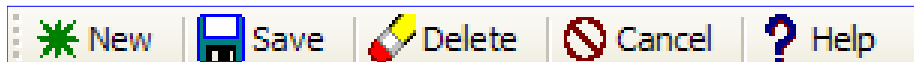# PROLIS™
Accession

Version 4.0

Accessioning

The routine provides the means to get the specimen registered upon getting in to the laboratory. While describing various parts of the routine we will discuss its functionality as well.


Top Function Bar

The top function bar is a collection of commands as the name and the picture of each command indicates, the commands are available to the user at various stages of the registration of the specimen. All commands are self explanatory except the left most button.

This button is a switch to change the mode between 'New Registration. And 'Edit' the registered specimen.

Progress Indicator
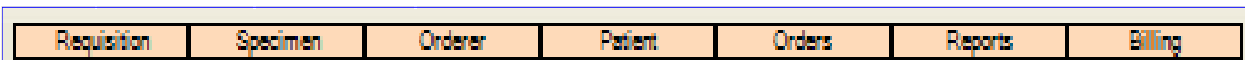
Since the accessioning is the most complicated routine in PROLIS, where the user could lose the track of completing various tasks. PROLIS provides this progress indicator bar to inform the user visually about the status of completed tasks with a green color as well as incomplete ones with a peach color. System would not save any information until all tasks (Requisition, Specimen, Ordering Provider, Patient, Orders, Reports and Billing, if activated) are complete (The whole bar is green).

Requisition Section

This section records the indicated information here. The system generated

Accession ID which can also be manually typed, PROLIS ensures of its uniqueness, The requisition Number is the patient recognizing information received from the Ordering Provider. Accession Date and Time is the system generated information which can be modified if needed. All information in this section, is populated automatically for a speedy data entry.

Specimen Type

PROLIS is capable of handling Clinical Specimen (that of a patient—default), environmental (non clinical) specimen and Regulatory Specimen like specimens from the Regulatory Agencies (Proficiencies from Health Department, CAP, AAB and/or COLA.
Other informational fields like Accessioned By, Analysis Stage, Last Edited By and the Last Edited on, are there for the latest information about the specimen but are not editable by the user.

Specimen Tab

First and the left most of 6 Tabs of this routine, is the specimen Tab the function of which is to record the particulars of the specimen received. At the top, there is grid named 'Specimen Contents' that contains the contents as the name depicts, of the specimen. All columns of the grid, are self explanatory except the first labeled 'No'. This 'No' column is not just the serial number, it is also a system to assign a unique number to each

specimen container (SST, Lavender or Urine etc) within the specimen. Digits left to the dash, represent the accession number and the digit(s) right to the dash, is a unique number for the specimen content type. If a specimen contains 2 SST's, both will have the same number but another type of specimen content (Lavender for example) would have a different number.
All other fields in the specimen Tab, are meant to build the individual contents to be entered in the grid. Once a content is entered in the grid, it is not editable inside the grid. An incorrect content should be removed from the grid, using the 'Remove' button followed by building the correct content and be entered in to the grid, using the button 'Add to List'.

Building a Specimen Content

Select the specimen source, using the dropdown. If the desired source is not found in the dropdown, use the 'Source Building Routine' (on next page) to add a new source to the dropdown, by clicking the button, just right to

the dropdown. The selection of the source will fill all remaining fields with default values except the source comment field. All default values are editable by the user.
The one click process of source selection completes the building of the Specimen Content and makes the Content ready to be moved to the Specimen Contents grid thus supporting the PROLIS specific feature of the 'Speedy Data Entry'.
The system should have specimen contents with appropriate sample sources required by the components to be analyzed, in order to order those components in the 'Orders Tab'.

Source Management Routine

PROLIS provides this routine to build, add, edit and/or delete specimen sources.

Add New Source

To add a new source to the system, click left most button on the top function bar, to make sure it says 'New' instead of 'Edit'. Source ID is populated automatically. Enter the Source Name and the Unit of Measure (UoM). Select the Material Name from the dropdown box. If the desired material is not found in the dropdown, add the desired material accessing the 'Material Management Routine' (Following Routine) by clicking the button just right of the material dropdown. Finally click the 'Save' button to save the record.

Edit/Deleting Existing Source

To edit an existing source in the system, click left most button on the top function bar, to make sure it says 'Edit' instead of 'New'.
Double click the source to be edited or deleted, within the grid. The record will be displayed in the bottom editing fields. User can not change the system assigned ID but all other fields. Make required changes to fields and press 'Save' button to save the record. Of course, there is no need to make any change before deleting any source. You may delete the displayed record if it is not being used in the Accessioning. System won't let you delete the source if it has been used in the Accessioning.

Material Management Routine

PROLIS provides this routine to build, add, edit and/or delete materials to be tested. Materials can be created, edited or even deleted in this routine following the procedures listed on the next page.

Source and Material are interchangeable terms where Material is used in PROLIS functionality and Source is used for the user's convenience.

Add New Material

To add a new Material to be populated in the Material dropdown in the Source Management Routine, click left most button on the top function bar, to make sure it says 'New' instead of 'Edit'.
Material ID is populated automatically.
Enter the Material Name and the Unit of Measure (UoM). PROLIS will make sure of avoiding duplicate materials.
Save the record by clicking the 'Save' button.
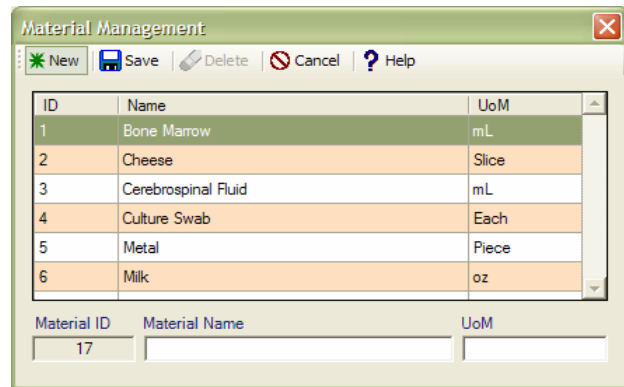

Edit/Deleting Existing Material

To edit an existing material in the system, click left most button on the top function bar, to make sure it says 'Edit' instead of 'New'.
Double click the material line to be edited or deleted, within the grid. The record will be displayed in the bottom editing fields.
User can not change the system assigned ID but all other fields. Make required changes to fields and press 'Save' button to save the record. Of course, there is no need to make any change before deleting any material. You may delete the displayed record if it is not being used in the Accessioning. System won't let you delete the material if it has been used in the Accessioning.
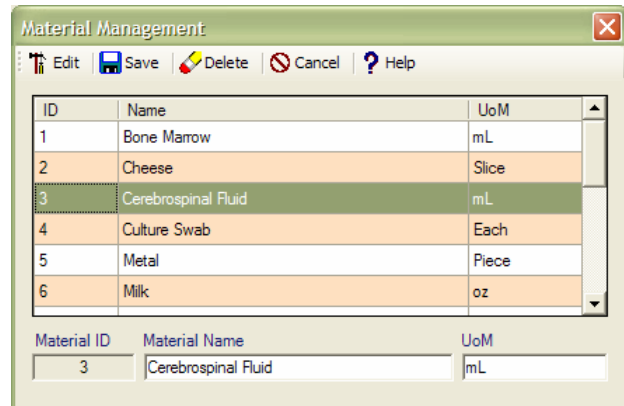
Ordering Provider Tab

Second of 6 Tabs of Accessioning routine, is the 'Ordering Provider' Tab that is used to record the ordering provider's information.
To add a Ordering Provider for the specimen, either enter the ID for the provider in the 'Orderer ID' field or use the 'Look Up' window by clicking the button next to the Orderer ID field. PROLIS will pull the provider's

record if a valid ID is entered. To remove the displayed provider, use the button with 'Eraser' icon. None of the field is editable by the user except 'Orderer ID' and 'Chart/EMR No/Prof ID'.
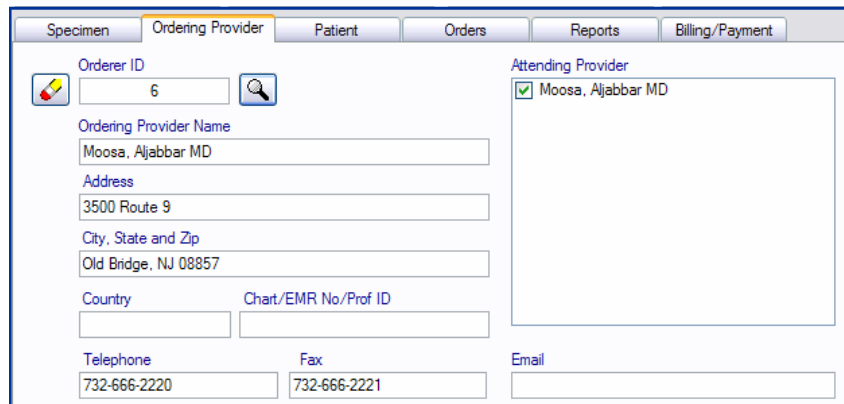
The usage of this Tab is mandatory no matter what kind of specimen is being processed.
For a Clinical Specimen, the 'Ordering Physician' would go in here, for an Environmental Specimen, the 'Ordering Body' (could be an organization or an individual seeking the laboratory service) should go in here and for a Proficiency Specimen, the Agency (Health Department, CAP, AAB or COLA etc) information should go in here.

Patient Tab

Third of 6 Tabs of Accessioning routine, is the 'Patient' Tab that is used to record the patient's information along with the associated diagnosis codes.

This Tab is available and active only for a Clinical Specimen.

To add a Patient for the specimen, either enter the Patient ID in the 'Patient ID' field or use the 'Look Up' window by clicking the button next to the Patient ID field.

PROLIS will pull the patient's record along with associated diagnosis codes, if a valid ID is entered. To remove the displayed patient, use the button with 'Eraser' icon. None of the field is editable by the user except 'Patient ID' and Dx Code. Of course, the list of patient codes, is available to remove any code from or to add any code to.

Upon entering the patient, the list of current orders, is emptied out to accept new orders for the patient.
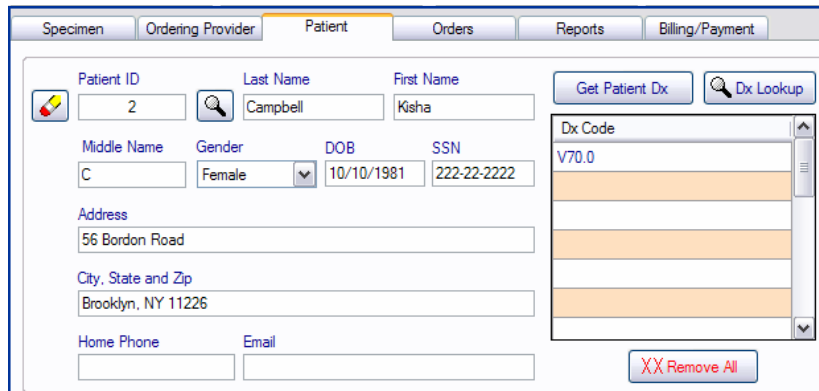
How to add or remove a Diagnosis code from a Specimen

Although all diagnosis codes are fetched from the patient file for a speedy data entry when the patient is tried to associate with the specimen being processed, a final diagnosis code association with the specimen, must be made using the diagnosis codes provided by the ordering provider.

In order to add a diagnosis code in to the list, enter a valid code (PROLIS does not check the validity) in the field labeled 'Dx Code' or use the Dx Lookup button, just next to the 'Dx Code' field, to get a valid code if the ordering provider just provided you with a Description of the diagnosis. PROLIS will bring a valid code in to the field 'Dx Code'. Then click the 'Add' button to add the code to the list above.

To remove a code from the list, simply click the code with the list and press the button labeled 'Remove' or double click the code to be removed. To clean the list completely, click the button labeled 'Remove All'.

Orders Tab

Fourth of 6 Tabs of the Accessioning Routine, is the 'Orders Tab' that is used to process the orders of lab components and other lab services.

How to order a Test for a Specimen in Prolis

As shown, the test ordering tab, has 2 lists. One list on the left side, is the one with all available components (individual tests, Groups and Profiles) in Prolis and the other list on the right side, for the components ordered for the specimen. After passing the following 2 constraints, components are ordered as followed;
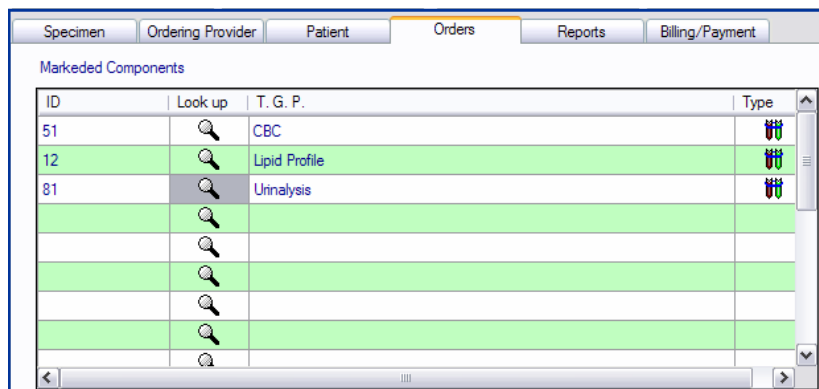
- The first constraint is the specimen itself. In order to get the component ordered, the specimen must contain the source (material), the component to be ordered is analyzed on. For example, in order to get Urinalysis ordered, the specimen must have urine as a specimen content.

- The 2nd constraint is the marking modifier if any defined for the component being ordered. In order to avoid a lot of operational mistakes and user induced errors, PROLIS provides a mechanism to impose some restrictions on ordering specific components. The mechanism is called as 'Marking Modifiers'. For example, a pregnancy test can be stopped from being ordered on a male patient or PSA can only be ordered for a male patient only at a certain age.

Either double click the component in the Available Components list or single click the desired component in the Available Components list followed by clicking the button labeled with a single right arrow (>). After passing both constraint listed above, the component will be ordered.

To remove any component from the ordered list, single click the component followed by clicking the button labeled with a single left arrow (<).

In order to clear the entire ordered component list, click the button with 3 left arrows (<<<).

Reports Tab

Fifth of 6 Tabs in the Accessioning routine, is the Reports Tab which is used to record the instructions for delivering the result reports. Upon entering the ordering provider, a default entry is made in this section (as a part of PROLIS specific speedy entry), to print and deliver the result report via courier. This default instruction can be modified and more report recipients (like

Referring Provider) can be entered in this section, to deliver the report via Courier and/or Email and/or Fax. The Tab fully supports the PROLIS 'Speedy Data Entry'

The report recipients grid is to collect report delivery orders. Once the order is entered in to the grid, can not be modified. In order to modify the order, remove the incorrect order, compile a correct one and add to the list.

How to compile a Report Delivery Order

Fetch the desired provider by entering his/her ID in the 'Provider ID' field or using the Provider Lookup button. System will pull a set of default report delivery instructions stored as a part of the provider's profile, contributing to the 'Speedy Data Entry' feature of PROLIS. These default instructions are editable by the user.

The default of the report status 'Partial OK' can be changed to 'Complete Only'. This instruction tells the RDM (Report Delivery Module) to consider the status of the report before attempting to deliver the report.

The default report delivery method (Courier) can be switched off, a second email method can also be switched on and the third Fax method can also be optionally turned on, in the order before submitting the order to the grid.

Obviously, if email method is turned on, the system requires the user to provide the email if the recipient profile is missing it. Similarly, if Fax method is turned on, system would require the fax number if it is missing from the recipient's profile otherwise it is pulled from the profile.

Billing/Payment Tab

The 6th of 6 Tabs in the Accessioning routine, is the billing/payment tab, to record the particulars of the billing and payment of lab services regarding the specimen being registered. Keeping the natural hierarchy of the tab, we will start describing all options starting with Gratis (Free service).

The top left most button of the tab, should be used to switch between the Free and Charge service. If the option 'Gratis' is selected, all features and fields are disabled and enabled otherwise. The default is the 'Charge' state.

The next field 'Primary Responsible Payer' dropdown, is used to tell the system who the primary responsible party is. Specimens having no patient involved, have only 2 options. i.e., Ordering Entity and the 3rd Party. Specimens with the patient involved, would a 3rd additional option, the patient.

The system was intended to be used in the following situations as follows;

1. **Courtesy and Proficiency Specimens**
    Select the service option 'Gratis', using the top left most button.

2. **Specimens from Ordering Providers, paying for the services**
    Select the service option 'Charge' (default) and select 'Client—Ordering Entity' from 'Primary Responsible Payer' field, which is the first option.

3. **Clinical Specimens of patient with no Insurance (Self Pay)**
    Select the service option 'Charge' (default) and select 'Self Pay—Patient' from 'Primary Responsible Payer' field, which is the third option.

4. **Clinical Specimens of patient with a Primary Insurance**
    Select the service option 'Charge' (default) and select '3rd Party—Insurance' from 'Primary Responsible Payer' field, which is the second option.
    Provide the Insurance information in Primary Insurance section. If the patient is the subscriber, System will put the data in the subscriber fields.