# PROLIS™

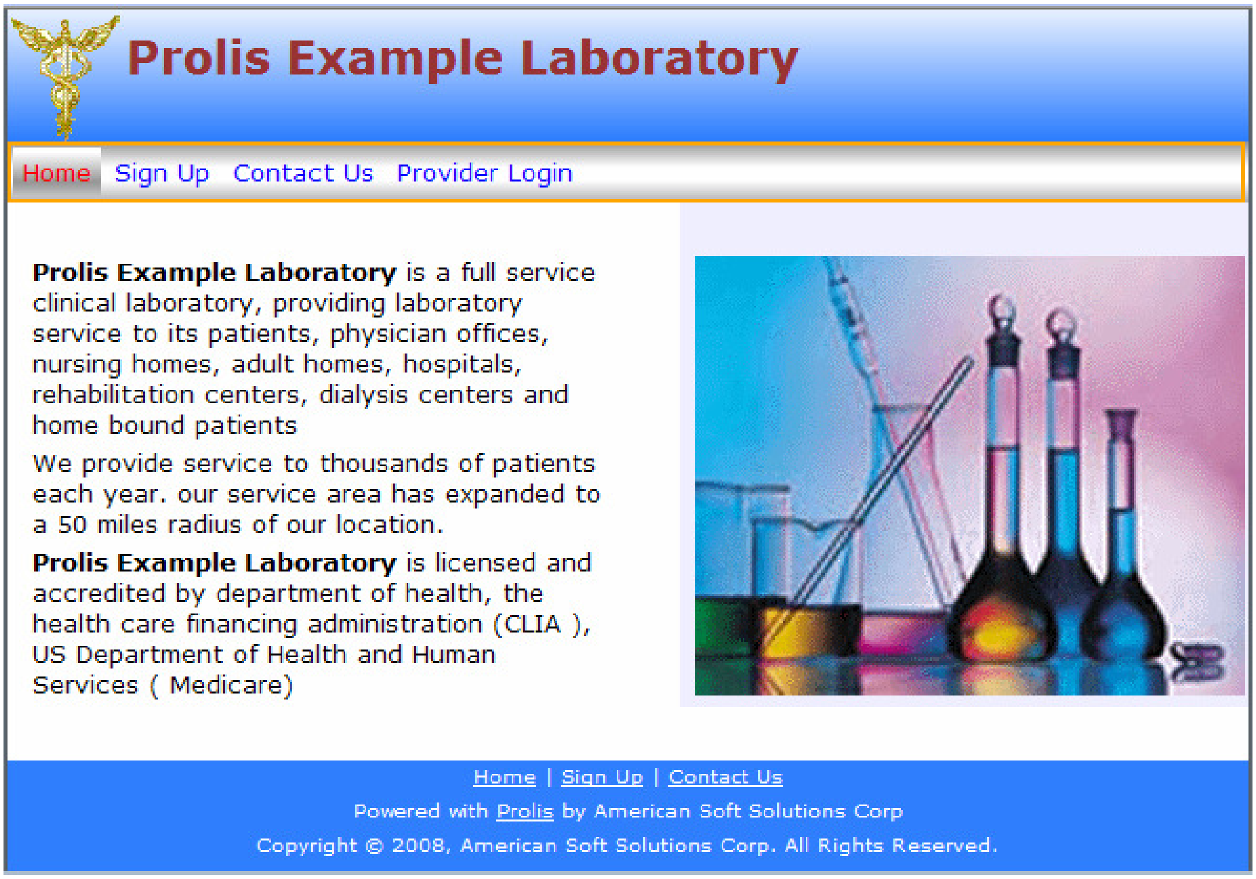
Version 4.0

# Laboratory Outreach

The Prolis module named 'Laboratory Outreach' is for Prolis using reference laboratories who wish to service their clients using web. The module is comprised of 6 routines. Three routines out of 6, are available to every body visiting the laboratory's site but the remaining three routines are only available to the laboratory's authorized clients. Client's access to the laboratory's site is controlled by the laboratory administrator.

# The Home Page

The home page of the Laboratory Outreach module presents menu options an a brief description of the laboratory. The description of the laboratory can be customized at the laboratory's request.




## The Menu


Every page of the Outreach presents the menu with options appropriate to the site visitor. The shown menu presents only option for an anonymous visitor. If the visitor is an authorized client of the laboratory and does provide the login credentials then the following menu is presented with additional options to navigate to the routines to be used by only the laboratory clients.

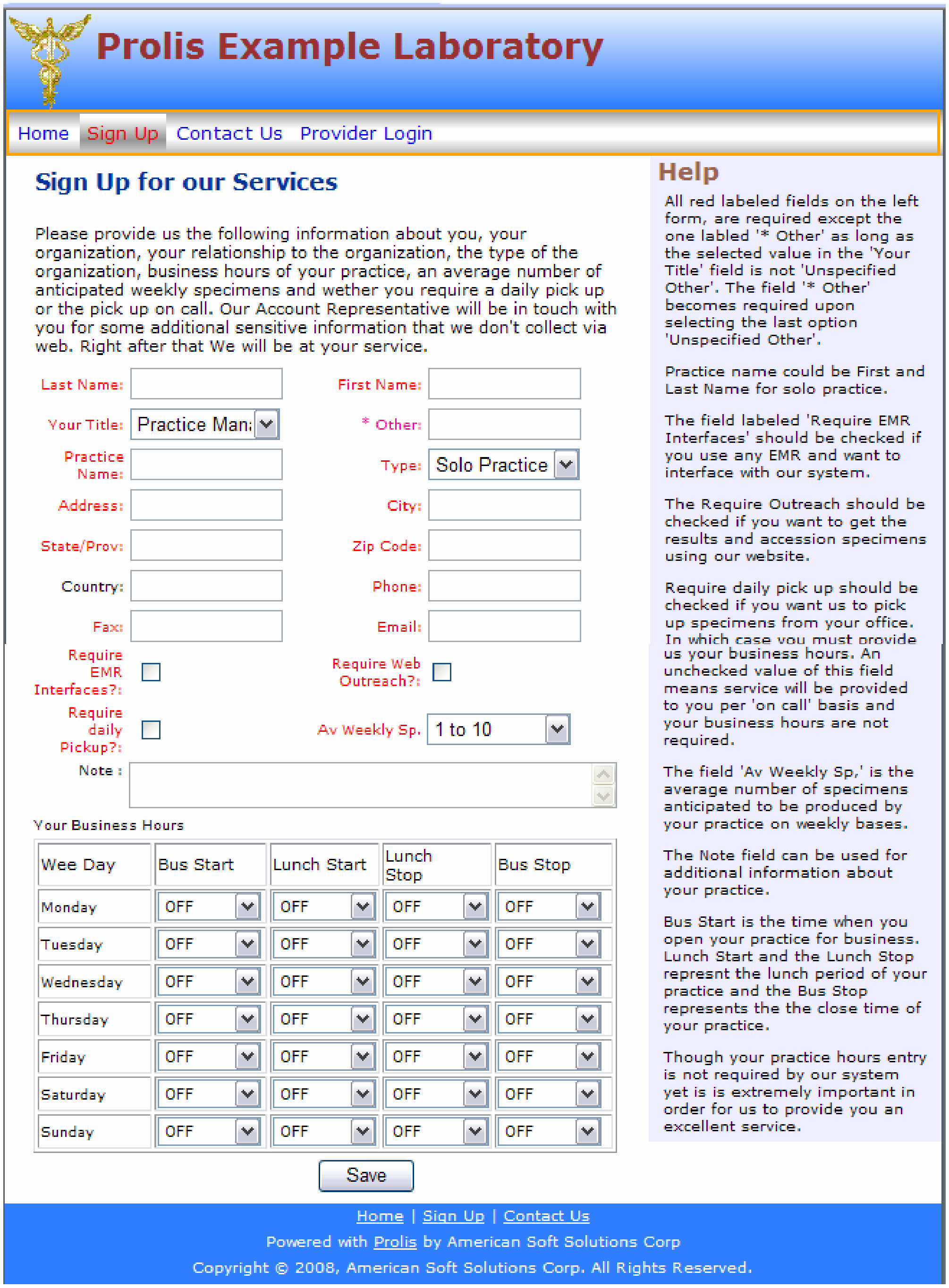

The 'Sign Up', 'Contact Us' and the 'Provider Login' options are to navigate to respective routines that are available to every body. The 'Logout', 'Results' and the 'Accession' options to the respective options are to navigate to respective routines that are only available to an authorized client of the laboratory.

# The Sign Up Page

The Sign Up routine can be accessed by any body from any where when on the laboratory's site, by clicking on the ‘Sign Up’ option of the menu. The routine facilitates the sign up process of the laboratory’s services for prospective clients of the laboratory. This routine provides maximum possible information of a prospective client.

The page contains all fields to capture the information of the prospective client with all possible help text to fill up the form. Required fields are labeled red. The system won’t process the page until all red fields are provided the information with. The black labeled fields are for additional information about the client but not required by the system. The bottom part of the is to collect the office timing of the prospective client.

After the visitor fills up the form and clicks the save button, the system sends an email to the laboratory with all the information entered in this form.



Prolis Example Laboratory

Home Sign Up Contact Us Provider Login

## Sign Up for our Services

Please provide us the following information about you, your organization, your relationship to the organization, the type of the organization, business hours of your practice, an average number of anticipated weekly specimens and wether you require a daily pick up or the pick up on call. Our Account Representative will be in touch with you for some additional sensitive information that we don't collect via web. Right after that We will be at your service.

Last Name: First Name:

Your Title: Practice Man: * Other:

Practice Name: Type: Solo Practice

Address: City:

State/Prov: Zip Code:

Country: Phone:

Fax: Email:

Require EMR Interfaces?: Require Web Outreach?:

Require daily Pickup?: Av Weekly Sp. 1 to 10

Note :

Your Business Hours

| Wee Day | Bus Start | Lunch Start | Lunch Stop | Bus Stop |
|---|---|---|---|---|
| Monday | OFF | OFF | OFF | OFF |
| Tuesday | OFF | OFF | OFF | OFF |
| Wednesday | OFF | OFF | OFF | OFF |
| Thursday | OFF | OFF | OFF | OFF |
| Friday | OFF | OFF | OFF | OFF |
| Saturday | OFF | OFF | OFF | OFF |
| Sunday | OFF | OFF | OFF | OFF |

Save

**Help**

All red labeled fields on the left form, are required except the one labled '* Other' as long as the selected value in the 'Your Title' field is not 'Unspecified Other'. The field '* Other' becomes required upon selecting the last option 'Unspecified Other'.

Practice name could be First and Last Name for solo practice.

The field labeled 'Require EMR Interfaces' should be checked if you use any EMR and want to interface with our system.

The Require Outreach should be checked if you want to get the results and accession specimens using our website.

Require daily pick up should be checked if you want us to pick up specimens from your office. In which case you must provide us your business hours. An unchecked value of this field means service will be provided to you per 'on call' basis and your business hours are not required.

The field 'Av Weekly Sp,' is the average number of specimens anticipated to be produced by your practice on weekly bases.

The Note field can be used for additional information about your practice.

Bus Start is the time when you open your practice for business. Lunch Start and the Lunch Stop represnt the lunch period of your practice and the Bus Stop represents the the close time of your practice.

Though your practice hours entry is not required by our system yet is is extremely important in order for us to provide you an excellent service.

Home | Sign Up | Contact Us

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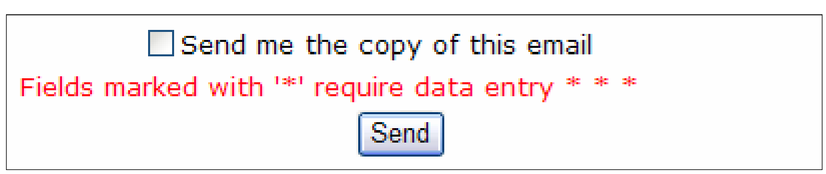
# The Contact Us Page

The Contact Us routine is the routine to facilitate the communication between the laboratory and the site visitors. The routine lists the laboratory's mailing address, the phone, the fax and a mechanism for the visitors to send an email to the laboratory. If the site visitor happens to be an authorized client of the laboratory, the system inserts the client's email address in the appropriate field automatically this making the email process a little easier and faster.


Your Email, the Subject and the Message fields are all required fields. If the Send button is pressed without providing all these 3 pieces of information, the system displays the following error in red.

If the field 'Send me the copy of this email' is checked, the site visitor also receives the copy of the email.

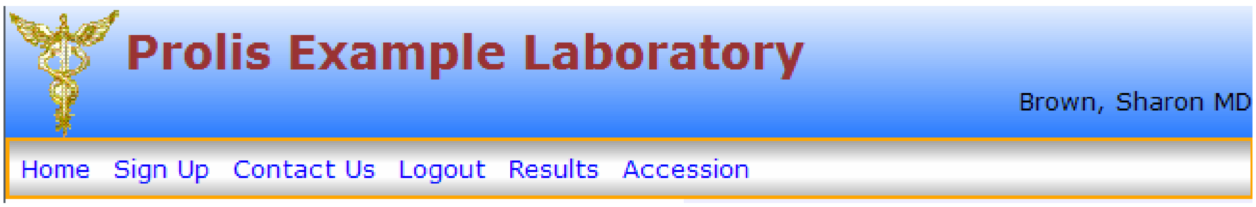


# The Provider Login Page

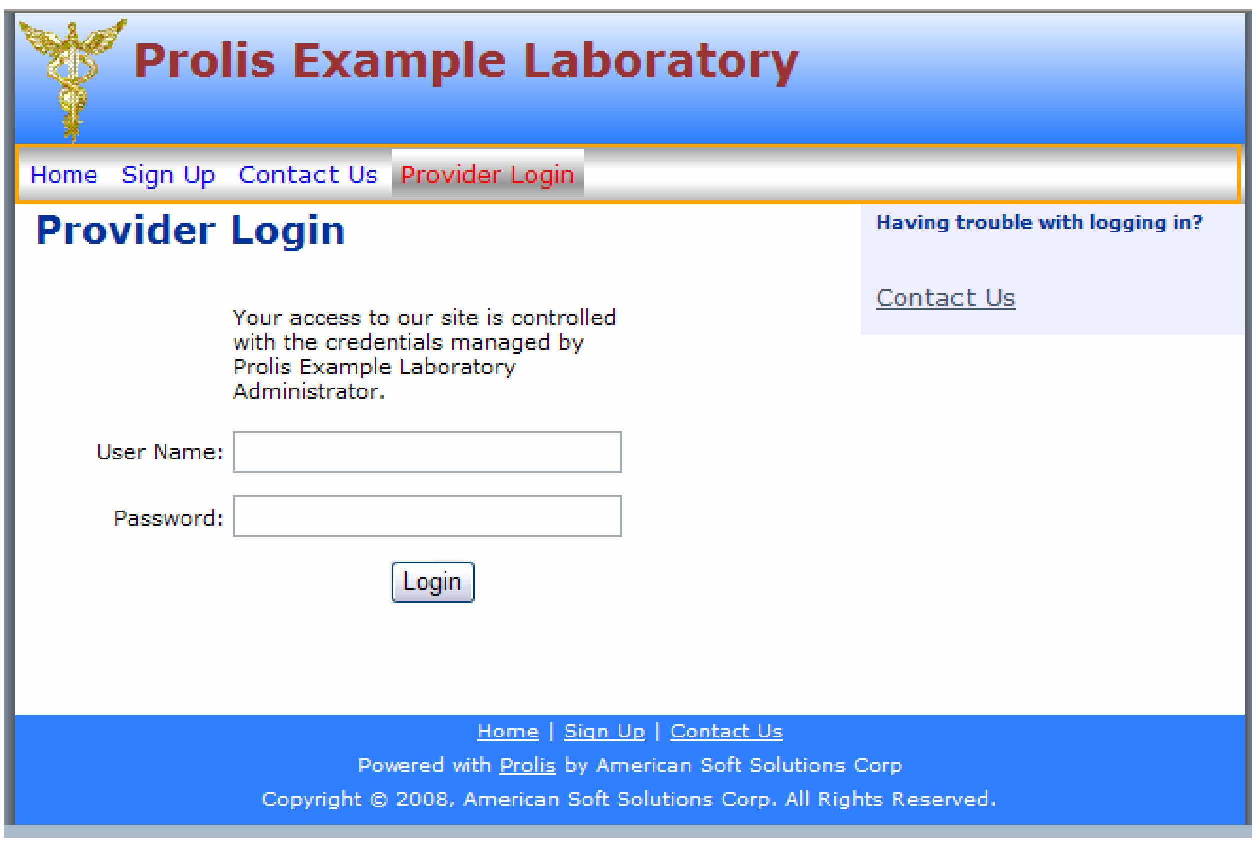
The Provider Login Page is provided to every visitor of the laboratory site via 'Provider Login' option of the menu. After the provider is logged in successfully, the 'Provider Login' option is removed from the menu and 3 new options, the 'Logout', 'Results' and the 'Accession' along with the client's name (as in the following snap shot, 'Sharon, Brown MD'), are added to the menu automatically.

### Menu before Login


### Menu after Login




Both pieces of information, the user name and the password, are required.



# The Results Page

The Results Page is provided to only an authorized client who logs in successfully to the laboratory site via 'Results' option of the menu that appears after login. The results page starts with the patient search mechanism as shown below.


## Patient Search (PROLIS standard)

In order to pull the results of a patient, you need to find the patient first. The patient search mechanism is just to do that.

### Search Term

In the 'Search Term' field, specify the value of the term. For example, if the 'Term Type' field is displaying the term 'Name (Last, First)' as in the above snap shot (default), then in the 'Search Term' field, enter the patient's name.

**Name (Last, First)**

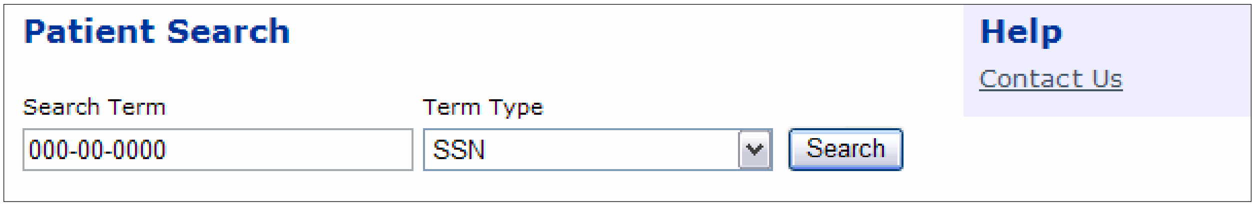
The patient name can be entered as follows;

- Just the Last Name in full. For example 'Campbell' or 'Frid' (without quotes). Or the last name in partial. For example 'camp' or 'ca' or 'Fri' or 'fr' (without quotes).
- The patient name can be entered as last name followed by a coma (,) and the first name. For example 'Campbell, Kisha' or 'Frid, Khalid'. The last and first names can be entered in partial. For example 'cam,kis' or 'c,k' or 'fr,kh'. The point to note is that when entering both last and first names (even partial), both names must be separated with coma (,). The blank spaces between names and the coma (,) play no roll. You may enter blank spaces between names and the coma (,) for better readability or skip. Make sure there is no space between name characters.

If the 'Term Type' field is displaying the term 'SSN' then in the 'Search Term', enter the patient's social security number.

**SSN (Social Security Number)**

The social security number (SSN) can be entered as follows;

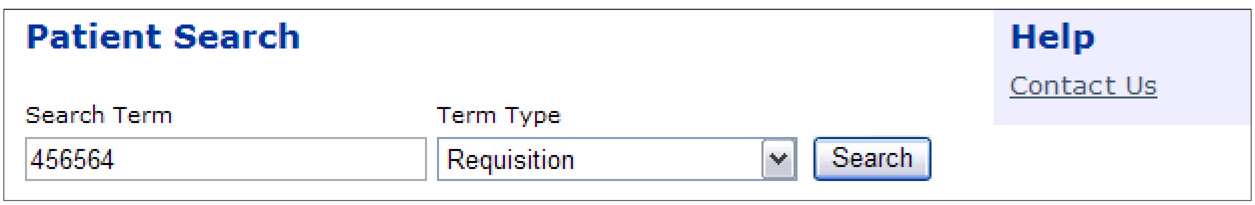



- Enter a complete social security number (no partial). For example **'000-00-0000'** (without quotes).
- Enter a complete social security number (no partial). For example **'000000000'** (without quotes).
- Enter a complete social security number (no partial). For example **'000/00/0000'** (without quotes).
- Enter a complete social security number (no partial). For example **'000_00_0000'** (without quotes).
- Enter a complete social security number (no partial). For example **'000.00.0000'** (without quotes).
- Enter a complete social security number (no partial). For example **'000\00\0000'** (without quotes).

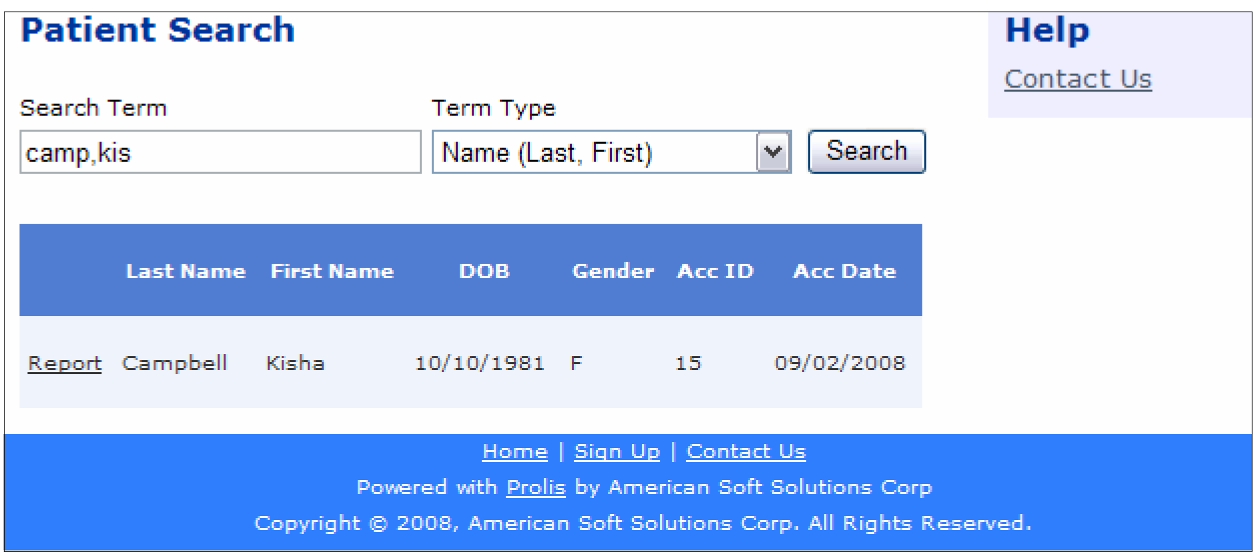
If the 'Term Type' field is displaying the term 'Requisition' then in the 'Search Term', enter the 'Accession' record if known.

**Requisition (Accession)**
The Requisition (Accession) can be entered as follows;

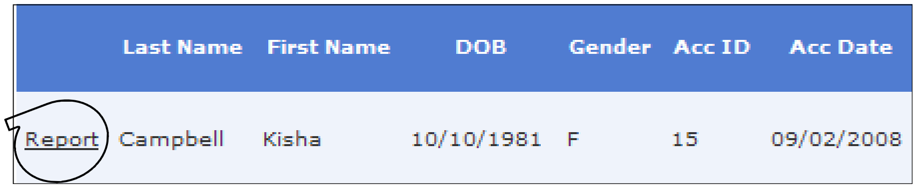
- Enter the accession record (only digits, 0-9. No alphabets). For example **'456564'** (without quotes).

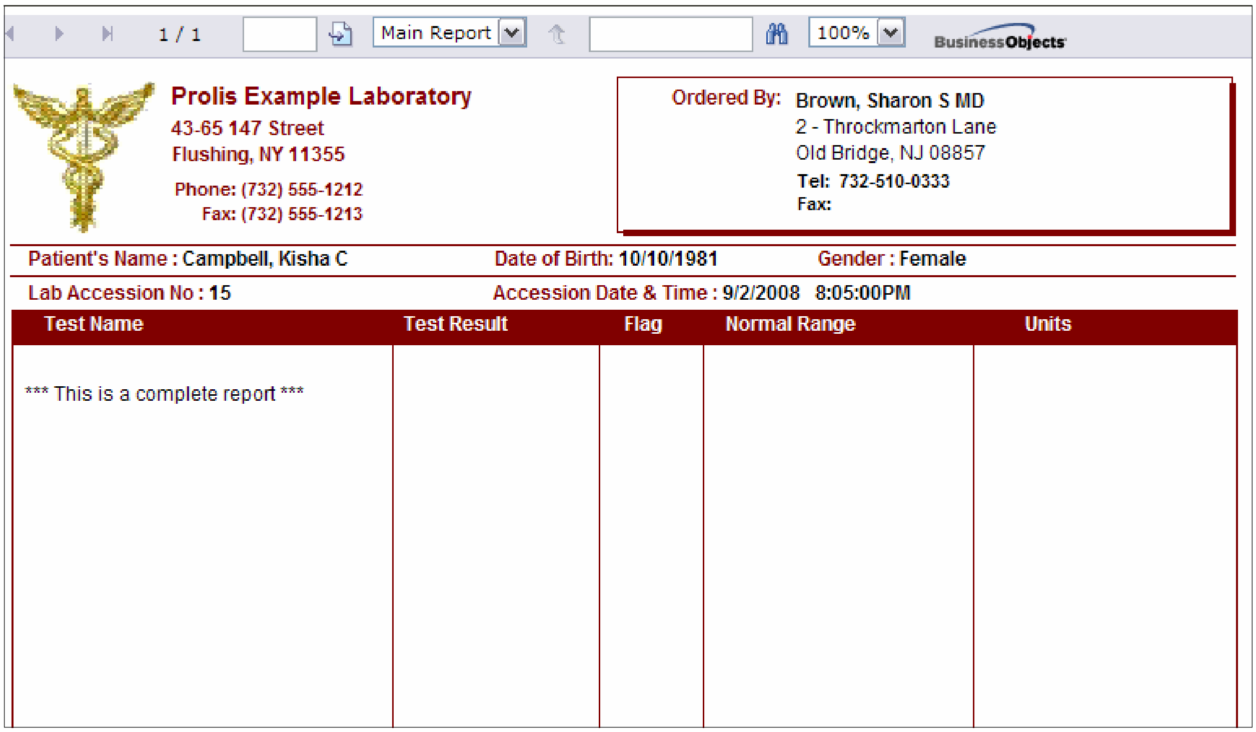



After entering the search term as described above, click the 'Search' button. The system will display the list of the patients meeting your entered search criteria.



After having your desired patient displayed just click the Report link on the left side of the patient.
The system will open the report in a new window as shown below;

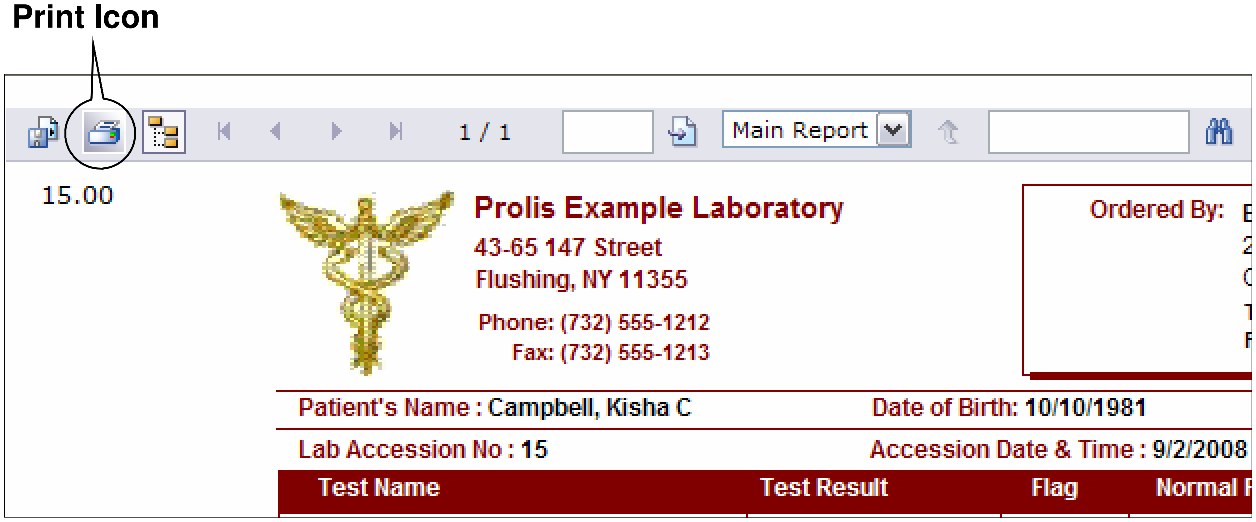



## Printing the Report

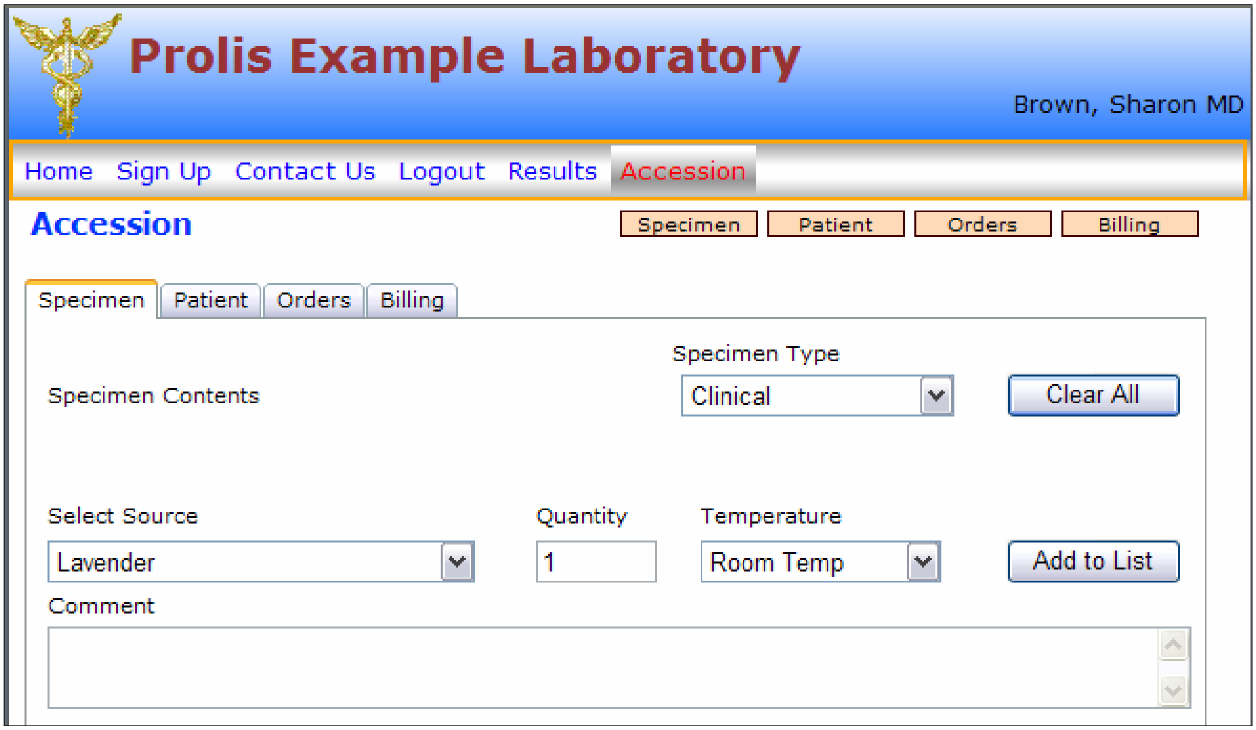
In order to print the report, click the print icon from within the displayed report.

**Print Icon**



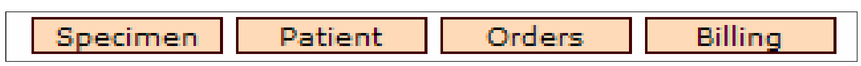
# The Accession Page

The Accession Page is provided to an authorized client of the laboratory where client can register the specimen to be analyzed, the patient along with the billing information for the laboratory to bill for her services. Though the routine is pretty much self explanatory, this guide is provided to be used where any confusion arises.




The routine is comprised of basic 6 elements.

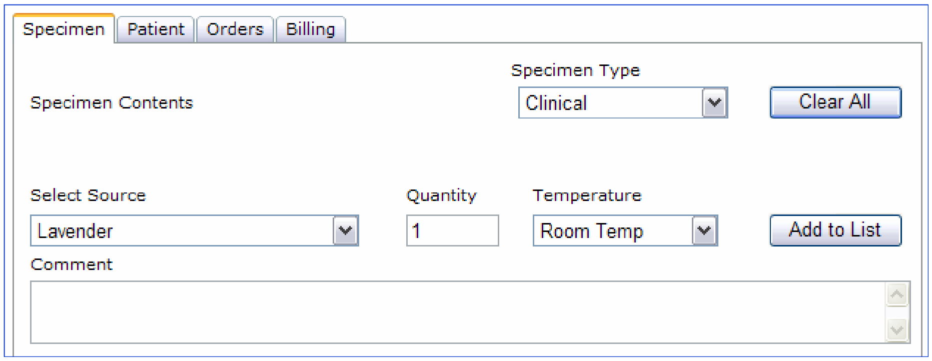
1. **Progress Bar**




Within this progress bar, each section represents the status of the respective data. A peach color indicates that the routine does not have sufficient required data for the intended transaction. For example a peach colored left most 'Specimen' section indicates that the routine has not been provided with the required specimen data yet. Upon entering the specimen data, the 'Specimen' section will turn green. That is true with all 4 above sections in the progress bar. The routine will not save the transaction until all of the sections are green. This bar enables the user to determine visually the completeness of the data. **WARNING:** The Progress Bar indicates only the completeness of the data not the correctness of the data. It is the user's responsibility to ensure the data correctness. For example, most of the times the billing section is green, indicating that no billing data needs to be entered as the default bill to option is pre-selected to the provider when the provider logs in. But if the patient needs to be billed for the services or there is a third party (Insurance) involved, the user needs to change the bill to option set to provider, to either to the patient or to the Insurance according to the requirement. Of course, the billing section of the progress bar will not stay green if the user changes the 'Bill To' option to the third party and does not provide the insurance information. Some times the billing section does not change the color from peach to green even if you have provided all the required data. In such a case, just navigate to any other tab, the section will change the color.

## 2. Specimen Tab

The specimen tab provides the mechanism to record the specimen information. The 'Specimen Contents' is blank if there is no specimen specified as shown in the snap shot. The Specimen Contents does have the entry if there is any specimen entered.




The field 'Specimen Type' is to select the desired type of the specimen. For example, the specimen type is Clinical for providers like physicians, hospitals or where ever there is patient care. If you have a patient to specify in the transaction, this field must be at Clinical.
Other options of this field, Industrial and Regulatory apply to non clinical laboratories and regulatory agencies respectively.

The button 'Clear All' is used to empty the Specimen Contents.

Fields like Source, Quantity Temperature, the button 'Add to List' and the field 'comment' are used to specify the specimen.

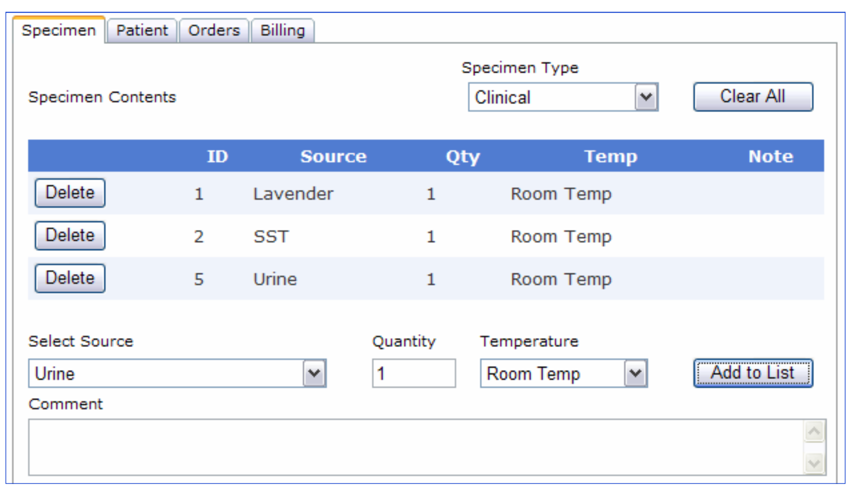
## Procedure

- Select the source. Like Lavender tube, SST, Urine or Culture Swab etc.
- Enter the quantity. The default is one.
- Select the temperature of the source. The default is 'Room Temperature'.
- Type the comment about the source if any.
- Click the button 'Add to List'

The source will be added to the Specimen Contents if it is not already there.

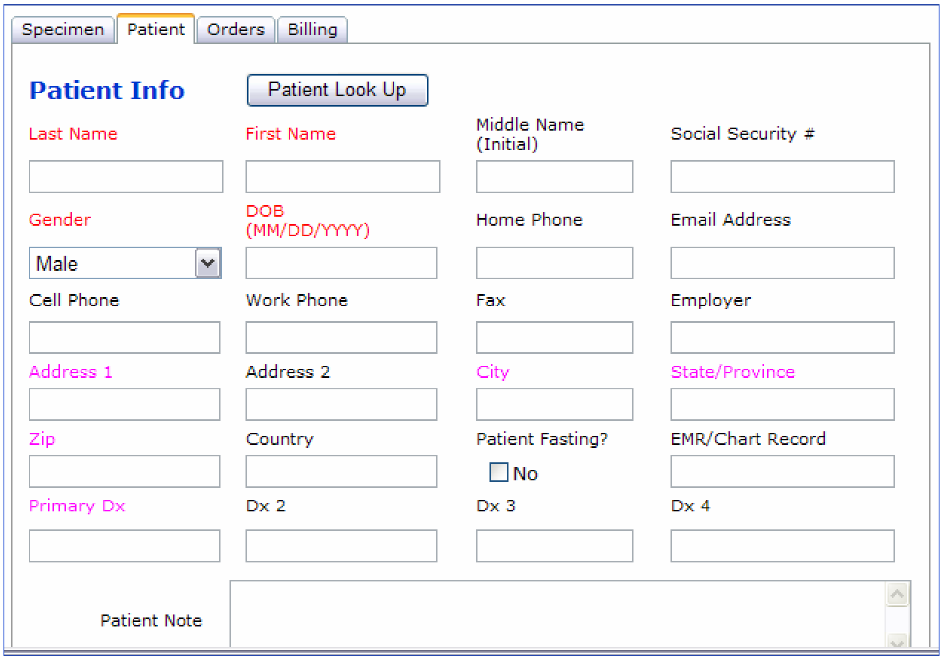
In order to remove one source from the Specimen Contents, click the button 'Delete' just in front of the item to be removed.

To remove all the items from the Specimen Contents, either delete one by one as mentioned above or
Click the button 'Clear All'.




**Note:** Contact the laboratory for any source not found in the drop down list.

## 3. Patient Tab




The Patient Tab is used to enter the patient data for the specimen being submitted to the laboratory for analysis.
There are 2 ways to enter the patient data in the system.

- Manual entry
- Pull and paste

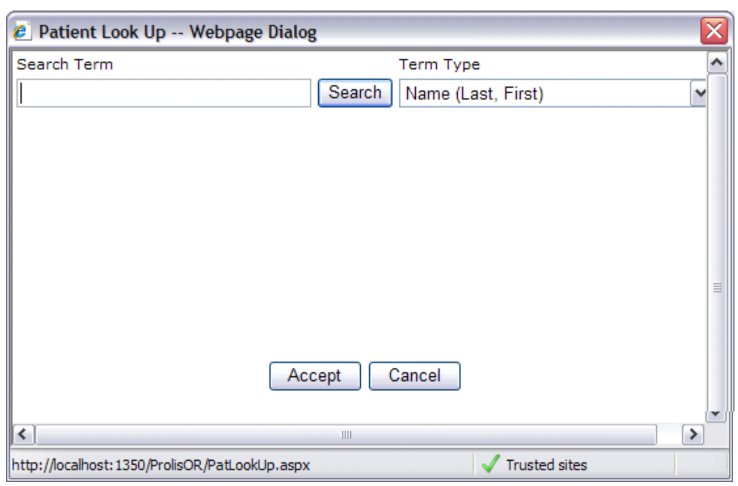
The pull and paste is of course, the easiest and the fastest but it is possible only if the patient already exist in the system. If the patient does not exist in the laboratory system, you have no choice but to enter the data manually field by field.

## Procedure Manual entry

Enter information in all fields if possible. Fields labeled red are required fields. That means, system won't save any information if any of the required information is missing.
Fields labeled pink, are conditionally required. That means, if the laboratory has to bill to the patient for her services then the patient address becomes required otherwise not.
Since you are entering the patient in the context of a accession, it is required that you provide at least the primary diagnosis code and indicate if the patient is fasting (which is not required though).
After entering the patient information when you navigate to the next Tab, the patient section of the Progress Bar, will turn green.

## Procedure Pull and Paste

Click the button 'Patient Look Up'. You will be presented the following dialog.




Pull the patient by using the standard Prolis search as described previously on the page 6.

Using the PROLIS Search on this dialog, not only retrieves the patient data, it also retrieves the diagnosis of the patient.

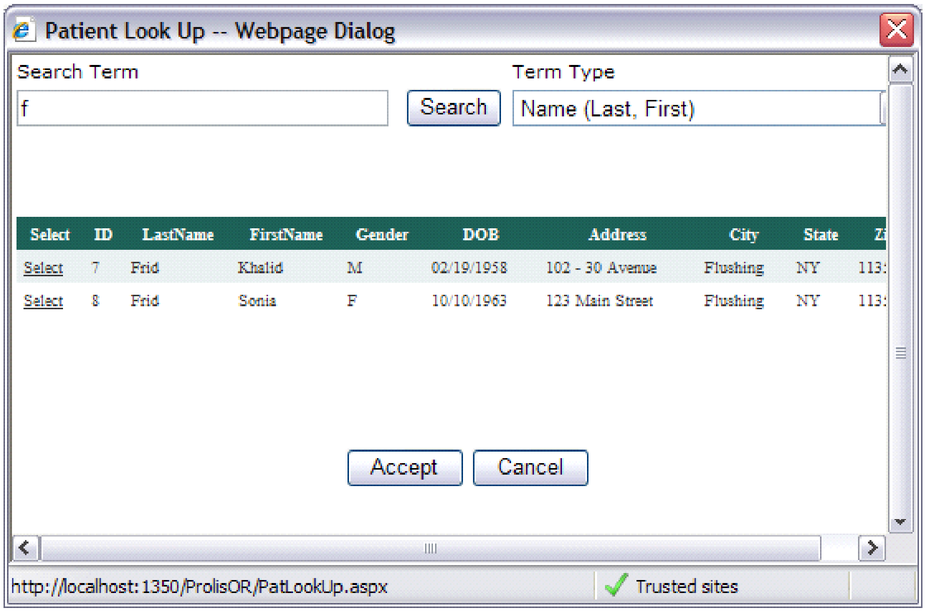
This dialog only employs the search with the Patient Name (Last, First) and the SSN.

On the next page, see the dialog with patients pulled.

After pulling the desired patient select it by clicking the Select link in front of the patient. The background color of the selected patient will turn to light brown.

Then press the button 'Accept' which will past the selected patient on the accession screen along with the diagnosis codes if any.

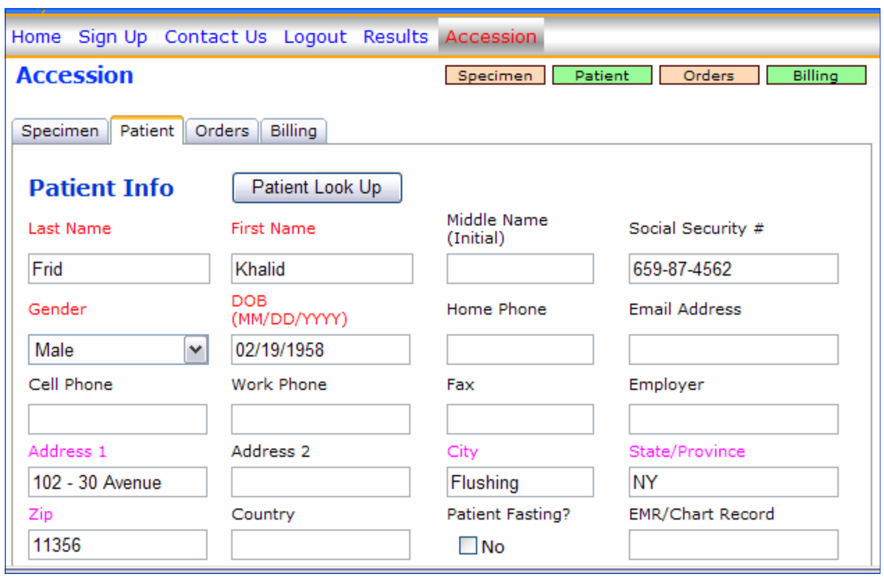
Make sure to change the pulled patient diagnosis codes according to the current visit of the patient.




Also make sure to indicate if the patient is fasting or not.

It is suggested that after the patient is pasted on the accession screen, verify the accuracy of the data, particularly if it is exactly the same patient what you intend to pull.

The billing section would have been turned green by now as this past action also pulls the billing information from the patient file and paste it on the billing screen. You must verify the billing information as well.
'

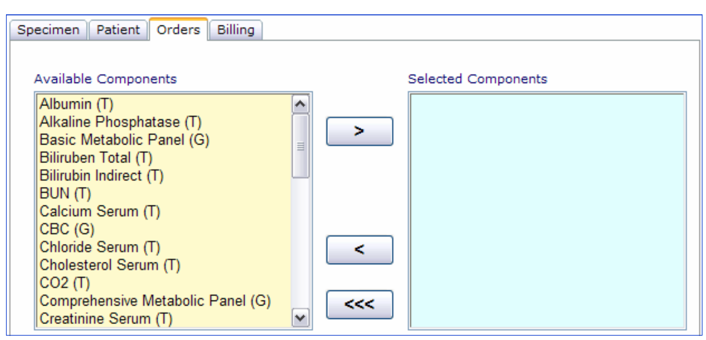



4. **Orders Tab**

The Orders Tab as shown here is comprised of a list of the available components on the left side with a light yellow background, 3 buttons '>', '<' and '<<<' notations and a list of selected components.

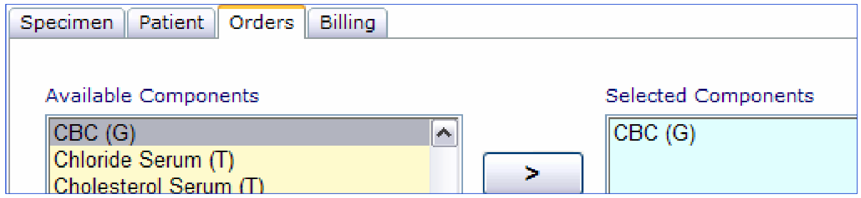
## Procedure

Select the component needed to be ordered

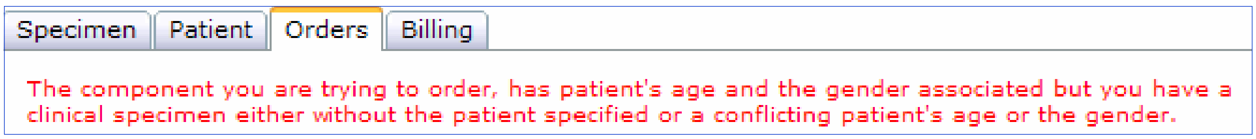


from within the left ‘Available Components’ list and click the button labeled ‘**>**‘.

If you have entered the appropriate specimen source compatible to the component being ordered and the patient has been entered, the system will insert it in the right list ‘Selected Component’, as shown.




If the patient is not been selected or the specimen source is not selected or you are trying to order a component not compatible with the patient age or the gender, the system will display the following message.

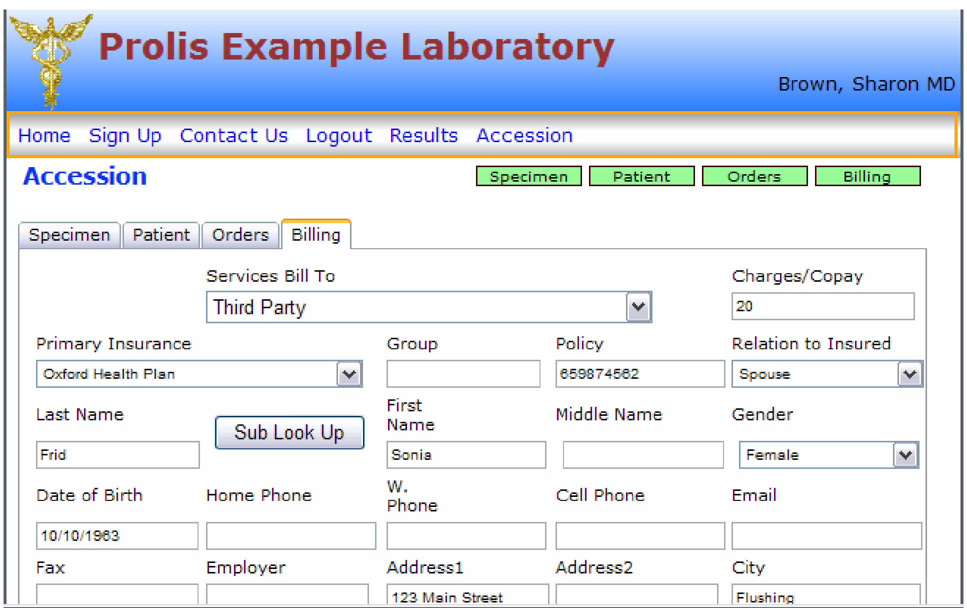



In case you need to deselect any selected component, select it from within the right ‘selected components’ list and click the button ‘**<**‘**.** If the whole list of selected components is needed to be emptied, just click the button labeled ‘**<<<**‘.

**Note:** Please contact the laboratory for any component not available in the ‘Available Components’ list.

5. **Billing Tab**

The Billing Tab provides you with the mechanism to indicate the desired billing type the laboratory is going to perform for the performed services on the specimen being submitted.




The first field in this tab is the ‘Services Bill To’ where you select the bill to party. The shown party in the snapshot is a third party. If this option is selected, then the remaining fields like ‘Primary Insurance’, ‘Policy’ and ‘Relation’ become required. If the ‘Relation’ is other than SELF then the Subscriber’s information become required. The laboratory supports the billing to the Provider (1), the third party (2) and the patient (3).
If the patient or the provider is selected as the Bill To party, remaining fields are not required.