

# **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 <u>sales@icanotes.com</u>. 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."

FileMaker Pro Advanced	[icn-r]			- 6 ×
Tools				_[6] ×
Back User: Display Name: Doctor ID:	ashaw Audra Shaw	E-Sig Thumbprint 39FF	A0FEAB453BB7B7C2758B7A8271E336	-
Discipline. Group Administrator InterniResident:	Administrator                • yes             • no             • Full Time             • Part Time	Inactivity Timeout (1 - 120 min, blank by default)	Set for Entire Group	
Admissions Admin:	Treatment Plan Admin     Review Incoming Text 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):

T File Edit View Format Go Reports Tools Help	-	
	ICANOTES Behavioral Health EHR	Lock Screen
Chart Room for	working at	Show Only Showing All Sites
Showing All Charts Show My Charts Only A - C N - Q		
Review Test Results (yellow but	tton):	
	ICANOTES Behavioral Health EHR	Lock Screen
Chart Room for	working at	Show Only Showing All Sites
Showing All Charts	**Pending e-Rxs** ***** Renewals** Review Test Results	

# Test Results (grey button):

Records 0 / 102216 Found (Unsorted) Show Al	New Record Delete Record Find Sott	
Layout: ChartRoom   View As:   Pr	eview	
		Lock Screen
Chart Room for Audra Shaw	working at kenewe	Show Only Showing All Sites
Showing All Charts Show My Charts Only	**Pending e-Rxs**     **e-Rx Renewals**       Enter Patient Name or ID or Phone       Last Chart     Find       First Name     Last Name	Fest Results



# **REVIEW TEST RESULTS**

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

STAFF REVIEW         RX PROGRESS NOTE         VIEW PDF         RECORD of REPORT           ratient: Testlabcorp, Test         Report Status:         Report Status:           OB: 1/1/1980 Gender: Male         Specimen Source:         Report Status:           O: 070X9251000         Specimen Source:         Specimen:         070X9251000           Indexing Provider:         TEST, T         Specimen Condition:         Specimen:         070X9251000           Collection Date:         3/11/2015 8:00 AM         Specimen Received:         3/11/2015 11:03 AM	ter by Provider Show All following Test Result Messages have been receive	d and need Final Review by a	physician	Chart Room
Atlient: Testlabcorp, Test Report Status: IOB: 1/1/1980 Gender: Male D: 070X9251000 Indering Provider TEST, T Specimen Source: Ibservation Reported: 3/11/2015 11:05 AM Specimen Condition: Specimen Condition: Specimen 20/12/2015 12:05 AM Collection Date: 3/11/2015 8:00 AM Collection Date: 3/11/2015 11:03 AM	STAFF REVIEW RX PROGR	ESS NOTE V	IEW PDF	RECORD of REPORT
	Attient: Testlabcorp, Test OB: 1/1/1980 Gender: Male 0: 070X9251000 Wdering Provider: TEST, T Observation Reported: 3/11/2015 11:05 AM	Specimen Source: Specimen Condition: Specimen: Collection Date: Specimen Received:	070X9251000 3/11/2015 8:00 AM 3/11/2015 11:03 AM	Report Status:
				4

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.

<b>REVIEW</b> Incomin	g Test Results		MATCH Test Results
Filter by Provider Show The following Test Result Messager	- v All s have been received and need Final Re	view 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.



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:	Lupus Anticoagulant Reflex			
Patient Information	Specimen Informa	ation			Test Results	Reference Range / Units	Lab
Patient: Testlabcorp, Test DOB: 1/1/1980	Ordering Provider: Specimen Source:	TEST, T		PTT-LA Status: (F) Final Test Name	88.0	0.0-50.0 sec (H) Above High Normal	01
Gender: Male Age: 35 ID: 070X9251000	Collection Date: Specimen:	3/11/2015 8:00 AM 070X9251000		PTT-LA Mix	Test Results	Reference Range / Units	Lab
Comments:	Total Volume: Specimen Received:	3/11/2015 11:03 AM		PTT-LA Mix Status: (F) Final	55.0	0.0-50.0 sec (H) Above High Normal	01
	Observation Reported	. 37112013 11.05 All		Test Name Hexagonal Phase Phospholipid	Test Besuits	Reference Reason / Units	Lab
Test Name TSH				Hexagonal Phase Phospholipid Status: (F) Final	8.9	(H) Above High Novaal	01
TSK	Test Results 1.789	Reference Range / Units 0.450-4.500 uIU/mL	Lab	Test Name Lupus Anticoagulant Reflex			
Status: (F) Final			01	dRVVT	150.0	0.0~55.1 sec	Lab
Performing Site: 01 LabCorp EDI Testing, 3	3060 S Church Street Burlington, NC 27	7215-0000		Status: (2) Final		(H) Above High Normal	01
(338)584-5171 EDI Testing,				Test Name dRVVT Mix			
					Test Results	Reference Range / Units	Lab
				dRVVT Mix	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.

<b>REVIEW Incoming Test Results</b>		MATCH Test Results
Filter by Provider Show All The following Test Result Messages have been received and need Final Re	view by a physician	Chart Room
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. Progress note.	In order for the results to be properly noted and logged, a physician must review results by entering in Rx
	ОК

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	rece
		a second of the second s				



**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		MATCH Test Results
Filter by Provider Show The following Test Result Messages	All have been received and need Final Re	eview by a physician	Chart Room
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.

Show /	All ave been received and need Final Re-	view by a physician	Chart I
STAFF REVIEW	RX PROGRESS NOTE	VIEW PDF	RECORD of REPOR
	m Chart Face 3/26/2011	5 Emiscres testiabcorp, test	1000010497706
Demographics PN, PROGRESS NOTE. PRESCRIEER All Normal Clinical Status / Complexity 7 Low Complex Hod Complex Hod Complex Start Here Start Here	Part 1 PH, part 2 PH (Non Rx) Group : PART 1: WORK AREA Replace INTER/AL HISTORY, Test Results Reviewed: Test Performed on: 3/11/2015 11:04 AM	Text Side Effects Drug Reactions Busine Psychotherapy Patherapy Pa	Vale A New Note For The Patent Singlifed Laycool Delete The Note Client atteads with
Symptoms           Iternal         def from t describe.           Detect AND         or (ise ist)           Detect AND         or (ise ist)           Detect AND         or (ise ist)           Detect And and the second	(1) <u>TSH</u> : 1739 <u>y</u> [UmL (0.450-4.500)	Exam Basic Physical Status All Normal Beaching: Croulation: Croulation: Croulation: Croulation: Croulation: Croulation: Croulation Status Restraints and Seclusion	
Denies Psychols or an in Denies Use or Sex ist Desies Withdraw, or Sex ist Estended ROS Compl. ROS Constit. ROS Normal Psychols Normal	Exat	Vital Signs	Create New Interval History Button
See Detailed ROS Enter Test Results Behavior Immunizations & Screening		Link to Treatment Plan Course During Treatment Set or View Reminder	Severity Timing Quality Durstion



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:

📷 FileMaker Pro - [i	cn-r]						
🤺 File Edit View	Format Go Reports Help						
	Chart Face				Patient's Name	Patient's ID	-
LOGS	Medication Log	Select the Log you want to see					
TEST PERINTS	Rx Print History	sults recorded in ICANetes		Test Results recorded in ICANotes price	arta Sant 18 2010		
TEST RESULTS	,	esuits recorded in icAnotes		rest Results recorded in iteAnotes price	51 to Sept. 18, 2010		
Back Da	Clinical Order Sheet Log	Print This	Log			Print This Log	
<u>coggeo</u> <u>reno</u>	Test Requisitions						
	∠Test Results		П				
	Problem/Diagnosis Log Referral Log Request Log						
	Adverse Drug Reaction Log Vital Signs Log AIMS Log						
	Liquid Intake/Urinary Output Log Menses Log BM Log						
	Rating Scales Log ASAM Risk Assessment Log						
	MHT Log						
			*				

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

i File Edit View Format Go Reports Tools Help					
Test Results Log					
The following Test Result Messages have been received	d and Reviewed by a physician	Chart Face			
Patient: Testlabcorp, Test DOB: 1/1/1980 Gender: Male ID: 070X9251000 Ordering Provide: TEST, T Observation Reported 3/11/2015 11:05 AM Comments:	VEW PDF REC Specimen Source: Specimen Condition: Specimen Condition: Cellection Date: 3/11/2015 11:03 AM Specimen Received: 3/11/2015 11:03 AM	ORD of REPORT			
TSH					

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 <u>Unmatched Test Results</u>, 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, <u>Search for</u> <u>Patients</u>. 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.

est Results Patient Match	hart Room		Back to Test Results	Test Results Patient Matching Process Guidelines
Inmatched Test Results to following Test Result Messages vice not been matched to a journent Patient	Select one :	or Patients or more checkbox to Sear	Match Test	Result with Patient stents match the selected search oriteria
Test Editest		[ Test Result Details First Name Middle Name Last Name Editest	SEARCH	
Test Editest         REMOVE           DGB:         10/1/2001         SN:         123456789           Ordering Provider:         D         HIPPOCRAT           Test Name:         Test ID:         Specimen Received Date:           01         LabCorp Builington, 1447 York Court Burlington, NC 27215-3304 (600)762-4344 William F Hencode, MD 02 EDI Testing Lab. 865 Anywhere.	C C C C C C C C C C C C C C C C C C C	10/1/2001 SSN 123456789 Provider D HIPPOCRAT Test Name		
Test Editest REMOVE			View PDF	



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

nmatched Test Results e following Test Result Messages	Search for Patients	Match Test Result with Patient
ve not been matched to a current Patient Test Editest  COB: 10/1/2001  SSN: 123456789  URDPOCRAT	Select one or more checkbox to Search Patient Ri SEARCH Test Result Details	ecords The following Patients match the selected search oriteria Test Editest DOB: 10/1/2001 Clinician: Audra Shaw
est Name: est Name: est ID: peoimen Received Date:	filter by First Name Test Middle Name	test testlabcorp MATCH DOB: 1/9/1980 Clinician: Audra Shaw
1 EDI Testing Lab. 555 Anywhere Street Anywhere, IC 27215-0000 (338)555-0001 Testing Pathologist, ID Fest Editest <u>REMOVE</u> 208: 10/1/2001 SSN: 123456789	Last Name Editest DOB 10/1/2001	
Indering Provider: D HIPPOCRAT est Name: est ID: peoimen Received Date: 1 LabCorp Burlington, 1447 York Court Burlington, NC 215-3301 (800722-4344 William F Hancock, MD	Destrict of the second	
2 EDI Testing Lab, 555 Anywhere Street Anywhere,     Cest Editest     REMOVE     DOB: 10/1/2001 SSN: 123456789     Dideing Provider: D HIPPOCRAT     Test Name:     rest ID:     specimen Received Date:	View PDF	

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 <u>Unmatched Test Results</u> column. A Match Confirmation window will populate.

Match Confirmatio	n	
Please confirm that y	you wish to Match The Test Result of:	
Test Editest 10/1/2001 D HIPPOCRAT to the Patient:	L <sub>3</sub>	
Test Editest 10/1/2001		
		Cancel OK

**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.