, if required the description can be changed.
3. The collection date and time for the specimen carries forward from DOE or PowerChart. Accept this, or make changes as necessary. You may click on the beside the date to open a calendar and click on a date to select it. Click on the to move the time up or down, or you can type in a time.
4. Click OK, Apply, Cancel, or Comment. **OK** causes the specimen to be applied to the spreadsheet and the Add dialog box to close. **Apply** causes the specimen to be applied to the spreadsheet and the Add dialog box to remain open. **Cancel** closes the Add dialog box without applying any changes to the spreadsheet. **Comment** causes the Comments dialog box to open.

Complete the following steps to add additional specimens:

1. From the Specimen tab on the main window, click the **Add** button. The Add Specimen dialog box opens with the information that was previously displayed.
2. Enter needed information for the new specimen (Steps 1-4)
Navigating in Maintain Case

In addition to displaying patient demographics and all the specimens that have been created for a case, the main application window includes information regarding the case such as, Case priority, Pathologist responsibility, and additional “Copy to:” physicians.

The main window has three tabs. The Specimens tab displays information regarding the specimens submitted for the case. The Reports tab displays information regarding the reports associated with the case. The Outside Case Numbers tab allows outside consults with a case number generated by the referral hospital to be cross referenced to our NH cases.

To navigate through the main window, follow the steps below:

1. Click on the Specimens or Reports tab to add/modify specimen or report information. Click on the Outside Case Numbers tab to add/modify outside case number details.
2. Select a priority to assign to the case, Routine or ASAP. If a priority value was assigned to a specimen, this field defaults to that value automatically. Priority will carry forward from DOE or PowerChart.
3. Physician carries forward from DOE or PowerChart.
4. Select a pathologist to assign case responsibility to a pathologist. After the first case this will default for subsequent cases and has to be changed when appropriate.
5. Select a resident to assign case responsibility to a resident. Facilities with Staff that Gross dictate need to have their name selected in this field.
6. Copy To information carries forward from DOE or PowerChart. If additional physicians need to be added, click the ellipsis button and add physicians in the Copy To: dialog box.
NOTE: When adding Physicians the name must be added to the Selected: field to add the selection to the case.

7. Press Ctrl S, or click the icon to save any changes made to the Maintain Case window.

Printing Specimen Labels
In the Maintain Case window, make sure that the Print specimen labels checkbox is checked. The system will print specimen labels automatically once you have submitted the case.
New Case

An alternative process for accessioning cases into Anatomic Pathology is to use the New Case function. This can be accessed by clicking on the New Case icon or by customizing to open automatically when Maintain Case is launched. Many of the windows that open during the accessioning process are the same or similar windows that open when using Log-in Specimens.

Once the New Case dialog box is opened follow the listed steps below:

1. Click the Ellipsis button next to the Patient: field. An encounter search window opens.

2. Enter the encounter number for the Person, when the search is complete highlight the correct encounter type listed for the person and press Enter.

3. Select the appropriate site code prefix for the case in the By prefix: field and press Enter.

4. If an open case exists for the patient the Open Case window will popup, select Yes if the current case needs to be added to the open case; No if this is a new case for the patient.

5. The Add Specimen dialog box opens, select the correct Source from the drop down and adjust the Description as required.

6. Tab to the Collected: field and enter the appropriate collected Date and Time.

   Note: The date can be selected by utilizing the up/down arrows, when the cursor is in the Date field, press the down arrow to open the calendar and use the right/left arrows to select the correct date.

7. Select specimen adequacies and fixatives as appropriate for the case.

8. Click Apply if additional specimens need to be added to the case. Complete the data entry for each specimen as required.

9. When all specimens are added press Enter or click OK.

10. The Prompt window opens, enter the Clinical Information contained on the Requisition as per your facilities processes. Click Save when entry is complete.

11. Alt + C to the Physician field and enter the ordering Physician name.

12. Tab to the Pathologist field and enter the appropriate Pathologist name. This information will carry forward to the next case.

13. Alt + Y to the Copy To: field and click the Ellipsis to add additional physicians to the case.
Selecting Cases
The Select Case dialog box allows you to identify the pathology case for which information will be added or modified.

To select a case, follow the steps below:

1. From the Task menu, choose Select Case, or click the Select Case Icon
2. Enter the case accession number in the Case box.

Note: The dialog box requires that the user identify the case by a case number. It also offers the ability to access the Case Help dialog box if the actual case number is not known by clicking the ellipsis button.

3. Click OK to close the Select Case dialog box and return to the main window.
4. Once a case has been selected, modifications to specimens and reports can be made.

Modifying Reports
Modify report provides you with a mechanism to modify report Pathologist responsibility, and routing.

To modify reports, follow the steps below:

1. Select a report from the Report tab.
2. Click Modify. The Modify Report dialog box displays.
3. Make your modifications to the report.
4. Click OK to apply the changes to the case and close the dialog box.
Cancelling Reports
The ability to cancel a report is dependent on report status once a report has neared completion it cannot be cancelled. Reports that are currently being edited by another user are dithered (grayed out) to prevent cancellation. To cancel reports:

1. In the main window in Maintain Case, click the Report Tab.
2. Highlight the report that is being cancelled.
3. Click Cancel.
4. Select the appropriate Cancel Reason from the dropdown menu and Click OK.
5. Click the Save icon to save the changes made to the case.

Cancelling Specimens
Cancelling specimens associated with a case can be accomplished in Maintain Case. Cancelling a specimen in a case will not cancel anything other than the single specimen identified. You cannot cancel specimens after processing tasks have been verified. To cancel specimens, follow the steps below:

1. In the main window of Maintain Case, highlight the specimen.
2. Click Cancel. The Cancel dialog box opens.
3. Select the appropriate Cancel Reason from the drop down menu.
4. Click OK.

Note: When a specimen is cancelled the Specimen ID cannot be reused for another specimen in the case. The Specimen ID will only renumber the specimens if a specimen is cancelled prior to the case being saved.
**Cancelling an Entire Case**
Cancelling a case will cancel all associated specimen reports and processing tasks. To cancel an entire case:

1. Go to task menu and choose cancel case, or click on the icon.
2. Enter the appropriate Cancel Reason from the drop down list.
3. Click OK.

**Label Reprint and Manual Expedite**
The following additional functions can be accessed via the Task Menu dropdown.

- Label Reprint to reprint Specimen Labels, in the Reprint Labels dialog box select the appropriate Specimen label printer and the specimens.
- Manual Expedite to expedite reports. This function is dithered until the case has dictation transcribed into the report. The options for expedite include:
  - Print to Options typically this will be the fax device listed for the physician designated with an X- in front to the physician name or Z-Adhoc to enter the fax number manually.
  - Chart format: Anatomic Pathology and Anatomic Pathology with History.
  - Print Time option of print now and Print upon Verification/authentication which would also have Cumulative selected.
Outside Case Numbers

Outside case numbers generated by a referral hospital can be added as a cross reference to NH cases. The Outside case number is also a demographic value that can be added to the customizable demographics. This will indicate which NH cases have outside consult case numbers associated to them. The Outside Case number details can then be reviewed by accessing the Case Demographics icon located in the AP applications.

To add outside case numbers

1. Select the Outside Case Number Tab
2. Select Add and enter the appropriate information for the case number in the **External Accession** window.
3. Select OK entries are complete.

Previously entered Outside case number Collection Date/Time and Comments can be modified by selecting Modify.

To remove Outside Cases highlight the row and select **Remove**
Case Help using Outside Case Numbers

The Outside Case Number can be used to perform a case search in AP applications.

In the example below the ellipsis is selected to open the Case Help window.

Select the Outside Case Number radio button and enter the number in the field and press Enter.

The NH case connected to the Outside Case number returns for the search.
Managing Comments

Overview of Managing Comments

Comments can be added to Pathology cases to provide additional communication and documentation within Pathology. Comments are used at the case level or order level. There are different types of pathology comments used:

- Case comments
- Order comments
- Specimen comments

You can add, modify, or view comments to specimens and reports in Maintain Case. Order comments can be added in Processing Task Order Entry. Report Order Comments can be added in Transcription. All functions are performed in a similar manner. Detailed steps for adding and editing comments are given below.

Adding Comments

Adding Comments in Maintain Case can be done either of two ways. In the Add Specimen or Report Modify dialog boxes the Comment button can be clicked to open the Comment dialog box. Clicking View in the Menu bar > Comments and selecting the comment type is the alternative method for adding comments.

In Processing Task Order Entry the comment dialog box is accessed by double clicking the comment cell in the main window spreadsheet or by going to View in the menu bar.

In Transcription the comment dialog box is accessed via the menu bar as described above.

Once the Comment dialog box is open in any of the described applications follow the remaining steps listed below.

1. Click **Add**. The Add Comment dialog box opens.
2. Enter the desired comment.
3. Click **OK** close the Add Comment dialog box.
4. Click **Close** to return to the application window.
5. A comment icon will display for the Order or Case that is viewed in other applications.

Specimen comments are only viewed in Maintain case and Case Status.

Order Comments relate to specimens or reports. Specimen Order comments are viewed in Maintain case, Processing Task Order Entry, and Outstanding Tasks, and pertain to processing tasks. Report order comments are seen in the Resulting applications. Case Comments are viewed throughout every application.
Processing Task Order Entry

Overview of Processing Task Order Entry
The Processing Order Entry application offers you the ability to associate processing tasks to a specific case, specimen, block, or slide. Individual tasks or group tasks can be used during the ordering conversation.

Selecting the Queue
Select Queue provides a mechanism to view all tasks proposed by a specific service resource, pathologist, or resident.

The Select Queue dialog box allows you to specify the qualifying criteria for cases to display in the Queue tab. Queue selection options include system and manual. System is automatically defaulted.

Complete the following steps from the System mode to select a queue:

1. Select the service resource to view cases that have tasks proposed. (Optional)
2. The Batch option is set to zero.
3. Select the responsible pathologist to whom pathology cases are to be included from the list. (Recommended)
4. Select the resident for which the pathology case is to be included in the queue. (Optional)
5. Click OK to close the dialog box, initiate the queue list qualification search, and display the Queue tab in the main window.

Note: Once tasks are assigned to cases, those cases will no longer display in the queue. To access a case to add/modify tasks enter the individual case number in the Case: field.
Proposed Tasks

Proposed tasks are tasks that are automatically assigned to specimens. These tasks need to be reviewed; changes made by adding or deleting tasks; and then submitted. Submit proposed tasks by clicking the icon or clicking Ctrl + S.

Adding Tasks

Processing tasks are entered using the Add Task dialog box. From the Add dialog box, order requests are applied to the orders spreadsheet.

To add processing tasks, follow the steps below:
1. From the main window, click Add.
2. Select the processing tasks or groups to be ordered by entering it in the Task field. You may click the ellipsis button for assistance in selecting a task.
3. If adding tasks on a specific block, that block must be selected. To select the appropriate specimen, block, or slide, click the field and select an option or enter the appropriate data in the box.
4. Select the Priority from the list or accept the default.
5. Select the Resource from the list if appropriate.
6. Click OK or Apply. OK causes the tasks entered to be carried forward to the main application, and closes the Add dialog box. Apply causes the tasks to be carried forward to the main application and keeps the Add dialog open.

Note: Processing groups have (*) in front and contain multiple tasks that go together. Refer to the appendix for a complete list of available processing tasks.
Modifying Tasks
To modify processing or group tasks, follow the steps below:

1. From the main window, click on the processing or group tasks that you wish to modify. You can modify information directly on the spreadsheet if you prefer.

Note: If you select multiple rows for modification, the common components in those rows will be carried forward to the Modify dialog box, eliminating the need to modify every field in every row every time.

2. Click Modify. The modify dialog box will open.

3. Modify the necessary information under both the Block and the Slide tab. Do this by double-clicking in the appropriate cell, and then enter the modified information.

Note: If you double click in the Fixative column on the Block tab, a list displays by which you can modify information.

4. Modify the Priority from the list or accept the default if one is presented if appropriate.
5. Modify the Resource from the list if appropriate.
6. Click OK. Clicking OK causes the modified task to be carried forward to the main application and closes the Modify dialog box.

Cancelling Tasks
It is favourable to cancel tasks before they are submitted. Cancelling tasks while they are in proposed or new status deletes the tasks without a cancel reason being required.

To cancel processing or group tasks that are verified, follow the steps below:

1. From the main window, click on the task that you wish to cancel. If multiply tasks are being cancelled highlight the appropriate rows.
2. Click.
3. Select a reason from the list.
4. Click OK to return to the main application. The Task status is updated immediately.

Note: If you select a task that is part of a group, a prompt will open notifying you that all associated tasks will be deleted as well. Click OK.

Note: If you select multiple rows for cancellation, all rows selected and their subordinate rows will be cancelled.
**Order Comments**  
Order Comments can be added to Cases in the Processing Task Order Entry application.

Before the processing tasks orders are submitted, double click in the comment column for the specimen that you want to add the comment to. Click on the Edit button, type in the comment, and click **OK**. Order comments will display in Detail worklists.
Worklists and Labels

Overview of Worklists and Labels
Worklists and Labels is an application that provides you with a mechanism to print a worklist of processing tasks in either a summary or detail form, and to print slide labels.

Worklists and labels are printed for service resource and/or individual tasks. The system assigns a batch number to processing tasks included on a worklist when a list is printed for the first time. Batch numbers allow you to determine what has or has not already been printed on a previous worklist.

Selecting Worklists and Labels
The Select dialog box allows you to filter the cases and tasks that will be printed on a worklist (or labels) in the Worklists and Labels application.

To print worklists and labels, follow the steps below:

1. When you open Worklists and labels, the Select dialog box is customized to open. If it doesn’t, Click on the icon, and the Select dialog box will open.
2. Enter a service resource to specify your grouping. Click the ellipsis to select from a list of valid values.
3. Enter a task in the Task box to specify a specific processing task. Click the ellipsis to select from a list of valid values. (Optional)
4. Select the All Cases option to designate all cases within the service resource or the Selected Cases option to narrow the designation. Enter the beginning and ending accession number range If using the Selected Cases option.
5. Select the Verified or Not Verified checkbox and Click OK.

Consolidating Batches
The Consolidate Batches dialog box allows a user to consolidate two batches into a single batch.

To consolidate batches, follow the steps below:

1. Go to Task -> Consolidate Batch. Enter the “from” batch number numeric value in the From box. All tasks currently assigned to the “from” batch number will be updated to be associated with the “into” batch number value.
2. Enter the “into” batch number numeric value in the Into box.
3. Click OK. Clicking OK causes the system to update all tasks currently assigned to the “from” batch number value with the “to” batch number value, and causes the Consolidate Batches dialog box to close.

Note: Both the “From” number and the “Into” number must currently exist in the Processing Tasks table.
Assigning Batches
The Unassign Batch dialog box allows a user to update all tasks currently associated with a batch to an “unassigned” status.

To unassign batches, follow the steps below:

1. From the task menu choose Unassign Batch, the Unassign Batch dialog box will open.

2. Enter the batch number in the Batch box.

3. Click OK to cause the tasks assigned to the batch number entered to be updated to an “unassigned” status, and causes the dialog box to close.
Case Log

Overview of Case Log
Case Log generates a report that lists cases based upon the selected criteria; in general this includes the case accession number, the specimen source and descriptions and limited patient demographics. The Case Log report can be built to print as a daily report.

Generating a Case Log
1. Select the Date tab.
2. Select a date type from the list.
3. Select a date range by selecting the between option or during the previous day, week, or month options using the spin-button controls.
4. Select the Prefix/Group tab.
5. Select the accession prefixes to include in the case log from the From Available box. Click Move. This action places the accession prefix in the To Selected box.
6. Select the Properties tab.
7. Select the Sort by Accession or Name option.
8. Select a printer from the list.
9. Enter the number of copies in the Copies box.
10. Click OK.
Outstanding Tasks

Overview of Outstanding Tasks
Outstanding Tasks provides the ability to view all outstanding processing activity for a specific service resource or resource group, and the option to verify (complete) any processing tasks that are currently in a status of not verified.

Customization Options
User preferences can be selected to default the Service Resource and/or Tasks that will display in the main application window. The columns and the order that they display in the main window spreadsheet can also be customized.

General
A specific Resource and/or Task can be selected to default when Outstanding Tasks is launched. The Task list that displays in the main application spreadsheet can include gridlines as a user preference.

Display
The following screenshot is an example a main application spreadsheet column customization
Selecting Tasks
The Select Tasks dialog provides the user with the mechanism to filter all outstanding processing tasks according to the specific Service Resource or Resource group they are assigned to.

Complete the following steps to select tasks:

1. In the Resource field specify the service resource or resource group to use as a filter for outstanding processing tasks. Or Click the ellipsis button to open the Test Site Lookup dialog box and select the service resource from the list. Press Enter to close the Test Site Lookup box.
2. In the Task box a specific processing task can be selected as a filter. The default for this is set to (ALL) and in most cases is not changed. Enter the specific Task or click the ellipsis button will open Task Help dialog box. Once the Task is selected, press Enter to close the Task Help box.
3. In the Batch box a worklist batch number can be selected as a filter.
4. Click OK.

A list of cases with outstanding tasks displays.

Verifying Tasks
To verify tasks in the Outstanding Processing Tasks application, follow the steps below:

1. Click on tasks to be verified.

To verify multiple tasks that are in succession in the list, click on the first one that you want to verify, hold down the shift key on the keyboard, and click on the last one in the group.

If desired holding the Ctrl key and clicking specific rows to highlight multiples rows that are not in sequence.

2. Click Ctrl +V or click on the icon. The Verify Tasks popup opens.

3. Click OK. The highlighted tasks are now verified.
Case List

Overview of Case List
Use Case List to view a listing of Anatomic Pathology cases based on user-selected criteria. The purpose of Case List is to provide you with a common starting point for obtaining more detailed case information. Once the desired case is identified in the list, additional, more specific, inquiries can be launched.

Searching for Cases
Complete the following steps to search for cases:

1. Select Case Search from the Task menu, or click on the icon. The Case Search dialog box opens.
2. From the Case Search dialog box, select only the criteria by which you want to search by. The fields to the right of the criteria list are specific to the option selected.

Note: When the user selects an entry from the control presented in the frame, the Add button immediately below the selection frame becomes enabled. Once an entry has populated the List Box, it can be selected for removal or updated.

3. If you select Name, enter the name in the Name field. To enable Soundex search capabilities, click the Soundex search box. Click Add.
4. If you select Prefix, choose a prefix from the drop-down list. Only one prefix can be select for the case list. Click Add.
5. If you select Prefix Group, choose a prefix group from the drop-down list. Click Add.
6. If you select Responsibility, enter or choose a pathologist or resident from the drop-down list. Click Add.
7. If you select Physician, enter or choose a physician from the drop-down list. Click Add.
8. If you select Date, enter or select a date type from the drop-down list. Choose your date options appropriate for the case list.
9. If you select Specimen, enter or choose a specimen from the drop-down list. The specimen codes displayed are based upon the prefix previously selected. Click Add.
10. If you select Institution, enter or choose an institution from the drop-down list. Security options are present so that the user is restricted from selecting any institution values which the user does not have security to access. Click Add.
11. Once you have selected the criteria for the search, click OK. A list of qualifying cases will display.
Forwarding Cases
After the search has been initiated, and qualifying cases have been found, a case list displays.

The sequence of the cases is presented in a spreadsheet. The first case is highlighted automatically. You can select a different case using the arrow keys or clicking a specific case with the mouse.

To forward a case to another inquiry application, follow the steps below:

1. Select a case from the spreadsheet.

2. Click on one of the three inquiry buttons and the application will appear with the selected case displayed. (Case Status Inquiry, Pathology History Inquiry, or Case Findings Inquiry.)

3. The case will forward automatically.
Case Status Inquiry
Use Case Status Inquiry to view the current result status of all processing tasks and reports associated with the case, as well as the current inventory (specimens, blocks, and slides) associated with the case.

Reviewing Case Status
Click the Case Status Inquiry button on the Appbar, or from within the Case List application.

Complete the following steps to load and review a case:

1. If you know the number of the case you want to review, enter it in the case box and press TAB. (From Case List this will automatically fill with the previously requested case.
2. If you do not know the case number you can search for it. Select cases using the same steps found in Case List application

- Report Tab
- Processing Tab
- Inventory Tab
- Outside Case Numbers
Case Findings Inquiry

Overview of Case Findings
Case Findings Inquiry is used to review information on verified reports. Case Charges, Internal Codes and Diagnostic Correlation events can be added to verified cases. Reports can also be manually expedited.

Using Case Help
The Case Help dialog is an efficient mechanism to query the pathology case database by patient name or case number range. This option is useful if reviewing only one case. To use the Case Help dialog, follow the steps below:

1. Click the ellipsis button next to the Case field. The Case Help dialog box appears.
2. Select the Patient Name or Case option and enter the information.
3. Click Find.
4. Once you have found the case, click OK. Clicking OK forwards the case information to the main window and closes the dialog.

The system displays the case, report, status, pathologist, and patient and case demographics. Below the demographics section, Case Findings displays a text editor that contains all resulted components of the report.

Using Case Search
Case Search dialog which provides additional search options, such as specimen, ordering physician, and pathologist. This search option is particularly useful if searching for a list of cases that qualify for the selected search criteria. Once a case from this list is loaded into the main application window the next available case in the list can be loaded by either clicking on the list icon or using the up/down arrows on the Tool Bar.
Complete the following steps to search for cases:

1. Select Case Search from the Task menu, or click on the icon. The Case Search dialog box opens.

2. From the Case Search dialog box, select only the criteria by which you want to search by. The fields to the right of the criteria list are specific to the option selected.

3. If you select Name, enter the name in the Name field. To enable Soundex search capabilities, click the Soundex search box. Click Add.

4. If you select Prefix, choose a prefix from the drop-down list. Only one prefix can be selected for the case list. Click Add.

5. If you select Prefix Group, choose a prefix group from the drop-down list. Click Add.

6. If you select Responsibility, enter or choose a pathologist or resident from the drop-down list. Click Add.

7. If you select Physician, enter or choose a physician from the drop-down list. Click Add.

Note: The Date, Specimen, and Institution criteria are enabled once at least one of the above options has been made.

8. If you select Date, enter or select a date type from the drop-down list. Choose your date options appropriate for the case list.

9. If you select Specimen, enter or choose a specimen from the drop-down list. The specimen codes displayed are based upon the prefix previously selected. Click Add.

10. If you select Institution, enter or choose an institution from the drop-down list. Security options are present so that the user is restricted from selecting any institution values which the user does not have security to access. Click Add.

11. Once you have selected the criteria for the search, click OK. A list of qualifying cases will display.
Reviewing Cases

Once a case report is loaded into the application several reviewing activities and functions can be performed.

- Case lists generated using Pathology Case Retrieval can be loaded into Case Findings for review by using the Case Retrieval Results... icon
- Diagnostic Correlations events for the case can be reviewed and performed by clicking Task>Review and selecting Diagnostic Correlations.
- Internal Codes can be added or removed from the case by clicking on the Review Diagnostic Codes icon
- Internal Codes can be added or removed from the case by clicking on the Review Diagnostic Codes icon

Unverified Reports

Depending on the security settings for the enduser position unverified AP report text can be viewed in Case Findings.

“This report is not authenticated.”

The Manager/Supervisor, PathNet Transcriptionist and Pathologist positions will see the AP report loaded as it appears in Transcription and Online Review as view only. Required sections display in Red font.
Pathology History Inquiry

Overview of Pathology History Inquiry
Pathology History Inquiry displays the report text for all selected cases associated with a patient. Other cases, which are associated with person records which may or may not actually be the same person, are also considered for presentation. Cases associated with person records other than the one selected are evaluated for inclusion at the person level, and are selected automatically based on a “level of confidence” factor.

Searching by Case History
A search for previous Pathology History on a patient is initiated by using the Case Search icon.

When the Case Search window is open use the following steps listed below to search for cases based upon selected criteria.

1. Enter the patient name in the Patient: field.
2. Click on Date and select the Date Type: from the dropdown menu and either the specific date range or during the previous months or years. Click Add to save the selection.
3. A History Group must be selected if one has not been defaulted by the user. Select from the History Grouping dropdown. Click Add to save the selection.

NOTE: Summary View displays limited information about the case, primarily Clinical Information and Diagnosis. Detail View will provide more case information but may not contain the entire report depending on the case type selected.

4. Specific Prefixes can be selected by clicking Prefixes, highlighting the desired prefixes in the Available: field; click Move to move them to the Selected: field. Click Add to save the selection.
5. Click OK. A list of qualifying cases will display.
Navigating in Pathology History Inquiry

When a list of qualifying cases is returned by the Case search a case can be reviewed by double clicking on the case row. The case will load into the main application window.

If more than one case is displayed in the search result the next case can be reviewed by clicking on the Case Search Results icon or the up/down arrows within the Pathology History Inquiry window that is displaying the selected report.

Unverified Reports

Depending on the users security they may have access to view unverified results through Pathology History inquiry. Reports that are unauthenticated can be viewed and are flagged in the Case Search Results and in the main window.

The Unauthenticated column in the Case Search window indicates that the report listed has not been verified but are available for viewing.

The flag beside the Case: section indicates the current report that is loaded for reviewing is not verified.
Inventory Management

Overview of Inventory Management
Use Inventory Management to organize and store anatomic pathology specimen, block, and slide inventory items. Inventory is created when specimen and processing tasks are ordered on a pathology case.

Checking in
Any inventory items in the inventory display are available to check in as needed.

Complete the following steps to check in inventory items:

1. In the Select Inventory dialog box, select inventory for review.
2. After inventory items are displayed in the main window, use the Select column to select one or more inventory items to check in as needed.
   - Use the Select All group box to select and deselect all inventory items for one or more inventory types as needed. When you select an option in the Select All group box, all of the items in the inventory display of the selected type are selected automatically.
   - When you filter inventory types using the View menu, those items that are filtered out are not included in the selection for an inventory action. Only unfiltered items in the display are included when an action is taken.
   - Collapsed items, however, can be included when an action is taken. If you have collapsed any cases in the tree hierarchy, and you have selected items that are included in a collapsed view, those items associated with the collapsed cases are included in the selection for an inventory action.
3. From the Task menu, select Check In to open the Check In (Inventory Type) dialog box. If you have selected specimen, block, and slide inventory items, a corresponding Check In dialog box is displayed for each type of inventory during the check-in process.
   - If the tasks associated with one or more of the selected inventory items have not been completed, the following message is displayed: The tasks associated with the selected items are not complete. Are you sure you want to store the selected items? The items in question are selected automatically in the inventory display spreadsheet, so you can easily review them as needed. Select OK to continue the check-in process with the current selections, or you can click Cancel to modify your selections.
   - If one or more of the selected inventory items has a status of Discarded, the following message is displayed: The selected items are marked as Disposed. Are you sure you want to check in the selected items? The items in question are selected automatically in the inventory display spreadsheet, so you can easily review them as needed. Select OK to continue the check-in process with the current selections, or you can click Cancel to modify your selections.
4. In the Check In (Inventory Type) dialog box, you must select a valid storage location. A default storage location might be displayed; you can accept the default location or select a new one as needed.
   o For inventory items that have never been stored, the Select New Location option is selected automatically and the system displays a default check-in location based on the last storage item (compartment) you selected for the specific inventory type. This default persists for the selected inventory type until you select a new storage location.
   o For inventory items which have been stored previously, the Return to Original Location option is selected automatically. You can return the item to the location previously stored, or select the Select New Location option as needed. When you select the Select New Location option, the system displays a default check-in location based on the last storage item (compartment) you selected for the specific inventory type.

   Note: The Return to Original Location option is selected only when all of the inventory items you are checking in for a specific inventory type have been either Stored, Checked In, Checked Out, or Discarded. For example, if you select some inventory items of the same type that have been Checked Out and others that never have been stored, only the Select New Location option is enabled.

   When you check inventory in for the first time, or to a new storage compartment, a Stored event is recorded. When you check inventory in and return it to the original location, a Checked In event is recorded. For both Stored and Checked In events, the status of Stored is displayed.

5. If a default storage location is not displayed, or if you want to select a new location, click the ellipses (…) button to open the Select Storage Location dialog box.

6. In the Select Storage Location dialog box, select a storage view from the list. Only those views associated with the APS03 contributor source are displayed.

7. Select a storage unit and expand the tree to select a storage shelf and compartment. If a valid compartment is not available, right-click the shelf and select Create Compartment from the context menu to add a new compartment.
   o If storage units are associated with organizations in DB Location Resource Hierarchy (Location.exe), only those units associated with organizations to which you have access are displayed.
   o When you are checking in inventory, only compartments defined for the selected inventory type are available for selection.

8. After you have selected a valid compartment, click OK to close the Select Storage Location dialog box.

9. If you have more than one inventory type selected, click Next to display the next Check In (Inventory Type) dialog box as needed. Select a valid storage location in each dialog box.

10. When you have checked in all of the selected inventory items, click Finish to close the Check In (Inventory Type) dialog box. In the inventory display spreadsheet, the status for each of the selected inventory items is updated to Stored and the Storage Compartment is updated to indicate the selected storage location. The user who performed the check-in process and the date and time of check in also are retained in the system and displayed in the spreadsheet. When inventory is stored initially, the Suggested Disposal column displays the date calculated from your reference database by which the inventory should be disposed.
Checking Out

Any inventory items with a status of Stored are available to check out as needed. Items that have never been stored or those with a status of Checked Out or Discarded are not eligible for the check-out process.

Complete the following steps to check out inventory items:

1. In the Select Inventory dialog box, select inventory for review.
2. After inventory items are displayed in the main window, use the Select column to select one or more inventory items to check out as needed.
   - Use the Select All group box to select and deselect all inventory items for one or more inventory types as needed. When you select an option in the Select All group box, all of the items in the inventory display of the selected type are selected automatically.
   - When you filter inventory types using the View menu, those items that are filtered out are not included in the selection for an inventory action. Only unfiltered items in the display are included when an action is taken.
   - Collapsed items, however, may be included when an action is taken. If you have collapsed any cases in the tree hierarchy, and you have selected items that are included in a collapsed view, those items associated with the collapsed cases are included in the selection for an inventory action.
3. From the Task menu, select Check Out to open the Check Out Inventory dialog box. All of the selected inventory items are displayed in the spreadsheet, and a summary of the number of specimen, blocks, and slides being checked out is included.
4. You must indicate to where the selected inventory items are being checked out. Select a specimen tracking location from the list or click Add to add a new location as needed.
5. If you are adding a new tracking location, enter a name and business telephone number for the new location in the Add Tracking Location dialog box. When you click OK, the Address Details dialog box is displayed. You can enter a business address for the new location at this time and click OK. You also can click Cancel to close the dialog box without entering an address.
   - The system validates that new checkout locations are saved with unique names. In addition, when you create a check-out location with an incomplete address, the following message is displayed: This address is new, but no address data has been supplied. Do you want to delete this address? You can choose to save the incomplete address, or save the location without an address.
6. The system automatically calculates the information in the Expected Return Date box by adding the number of days entered in the Customize dialog box to the current date. Use the spin box to modify the date as needed. For tips on using date spin boxes, see Entering a Date.
7. In the Check Out Inventory dialog box, click OK to save your selections and check out the selected inventory items.
8. If you are printing check-out letters, the Print Report dialog box is displayed.
9. In the inventory display spreadsheet, the status for each of the selected inventory items is updated to Checked Out. The check-out location, the user who performed the check-out process, the date and time of check out, and the expected return date are retained in the system and displayed in the spreadsheet.