

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. 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.

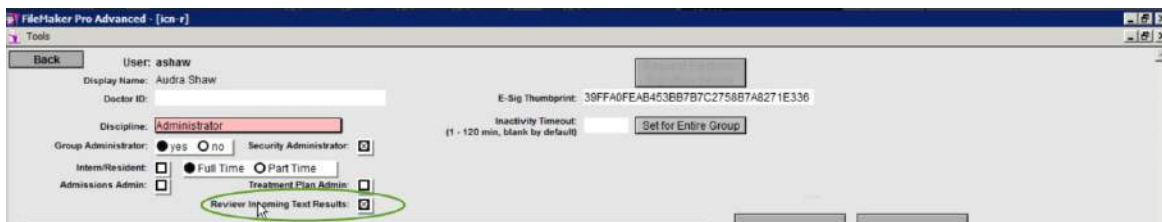
Office Workflow with a Results Only Lab Interface:

- ☐ 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."



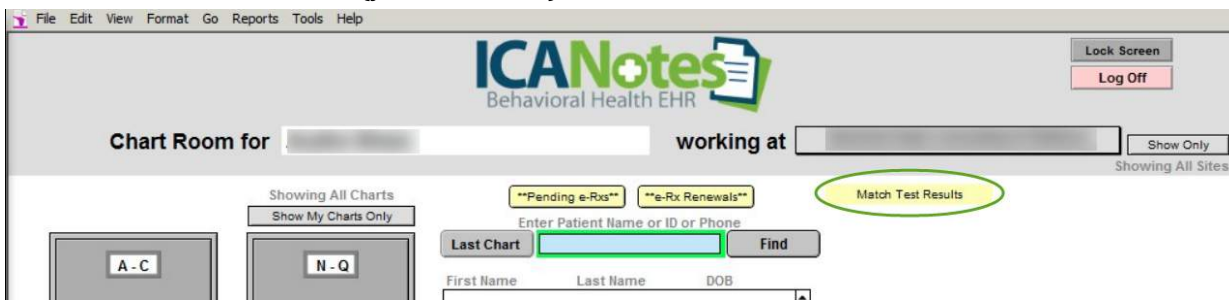
Activating this permission allows the user to review incoming test results and activates the lab integration button in the Chart Room.

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

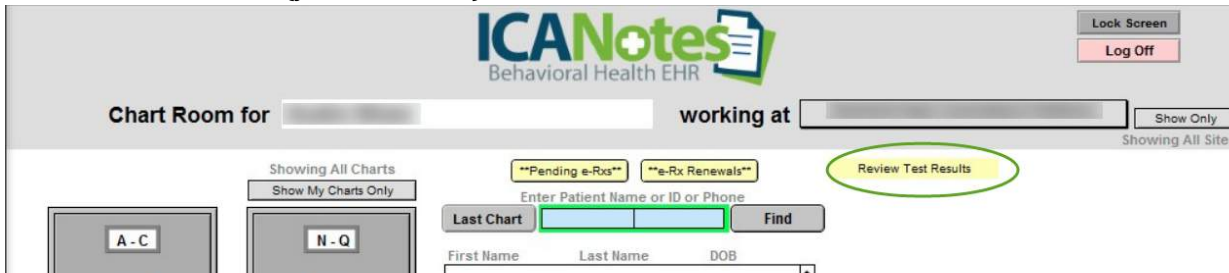
Chart Room Buttons: A yellow button appears at the top when a lab interface has been activated for the group. This button will be labeled in different ways depending on whether lab results have been received:

- ☐ 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

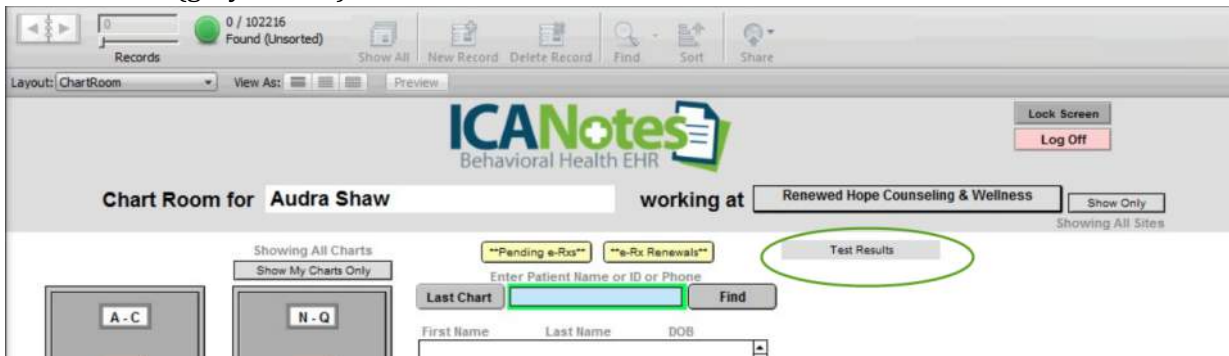
Match Test Results button (yellow button):



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:

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:

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

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

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:	
Patient Information Patient: Testlabcorp, Test DOB: 1/1/1980 Gender: Male Age: 35 ID: 070X9251000 Comments:		Specimen Information Ordering Provider: TEST, T Specimen Source: Specimen Condition: Collection Date: 3/11/2015 8:00 AM Specimen: 070X9251000 Total Volume: Specimen Received: 3/11/2015 11:03 AM Observation Reported: 3/11/2015 11:05 AM	
Test Name TSH			
TSH		Test Results 1.789	Reference Range / Units 0.450-4.500 uIU/mL
Status: (F) Final		Lab 01	
Performing Site: 01 LabCorp EDI Testing, 3060 S Church Street Burlington, NC 27215-0000 (336)584-5171 EDI Testing.			

Test Name: Lupus Anticoagulant Reflex			
PTT-LA	Test Results	Reference Range / Units	Lab
	88.0	0.0-50.0 sec	
Status: (F) Final (H) Above High Normal 01			
Test Name: PTT-LA Mix			
PTT-LA Mix	Test Results	Reference Range / Units	Lab
	88.0	0.0-50.0 sec	
Status: (F) Final (H) Above High Normal 01			
Test Name: Hexagonal Phase Phospholipid			
Hexagonal Phase Phospholipid	Test Results	Reference Range / Units	Lab
	0.9	0.0-5.0 sec	
Status: (F) Final (H) Above High Normal 01			
Test Name: Lupus Anticoagulant Reflex			
dRVVT	Test Results	Reference Range / Units	Lab
	100.0	0.0-55.1 sec	
Status: (F) Final (H) Above High Normal 01			
Test Name: dRVVT Mix			
dRVVT Mix	Test Results	Reference Range / Units	Lab
	1.3	0.0-45.4 sec	
Status: (F) Final 01			

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

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

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.

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

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

Patient: **Test, Test**

DOB: 10/1

ID: 06496

Ordering P

Observation Reported: 3/5/2015 11:05 AM

Staff Reviewed By:
Marianne Magsaysay, Op
3/27/2015 1:18:35 PM

RX PRO

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 not that not all lab interfaces include a PDF report.

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

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

Filter by Provider
 Show All

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

MATCH Test Results

Chart Room

STAFF REVIEW

RX PROGRESS NOTE

VIEW PDF

RECORD of REPORT




Chart Room

Chart Face

3/26/2015

Notes Only

EPISODE: testabcorp, test

Patient's Name

35 Yrs 1/6/1980 Patient's ID

100001049770

Demographics

PN, part 1

PN, part 2

PN (Non Rx)

Group Therapy

Nursing PN

Play Therapy

Make A New Note For This Patient

Simplified Layout

Delete This Note

PROGRESS NOTE, PRESCRIBER: PART 1: WORK AREA

All Normal

Clinical Status / Complexity

Low Complex

Mod Complex

High Complex

Start Here

Symptoms

Normal

PT can't describe

Denies ADHD

Denies Anxiety

Denies ASD

Denies Dementia

Denies Depression

Denies Eating Dis.

Denies Phobia

Denies OCD

Denies ODD

Denies Psychosis

Denies Use

Denies Withdrawn

Extended ROS

Compl. ROS

Condit. ROS Normal

Pharmacol. ROS Normal

See Detailed ROS

Enter Test Results

Behavior

Immunizations & Screening

PFSH Review

All other systems normal

Interval History

Test Results Reviewed:

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

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

Replace Test

EXAM:

Replace Test

Side Effects

Drug Reactions

None

Psychotherapy

Rating Scales

Exam

Normal

Basic Physical Status

All Normal

Airway:

Breathings:

Circulation:

Tubing:

Restraints and Seclusion

Vital Signs

Not taken

Pain

Link to Treatment Plan

Course During Treatment

Set or View Reminder

Enter Private Notes

Client attends with

Create New Interval History Button

Location

Severity

Timing

Quality

Duration

Context

Modifying factors

Associated Symptoms

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.

PART 1: WORK AREA Replace Text

INTERVAL HISTORY:

Test Results Reviewed:

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

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

This is where clinician can comment

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

ICANotes Chart Room Chart Face < Prev Next > Show Notes in List

Audra Shaw

Renewed Hope Counseling & Wellness
1550 N Crestmont Dr
Suite E
Meridian, ID 83642-2184
PH: (208) 288-4200
FAX: (208) 288-4279

testlabcorp, test 3/26/2015 12:11 PM
ID: 1000010497706 DOB: 1/9/1980
Test Result 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)

This is where clinician can comment

Audra Shaw

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

ICANotes Chart Room Photo Delete this entire chart

Telephone Intake Form Most Recent Complete Evaluation Most Recent Progress Notes Documents Logs Clinical Order Sheets Treatment Plan

This is the Chart Face for: testlabcorp, test Patient's ID: 1000010497706 DOB: 1/9/1980 35 Yrs

Filter Notes >> **Test Result Review** Showing 1 of 1 Notes

1) 3/26/2015 AS **Test Result Review** **Renewed Hope Counseling & Wellness** **Compiled Note** **Work Areas**

INTERVAL HISTORY:

Test Results Reviewed:

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

Current Medications Print List
No Active Medications

Adverse Drug Reactions: Active List

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.