

## ICANotes Lab Integration

***This is for Test Results Only***

*ICANotes does not submit lab test requisitions at this time*

*We hope to offer this integration in 4th quarter 2015*

To have lab results delivered into your ICANotes account, call ICANotes Sales at 866-847-3590 or email [sales@icanotes.com](mailto:sales@icanotes.com). You will also need to speak with your account representative at the laboratory to initiate the project as the lab controls the project timeline.

### ICANotes is currently working with these labs:

- LabCorp
- Quest Diagnostics
- Millennium

We can work with other labs, but will need contact information so that we can establish an interface.

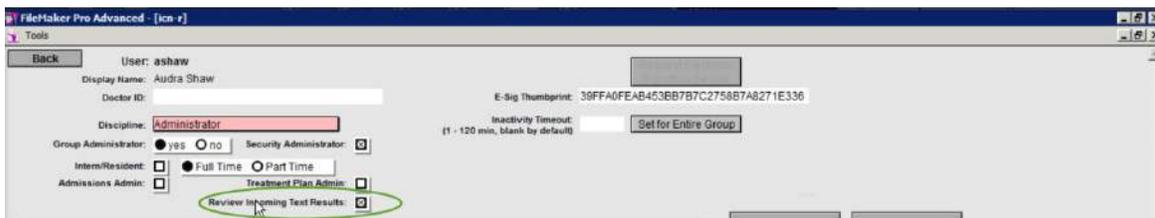
### Office Workflow with a Results Only Lab Interface:

- Office faxes (or provides via website) a test order
- Lab receives order and specimens
- Lab runs tests
- Lab sends test results to ICANotes account
- Provider (or authorized staff) initially reviews test results (looking for emergency or abnormal results)
- Doctor (only) reviews test results and pushes a button to create a Test Results Note which automatically incorporates the results
- Test results remain documented in chart note and in log (test results)

Once a lab interface has been approved, ICANotes will work with the lab to test connectivity and run sample results. Upon successful completion of these tests, ICANotes staff will arrange to train provider security administrator(s) and specified staff. Following the training, a go live date will be coordinated with the lab and the provider.

### Activating User Permissions:

Once trained, the security administrator can activate lab results functionality for users in the group. To allow users to review incoming lab results, open the Security Center in Settings & Directories. Find the user, click Edit to the right of the name, and check the box labeled "Review Incoming Test Results."



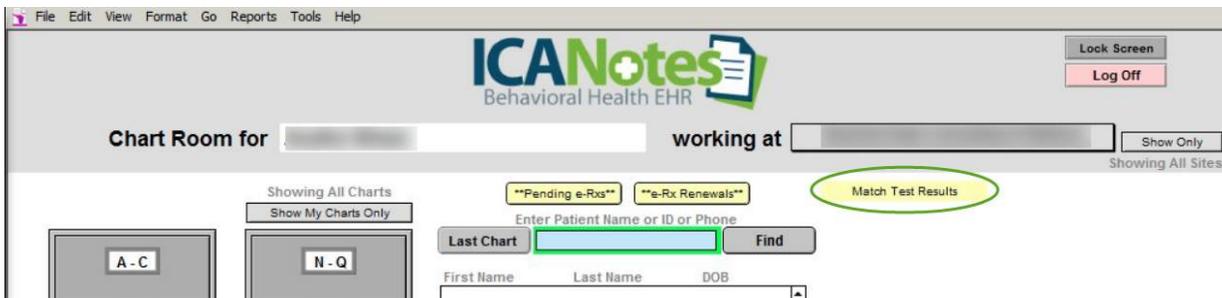
Activating this permission allows the user to review incoming test results and activates the lab integration button in the Chart Room.

If permission has not been granted, a message will appear advising the user to contact a security administrator.

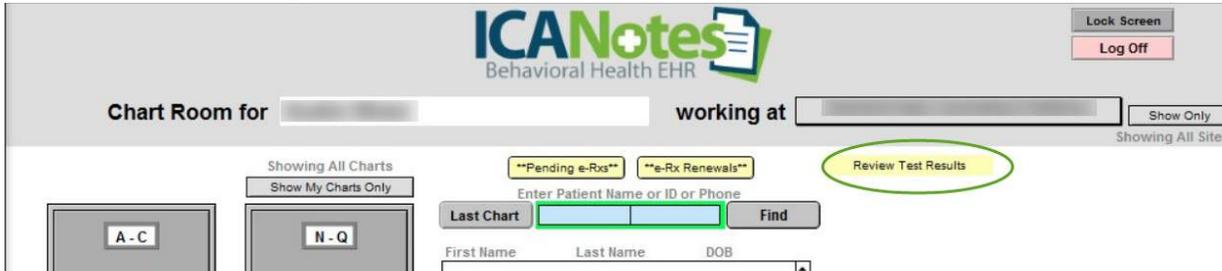
**Chart Room Buttons:** A yellow button appears at the top when a lab interface has been activated for the group. This button will be labeled in different ways depending on whether lab results have been received:

- ❑ Yellow "**Match Test Results**" = results are waiting but have not been matched with a patient (similar to auto posting)
- ❑ Yellow "**Review Test Results**" = results are available and have been matched
- ❑ Grey "**Test Results**" = no results are waiting for review

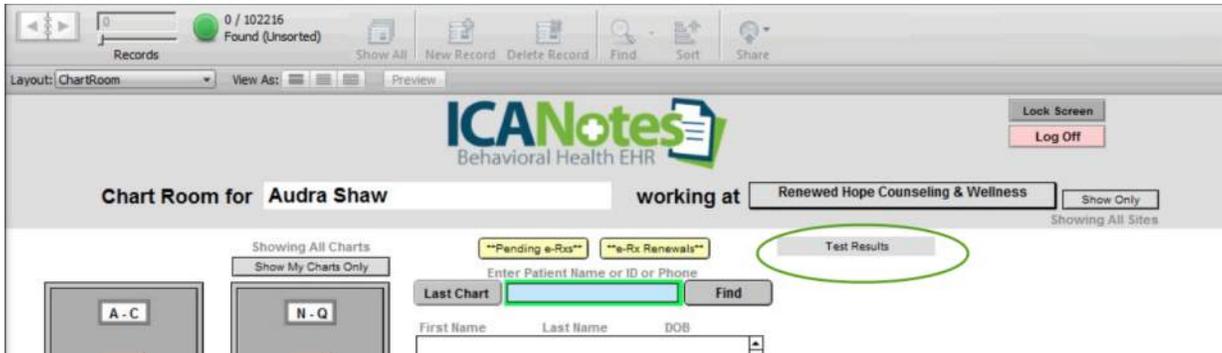
**Match Test Results** button (yellow button):



**Review Test Results** (yellow button):



**Test Results** (grey button):



## REVIEW TEST RESULTS

This is the screen that displays when you click the **Review Test Results** button from the Chart Room:

**REVIEW Incoming Test Results** MATCH Test Results

Filter by Provider  Show All

The following Test Result Messages have been received and need Final Review by a physician

Chart Room

STAFF REVIEW RX PROGRESS NOTE VIEW PDF RECORD of REPORT

Patient: Testlabcorp, Test  
DOB: 1/1/1980 Gender: Male  
ID: 070X9251000  
Ordering Provider: TEST, T  
Observation Reported: 3/11/2015 11:05 AM  
Specimen Source:  
Specimen Condition:  
Specimen: 070X9251000  
Collection Date: 3/11/2015 8:00 AM  
Specimen Received: 3/11/2015 11:03 AM  
Report Status:  
Comments:  
TSH

Filtering by provider works best for larger organizations (although it is suggested to **Show All** for best results). Filtering by provider filters by the ordering provider. In order for results to appear in this view, the patient's chart must be assigned to the ordering provider prior to the result being received.

For best results, **Show All** is suggested:

**REVIEW Incoming Test Results**

Filter by Provider  Show All

**RECORD OF REPORT:** Clicking this button will display the test result from the lab.

**REVIEW Incoming Test Results** MATCH Test Results

Filter by Provider  Show All

The following Test Result Messages have been received and need Final Review by a physician

Chart Room

STAFF REVIEW RX PROGRESS NOTE VIEW PDF RECORD of REPORT

The user has the option to review (opens the results) or print the results.

**Review OR Print Report of Record**

Would you like to REVIEW or PRINT the current Results Report of Record

Print Review

When opened, results will be color coded:

**Green** = normal patient lab results

**Pink** = abnormal patient lab results

Example of how test results display by clicking **RECORD of REPORT**:

Test Results		Report Status:	
<b>Patient Information</b>		<b>Specimen Information</b>	
Patient: <b>Testlabcorp, Test</b>		Ordering Provider: <b>TEST, T</b>	
DOB: <b>1/1/1980</b>		Specimen Source:	
Gender: <b>Male</b> Age: <b>35</b>		Specimen Condition:	
ID: <b>070X9251000</b>		Collection Date: <b>3/11/2015 8:00 AM</b>	
Comments:		Specimen: <b>070X9251000</b>	
		Total Volume:	
		Specimen Received: <b>3/11/2015 11:03 AM</b>	
		Observation Reported: <b>3/11/2015 11:05 AM</b>	

Test Name	Test Results	Reference Range / Units	Lab
<b>TSH</b>			
TSH	1.789	0.450-4.500 uIU/mL	01
Status: (F) Final			
Performing Site: 01 LabCorp EDI Testing, 3000 S Church Street Burlington, NC 27215-0000 (336)584-5171 EDI Testing.			

Test Name	Test Results	Reference Range / Units	Lab
<b>Lupus Anticoagulant Reflex</b>			
PTT-LA	88.0	0.0-50.0 sec	01
Status: (F) Final			
(H) Above High Normal			
<b>PTT-LA Mix</b>			
PTT-LA Mix	88.0	0.0-50.0 sec	01
Status: (F) Final			
(H) Above High Normal			
<b>Hexagonal Phase Phospholipid</b>			
Hexagonal Phase Phospholipid	0.9	0.0-2.0 sec	01
Status: (F) Final			
(H) Above High Normal			
<b>Lupus Anticoagulant Reflex</b>			
dRVVT	150.0	0.0-55.1 sec	01
Status: (F) Final			
(H) Above High Normal			
<b>dRVVT Mix</b>			
dRVVT Mix	1.3	0.0-45.4 sec	01
Status: (F) Final			

**STAFF REVIEW:** If desired, initial review of results can be performed by staff. Click the **STAFF REVIEW** button to indicate that the test results have been viewed by a nonclinical staff member.

## REVIEW Incoming Test Results

Filter by Provider

Show All

MATCH Test Results

Chart Room

The following Test Result Messages have been received and need Final Review by a physician

STAFF REVIEW

RX PROGRESS NOTE

VIEW PDF

RECORD of REPORT

Once the **STAFF REVIEW** button has been pressed, this alert will show:

**Result Staff Reviewed**

These Test Results have been marked as initially reviewed. In order for the results to be properly noted and logged, a physician must review results by entering in Rx Progress note.

OK

If the **STAFF REVIEW** button has been clicked, the clinician will see that button displayed in green.

STAFF REVIEW

Grey **STAFF REVIEW** button = not reviewed by staff.

Green **STAFF REVIEW** button = staff has reviewed. Hovering over the button will indicate who reviewed the results and when.

The following Test Result Messages have been received

**STAFF REVIEW** **RX PRO**

Patient: **test. Test**  
 DOB: **10/1** Staff Reviewed By:  
 ID: **06496** Marianne Magsaysay, Op  
 Ordering P: **3/27/2015 1:18:35 PM**  
 Observation Reported: **3/5/2015 11:05 AM**

**VIEW PDF:** Clicking this button allows the reviewer to see the PDF report generated by the lab. Anyone who has the appropriate permission can view the PDF document. Please note that not all lab interfaces include a PDF report.

**REVIEW Incoming Test Results** **MATCH Test Results**

Filter by Provider  **Show All**

The following Test Result Messages have been received and need Final Review by a physician

**STAFF REVIEW** **RX PROGRESS NOTE** **VIEW PDF** **RECORD of REPORT** **Chart Room**

**RX PROGRESS NOTE:** When the clinician clicks the RX PROGRESS NOTE button, a prescriber progress note will be created and the lab test results will be automatically populated in the note.

**REVIEW Incoming Test Results** **MATCH Test Results**

Filter by Provider  **Show All**

The following Test Result Messages have been received and need Final Review by a physician

**STAFF REVIEW** **RX PROGRESS NOTE** **VIEW PDF** **RECORD of REPORT** **Chart Room**

**ICANotes** **Chart Room** **Chart face** **3/26/2015** **testlabcorp, test** **1000010497706**

Demographics **PN, part 1** **PN, part 2** **PN (Non Rx)** **Group Therapy** **Nursing PN** **Play Therapy** **35 Yrs 1/6/1980** **Make A New Note For This Patient**

**PROGRESS NOTE, PRESCRIBER: PART 1: WORK AREA** **Replace Text**

**All Normal** **Client attends with**

**Clinical Status / Complexity** **Start Here**

**Symptoms**

**Normal** or **PT can't describe**

**Denies ADHD** **Denies Anxiety** **Denies ASD** **Denies Dementia** **Denies Depression** **Denies Eating Dis.** **Denies H/O** **Denies OCD** **Denies ODD** **Denies Psychosis** **Denies Use** **Denies Withdraw.**

**Extended ROS** **Const. ROS Normal** **Fluorid. ROS Normal** **All other systems normal**

**See Detailed ROS** **Enter Test Results** **Behavior** **Immunizations & Screening** **PF SH Review**

**INTERVAL HISTORY:**

**Test Results Reviewed:**

Test Performed on: 3/11/2015 11:04 AM

(1) TSH: 1.789 uIU/mL (0.450-4.500)

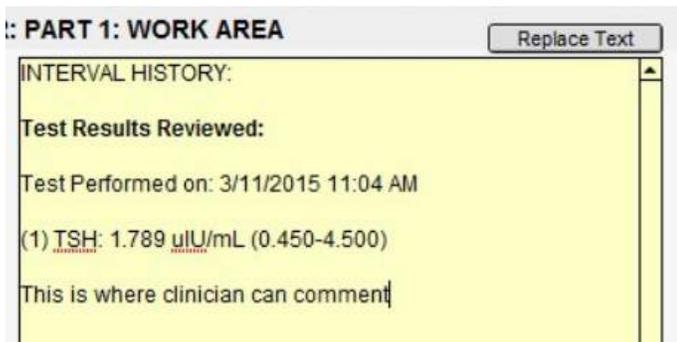
**EXAM:**

**Side Effects** **Drug Reactions** **Psychotherapy** **Rating Scales** **Exam** **Basic Physical Status** **Airway:** **Breathing:** **Circulation:** **Tubing:** **Restraints and Seclusion** **Vital Signs** **Pain** **Link to Treatment Plan** **Course During Treatment** **Set or View Reminder** **Enter Private Notes**

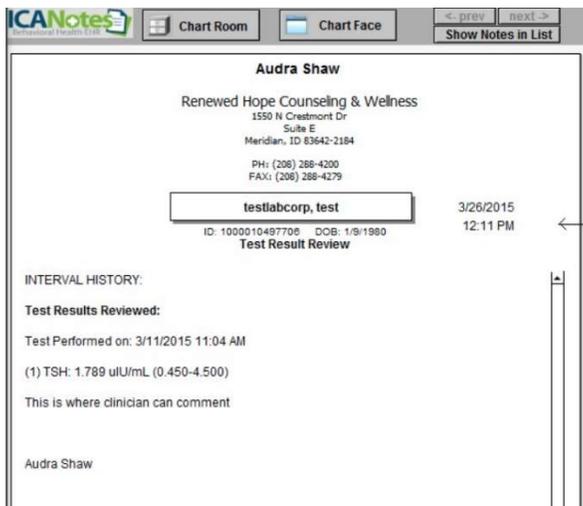
**Location** **Severity** **Timing** **Quality** **Duration** **Context** **Modifying factors** **Associated Symptoms**

Clinician: **Audra Shaw** **Note Owner: 100001** **Continue to Progress Note, part 2**

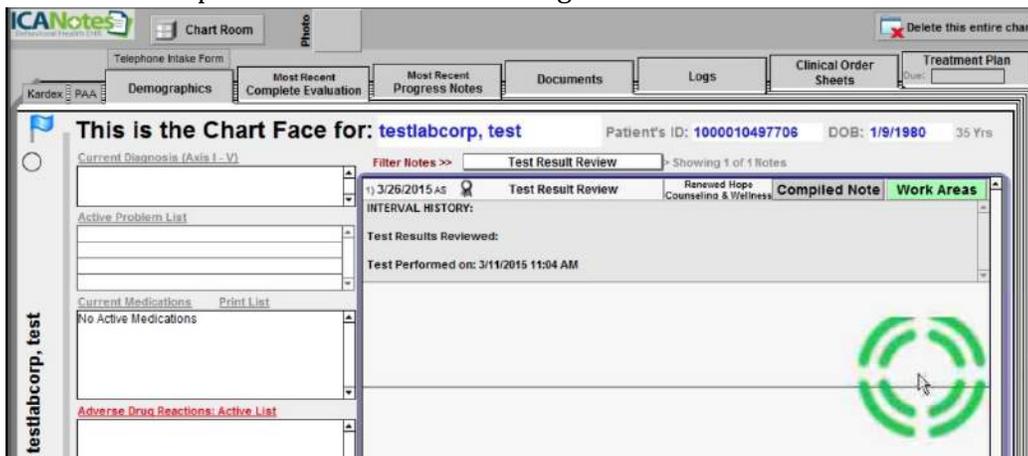
After the progress note has been created, the clinician can add comments about the test results within the note.



This is what the compiled progress note (called Test Result Review) will look like:

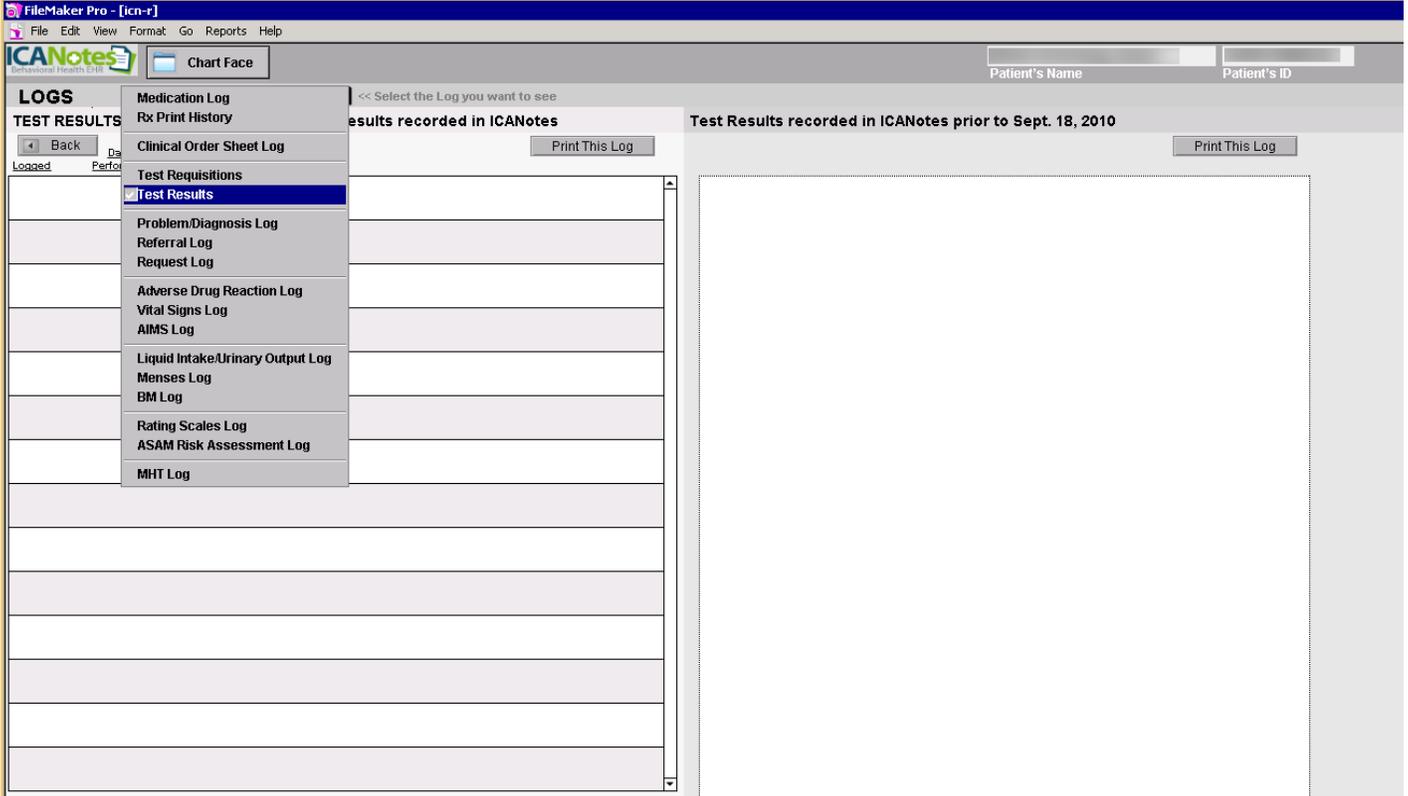


This is an example of the Chart Face showing the Test Result Review:

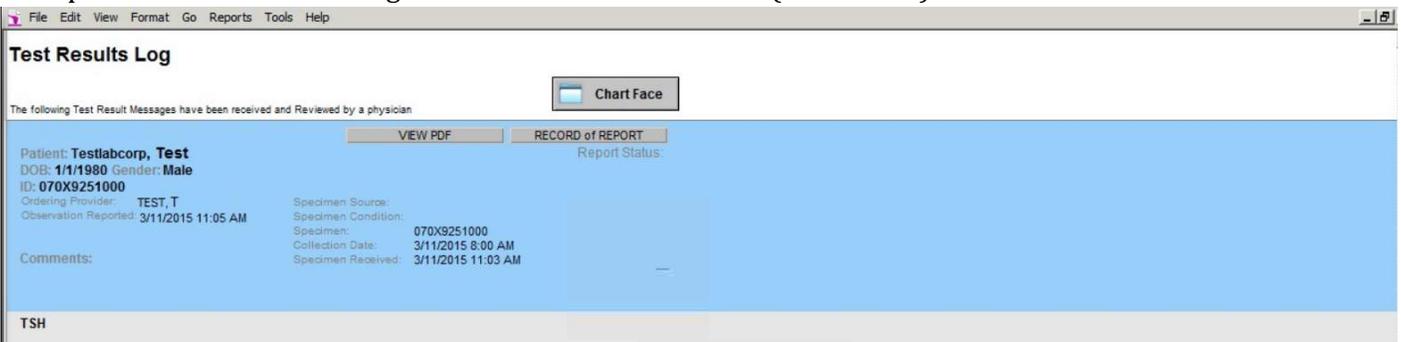


The moment the doctor clicks **RX PROGRESS NOTE**, the results will go to the Logs, where they can be reviewed by all staff, not just those that have been given permission to view lab results from the Chart Room.

Logs Tab from the Chart Face:



Example of the Test Results Log: A user can click **VIEW PDF** (if available) or click **RECORD OF REPORT**.



As soon as the clinician has clicked the **RX PROGRESS NOTE** button, the results are no longer available in the Review Incoming Test Results window. If all test results have been reviewed by the clinician and moved to the Test Results Review report (RX Progress Note), the Chart Room button will be grey and the Review Incoming Test Results window is no longer available (until new lab results arrive).

## MATCH TEST RESULTS

The lab integration engine does a four-point match (First Name, Last Name, DOB, SSN). If it cannot find a direct match with these four data points, the result will be sent to the group to match manually.

Press the **Match Test Results** button from the Chart Room (or from **MATCH Test Results** on the REVIEW Incoming Test Results screen). Listed in the left column are **Unmatched Test Results**, all tests that the integration engine was unable to match to an existing patient.

Select a patient from the left side and the patient demographics populate into the middle column, **Search for Patients**. You can then use the checkboxes to filter by first name, middle name, last name, DOB, SSN, or provider and then click the **SEARCH** button to attempt a match.

In this example, the first name was used to search. In the right column, **Match Test Result with Patient**, the search results pulled up all patients with the first name of "Test".

After the patient is matched via the demographic data, clicking the MATCH button by the correct patient associates the test with that patient and removes the test result from the Unmatched Test Results column. A Match Confirmation window will populate.

**Note:** Each Unmatched Test Result will need to be individually matched to the correct patient. If any of the results cannot be matched to a current patient, the lab should be contacted.