

Laboratory Ordering With ATLAS version 19

Electronic Ordering with the Patient Centric Repository
and Instrument Ready Foreign Barcodes

What's is ATLAS?

- Electronic Laboratory ordering System that is linked with Beaumont's Hospital Information System (HIS)
- Sends E-Orders directly to the laboratory
 - Atlas electronically sends an "E-Order" of the requesting test to Beaumont Laboratory computer system.
- Contains a centralized database of Beaumont Health patients, their demographics and insurance information

What's is the ATLAS PCR?

- An electronic database of patient records - the *Patient Centric Repository* (PCR)
 - Creates one continuous patient record that contains all the patient's lab reports ordered from your office, previously reports were not linked to each other.
 - Gives the physician the ability to review cumulative data on the patient from within Labworks.
 - Allows lab orders to be sent electronically from the client office directly to the Beaumont Laboratory computer system

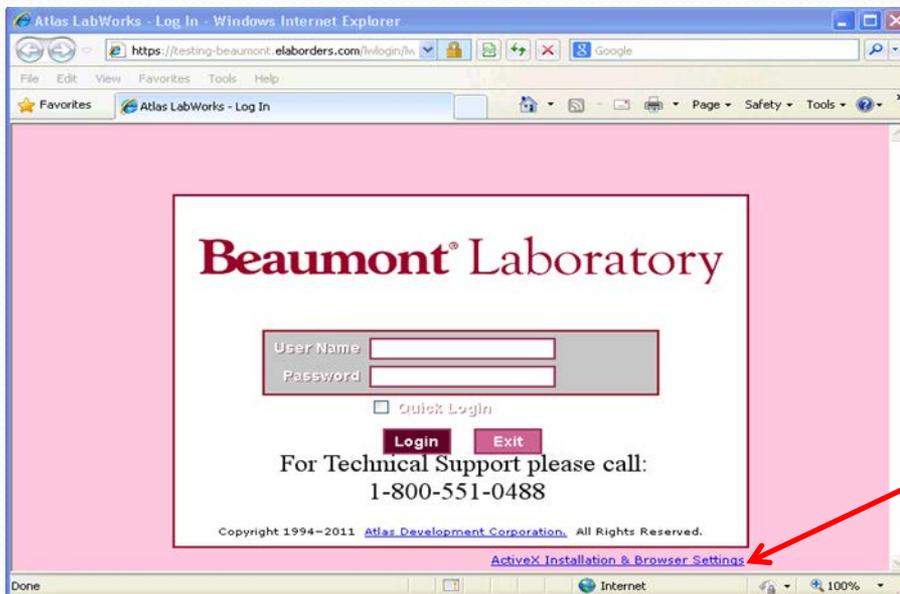
ATLAS User Notes

Diagrams, pictures, screen shots and system look and feel may vary in your LIVE system as compared to this demonstration.

- Screen colors will probably be different from those pictures – this is a deliberate difference between your LIVE system and the TEST (training and development) system from which these images were captured.
- Drop down menus may be slightly different depending on user security settings – users may not have access to all functionality within each menu – this is an intentional feature of the system.

System Requirements

- Microsoft Operating System Windows 7.0 or later.
- Internet Explorer Version 9 or later
- Active X installation
 - Link on sign in page to install Active X
 - Pop-up blocker needs to be turned off



Link to install Active
X

The Patient Centric Repository (PCR)

- The Patient Centric Repository (PCR) is a database that contains the demographics and insurance information of the patients who have utilized the Beaumont Health system.
- When an Atlas request to retrieve the patient data from the PCR is processed, Atlas pulls the selected patient demographics and insurance information from the PCR files into the client's Atlas account files.
- The user must verify the demographic and insurance information and in the case of nonmatching information either update their account's files to match the PCR data or proceed with non-updated data.
- In order to maintain integrity in the PCR, users cannot edit information contained within the PCR.
- Patient files retrieved from the PCR can be identified because they have a BRL MRN ~ **The Beaumont Medical Record Number**

The Patient Centric Repository (PCR)

- Important points about the PCR Process
 - **User must retrieve the correct patient record by verifying that the key “Patient Identifiers” match**
 - Information contained within the PCR cannot be edited by the user. Only Beaumont Registration Department can change information in a Beaumont Patient Record.
 - If the Atlas user finds the Beaumont information needs to be updated they should send copies of the new information to the laboratory with the orders.

How to use the PCR

- Begin with Patient Search
- If your patient is in your system, **and has a BRL MRN # associated with their file** – you are all set, just complete your order like you always have done.
- But what if my patient isn't found in my site database?



Acquiring a Patient from the PCR

- When your patient is not found in your site files, a message displays.

The screenshot shows the Atlas LabWorks Patient Search interface. The search criteria are: Patient: ATLASSOFT.GORILLA. The search results table is empty. A dialog box titled "Atlas LabWorks" is displayed in the center, with the following text: "Your search found no patient records in this site. Would you like to search the Patient Centric Repository for matching patient records?" The dialog box has "Yes" and "No" buttons.

The interface includes a navigation menu with options: Patients, Orders, Results, Master Files, System, Help, Previous, and Log Out. The search criteria fields are: Patient: ATLASSOFT.GORILLA, Prim. Phys:, DOB-Age: SSN:, ID: Gender:.

The search results table has the following columns: BRL MRN#, Name, SITE PID, DOB, Gender, City, Primary Physician.

The Patient QuickLinks section includes: Reports, Cumulative Reports, Order History, Demographics, New Order, New Standing Order, and Show More Links.

The bottom of the interface has buttons for: New Patient, Demographics, Search In PCR, New Standing Order, and New Order.

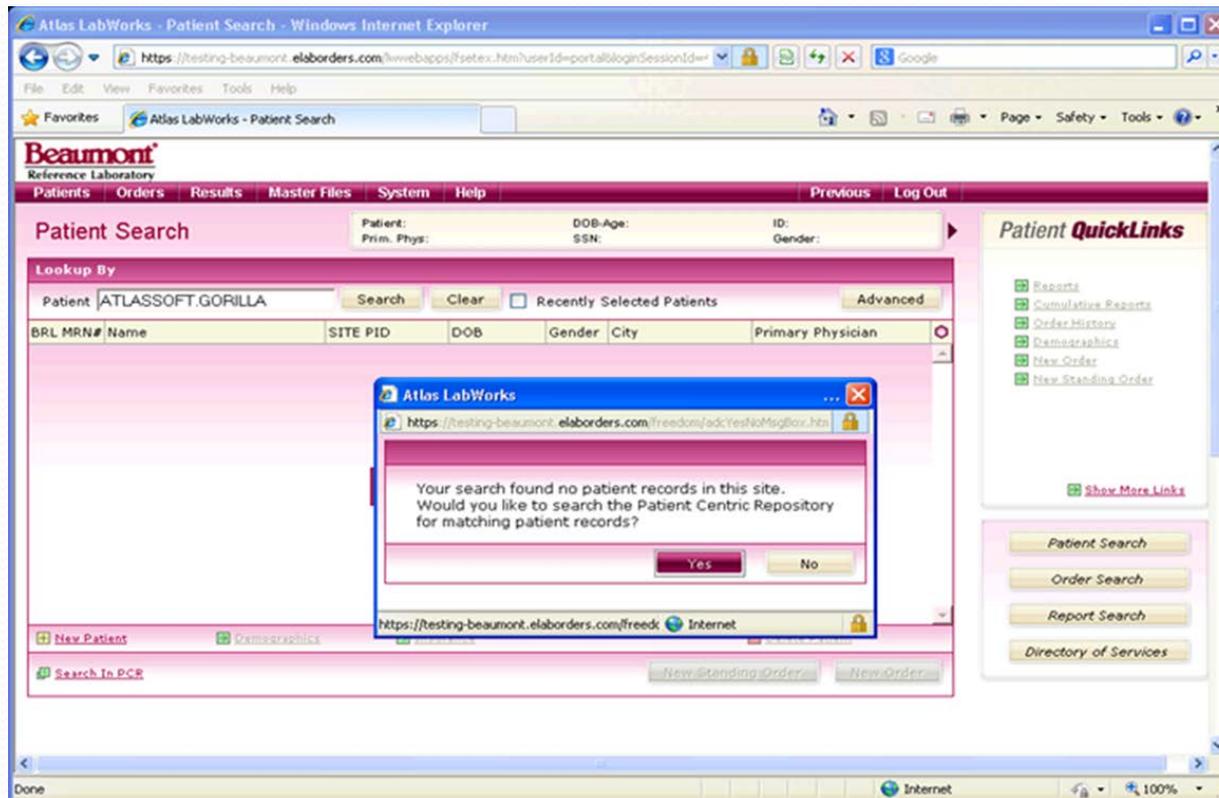
Acquiring a Patient from the PCR

- The message states that no matching record was found in the site, and asks if you wish to search the PCR for matching patient records
 - Click the yes button to begin the search
 - The PCR will be accessed
 - Patients matching the entered criteria will display
 - Match the “Identifiers”
 - Acquire the patient
 - Continue the order process



Now let's work through it!

- Patient Search for “Atlassoft, Gorilla, no patient is found in the site and the message to search the PCR displays.



I said “Yes” to search the PCR, now what do I do?

- A box will display showing you patients in the PCR who match your search criteria. In the picture below we searched just for the last name “Atlassoft”

Patient Centric Repository Patients						
Name	MRN	DOB	Gender	PCR ID	City	Phone Number
ATLASSOFT,A	6001545	07/01/1970	Male	ALES00848	GARDEN CITY	(735)5551212
ATLASSOFT,ALLIGATOR	6002023	07/01/1972	Male	ALES00948	GARDEN CITY	(734)5554321
ATLASSOFT,B	6001546	07/02/1970	Female	ALES00849	TROY	(248)1234567
ATLASSOFT,BUTTERFLY	6002024	07/02/1972	Female	ALES00949	TROY	(248)8984321
ATLASSOFT,C	6001547	07/03/1970	Male	ALES00850	STERLING HEIGHTS	(586)7183543
ATLASSOFT,CATERPILLAR	6002025	07/03/1972	Male	ALES00950	ROYAL OAK	(248)5551212
ATLASSOFT,D	6001548	07/04/1970	Female	ALES00851	ROYAL OAK	(248)9876543
ATLASSOFT,DEER / ATLASSOFT,D	6002026	07/04/1972	Female	ALES00951	ST HEIGHTS	(586)7181234
ATLASSOFT,E	6001549	07/05/1970	Male	ALES00852	CLINTON TOWNSHIP	(586)7771234
ATLASSOFT,EAGLE	6002027	07/05/1972	Male	ALES00952	CANTON TWP	(734)6651234
ATLASSOFT,F	6001550	07/06/1970	Female	ALES00853	TROY	(248)9874321
ATLASSOFT,FOX	6002028	07/06/1972	Female	ALES00953	ROYAL OAK	(248)5554321

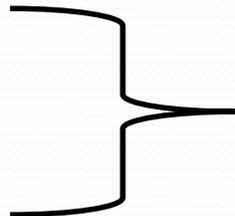
Cancel Acquire Patient

So I have a list of possible matching patients in PCR, what do I do next?

- Select the patient that exactly matches at least 3 patient identifiers.

- **Valid Patient Identifiers are:**

- Last name
- First name
- Date of Birth
- Phone number
- Gender*



These 3 identifiers must exactly match your patient's information, if any one of these identifiers are different, it is not a valid match!

*Technically not an identifier, but can be useful in confirming proper patient ID

A Word of Caution!!!

- Make **absolutely** sure you are selecting the correct patient! Because the PCR database is so large, there is a good chance that patients with similar or the same names may be present in the system.
- Remember the appropriate patient identifiers are
 - **Last Name** – Must Match Exactly
 - **First Name** – Must Match Exactly
 - **Date of Birth** – Must Match Exactly
 - **Phone Number** – This can vary
 - **Gender***

*Technically not an identifier, but can be useful in confirming proper patient ID

So Why is Proper Identification of the Patient Such a Big Deal?

- Every year, as many as 98,000 people in the U.S. die as a result of medical errors.
- The lab **cannot** change patient identification on work received – the orders must be cancelled, and the patient(s) re-drawn. This is an inconvenience to the patient(s) and delays their test results and possibly affects their treatment.
- Work submitted under an incorrect patient can lead to serious medical consequences, and could even cause irreversible harm to the patient(s) involved. Someone could even die!
- Everyone involved in the misidentification of a patient – The physician, office staff, **YOU**, can be held legally liable for any harm done.

If I know the BRL MRN #, can't I just use that to identify the patient?

Never rely on just the BRL MRN# as a form of patient identification!

- MRN #'s can change when duplicate patient records are merged
- It is easy to misread an MRN
- It is not considered a valid identifier by the lab

Valid Patient ID requires 3 positive identifier matches – always!

OK, I've found the matching patient, now what?

- Highlight that patient by clicking the line their information is on
- Click the “Acquire Patient” button

Patient Centric Repository Patients						
Name	MRN	DOB	Gender	PCR ID	City	Phone Number
ATLASSOFT,A	6001545	07/01/1970	Male	ALES00848	GARDEN CITY	(735)5551212
ATLASSOFT,ALLIGATOR	6002023	07/01/1972	Male	ALES00948	GARDEN CITY	(734)5554321
ATLASSOFT,B	6001546	07/02/1970	Female	ALES00849	TROY	(248)1234567
ATLASSOFT,BUTTERFLY	6002024	07/02/1972	Female	ALES00949	TROY	(248)8984321
ATLASSOFT,C	6001547	07/03/1970	Male	ALES00850	STERLING HEIGHTS	(586)7183543
ATLASSOFT,CATERPILLAR	6002025	07/03/1972	Male	ALES00950	ROYAL OAK	(248)5551212
ATLASSOFT,D	6001548	07/04/1970	Female	ALES00851	ROYAL OAK	(248)9876543
ATLASSOFT,DEER / ATLASSOFT,D	6002026	07/04/1972	Female	ALES00951	ST HEIGHTS	(586)7181234
ATLASSOFT,E	6001549	07/05/1970	Male	ALES00852	CLINTON TOWNSHIP	(586)7771234
ATLASSOFT,EAGLE	6002027	07/05/1972	Male	ALES00952	CANTON TWP	(734)6651234
ATLASSOFT,F	6001550	07/06/1970	Female	ALES00853	TROY	(248)9874321
ATLASSOFT,FOX	6002028	07/06/1972	Female	ALES00953	ROYAL OAK	(248)5554321

Cancel Acquire Patient

Highlight the correct patient line by clicking on it, then click the “Acquire Patient” button

Congratulations! You have successfully acquired a patient file from the PCR!

- A copy of the patient record has now been moved over to your client site database.
- You can now use this patient record to place orders in the same manner you have previously used.



I did not find my patient in the PCR or my client files, what do I do?

If you get the “No Patient Found” message, create a new patient by clicking the New Patient link

- Enter the patient demographics, Insurance and Guarantor information in appropriate fields – see the User Manual for the process.
- Send copies of the Patient’s identification and insurance cards with the lab order.

The screenshot displays the Beaumont Reference Laboratory Patient Search interface. At the top, there is a navigation bar with links for Patients, Orders, Results, User, Master Files, System, and Help, along with Previous and Log Out buttons. The main section is titled 'Patient Search' and includes a search form with fields for Patient, Prim. Phys., DOB-Age, BRLMRN, ID, and Gender. Below the search form is a 'Lookup By' section with a search box containing 'PCRTEST' and buttons for Search, Clear, and Recently Selected Patients. A table with columns for BRL MRN#, Name, SITE PID, DOB, Gender, City, and Primary Physician is shown below. A red box with the text 'No Patient Found' is overlaid on the table area. A callout box with a white background and black text points to the 'New Patient' link in the bottom left corner, stating: 'When no patient is found in PCR or client site, create a new patient by clicking the New Patient link'. The bottom of the interface features a toolbar with links for New Patient, Demographics, Insurance, Delete Patient, Show Deleted Patients, Search In PCR, and New Order.

Placing Test Orders

- Select the correct patient
- Verify patient demographics and insurance, update if necessary
- Begin order process
- Select ordering physician
- Order tests
- Select diagnosis codes
- Answer any questions associated with the test orders

Select the Correct Patient

- Patient Menu
 - Search Patients
 - Enter Last, First Names
 - Click Search
 - Verify identifiers
 - Acquire from PCR if necessary
 - **Verify demographics**
 - **Verify Insurance**

Patients Orders Results

New Patient

Patient Search

Patient: **SOFTTEST, BECKY**

Cumulative Reports

Order History

Orders Pending Results

Patient Reports

Results History

Demographics

Insurance

New Order

Patient Search

Patient: PCRTRAIN,APPLE ... DOB-Age: 03/22/1983 - 31 Y ID: ABL0999900012
Prim. Phys: BRLMRN: 6010269 Gender: Male

Lookup By

Patient PCR, APP Search Clear Recently Selected Patients Advanced

BRL MRN#	Name	SITE PID	DOB	Gender	City	Primary Physician
6010269	PCRTRAIN,APPLE MACINTOSH	ABL0999900012	03/22/1983	Male	ROYAL OAK	

Patient Demographics Screen

The Details Tab

- Required fields are in yellow
 - To update address, remove zip code first, then change address information
 - The AKA field can be useful if the patient is known in your office by a “nickname”
 - Mouse over or click on the Insurance tab to verify and edit insurance if necessary
 - Guarantor link is in lower left corner of screen, there are required fields in the guarantor box →
- Double click on the selected patient in patient search to open the patient demographics

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Patients Orders Results User Master Files System Help Previous Log Out

Patient Demographics SOFTTEST, BECKY
ID: ABL0999600... Female 03/22/1963 SSY Prim. Phys: SYKES, ELIZ...
BRLMRN: 6013799

Details Insurance Required Fields

Details

Billing Type: Insurance
Prefix: MRS
Name (L F M): SOFTTEST BECKY
Suffix:
AKA:
Marital Status:
BRL MRN #: 6013799
Patient ID: ABL0999600239 Auto Assign ID
Ordering Location:
SSN:
DOB: 03/22/1963
Primary Physician: SYKES, ELIZABETH
Gender: Female
Language:
Race:

Address: 12345 NO SUCH STREET
City: ATTICA
State: MI ZIP Code: 48412
Phone #: (248)999-9999
E-mail:
Drivers License:
Notes:
Ethnicity:

Guarantor MRN List Allergies Contacts Patient IDs Save
Audit Details Questionnaires Other Sites New Patient Patient Short Lists Unlock Forwarded Patient Patient Label New Order

Patient QuickLinks

- Reports
- Cumulative Reports
- Order History
- Demographics
- New Order
- Results History

Show More Links

Patient Search
Order Search
Report Search
Directory of Services

Patient Demographics Insurance Tab

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Patients Orders Results User Master Files Help Previous Log Out

Patient Demographics **ATUPGRADE, MICHELLE** Prim. Phys: KOLINS, MA...
ID: ALE502399 Female 09/29/1978 37Y BRLMRN: 6013725

Details Insurance

Active Insurance Providers Missing Information **MI**

Insurance Provider	Policy #	Group #	Expires	Billing Type	Pre-Approved/Local	Priority		
BCBS - BLUE CHOICE POS	ABC312654987	12345			Local	Primary		▲ ▼
AETNA - CHOICE POS II	543212	1235		Commercial	Pre Approved	Secondary		▲ ▼

Associated Insurance Providers

Insurance Provider	Policy #	Group #	Expires	Billing Type	Pre-Approved/Local	
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- Insurance Tab can store multiple patient insurance policies
- Insurance Priority can be moved up or down by use of the arrow buttons in the right hand columns of the screen.
- Priority (primary, secondary) can be adjusted for the needs of the testing ordered.
- To edit a policy click on the policy line to highlight then click Edit Provider button located near the bottom of the screen
- To create a new policy, click the New Provider button

The New Insurance Provider Window

- When entering new insurance for a patient the insurance page pops out on the screen
- Required fields are in yellow
- The location of the Policy number has moved from the previous version of Labworks
- New to this version, the “Priority” field is used to set the primary or secondary status of the insurance being entered.
- Enter new information and click “Save” button to store information
- Guarantor information is accessed on the Details tab – see slide 22
- See User Manual for full details
- When done verifying or editing demographic and insurance information click save, the provider window will close, then click “New Order” in the bottom left corner of the Patient Demographics screen to continue the order process.

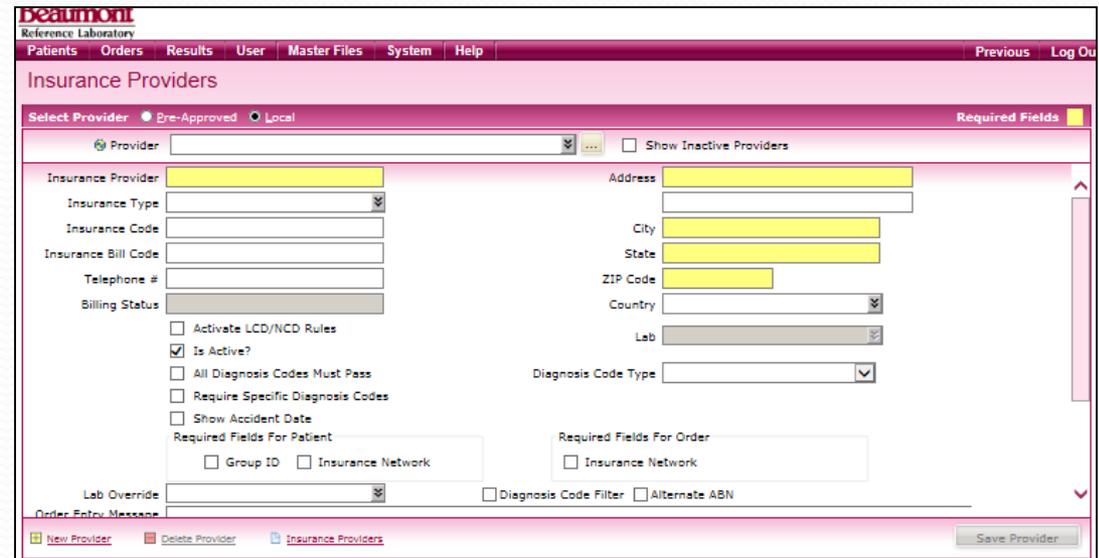
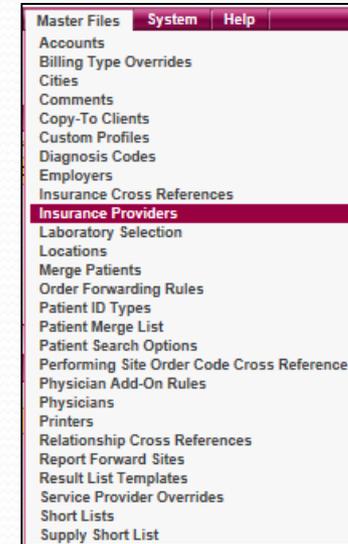
The screenshot displays the 'New Insurance Provider' window for patient SOFTTEST, BECKY. The window is titled 'Atlas LabWorks ...' and contains the following fields:

- Insurer:** A dropdown menu with a yellow highlight and a filter by: Medicare Medicaid.
- Network:** A dropdown menu.
- Responsible Party (L F MI):** A text input field.
- Issue Date:** A date picker.
- Expires:** A date picker.
- Policy #:** A text input field.
- Status:** A text input field.
- Lab:** A text input field.
- Group ID #:** A text input field.
- Priority:** A dropdown menu with 'Primary' selected.
- Subscriber (L F MI):** A text input field.
- Address:** A text input field.
- City, State ZIP Code:** A text input field.
- Employer:** A dropdown menu.
- Relationship:** A dropdown menu.
- Gender:** A dropdown menu.
- SSN:** A text input field.
- DOB:** A date picker.
- Phone:** A text input field.

The 'Required Fields' section is highlighted in yellow. At the bottom of the window, there are buttons for 'Save' and 'Cancel', and a 'Cancel' button. The background shows the 'Patient Demographics' screen with tabs for 'Details' and 'Insurance'.

“Local” Insurances

- If a patient’s insurance is not found in the list of insurance providers a new insurance provider can be created through the Local Insurance menu
- To begin the process click on the Master Files Tab and select Insurance Providers
- When the Insurance Providers screen opens, click the New Provider button in the bottom left corner
- Click the “Local” radio button in the Select Provider header of the screen
- Required fields are highlighted yellow
- When entering a “local” insurance provider the user must select an insurance type from the drop down list – choices include Medicare, Medicaid Commercial, Automobile, Workers Compensation. Additionally the payor’s (insurance company’s) address and zip code are now required fields:
- Once the required information is entered, click the Save Provider button in the lower right corner. The Insurance Provider screen will close and you will be returned to Patient Demographics



Order Info Tab

- Once Demographics and Insurance has been verified click the “New Order” button to start the order process

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New Order

Order Info Tests Diagnosis Codes Questions

Order Information Required to Save Required to Order

Order # 40000070BL09999

Ordering Physician [Dropdown]

Account BL09999

Billing Type Insurance

Ins Network [Dropdown]

Draw Options

In Office PSC

Collected Date 09/08/2014 Time 10:08

User bucata,rebecca

Ord Location RO-Atlas IB Testing Pract

Insurance Edit

Primary Insurer BCBS - BLUE CHOICE P.. Policy # 987654321

Ins Type Subscriber PCRTRAIN,APPLE MACI..

Resp Party Group ID # ABC123456789

Specimen Collector's Initials [Text]

Chart # B [Dropdown]

Clinical Info [Text]

Notes [Text]

Copy Results To [Text]

Cancel Continue

• Select Ordering Physician from Drop Down

• You can enter collectors initials if desired

• Copy To Link does not function, Put copy requests in Notes Box

• Click Continue to proceed

Tests Tab

- The Short List will contain the 25 most frequently ordered tests in your office
 - Directory of service button gives you the search capability
 - Custom Profile button lets you order any profiles you have built
- You can search by Test Name, Code, or Mnemonic
 - The Test Name is the actual name of the test
 - The Code is the EPIC Test Code (LAB####)
 - The Mnemonic is the Soft Test ID
- The Directory of Service Link can help you get to the Beaumont Laboratory Test Directory
- When all tests ordered, click Continue to proceed

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New Order

Patient: PCRTRAIN,APPLE ... DOB-Age: 03/22/1983 - 31 Y ID: ABL0999900012
Prim. Phys: BRLMRN: 6010269 Gender: Male
Ord. Phys: KOLINS,MARK D Order #: 40000070BL09999

Order Info Tests Diagnosis Codes Questions

Order Tests From: Directory of Services Custom Profiles

Tests filter by: Code Name Mnemonic

Short List Site Physician Patient Specialty

<input type="checkbox"/> Culture, Urine	<input type="checkbox"/> Complete Blood Count w ...	<input type="checkbox"/> Glucose	<input type="checkbox"/> Protein, Urine 24 hr
<input type="checkbox"/> Febrile Agglutinins	<input type="checkbox"/> Pap Test (Thin Prep)	<input type="checkbox"/> Thyroid Stimulating Horm...	<input type="checkbox"/> Basic Metabolic Panel
<input type="checkbox"/> Culture, Wound Deep	<input type="checkbox"/> Pretransplant Drug Screen	<input type="checkbox"/> Lipid Panel	<input type="checkbox"/> Cell Count, Fluid
<input type="checkbox"/> Protime and aPTT	<input type="checkbox"/> Prostate Specific Antigen (...)	<input type="checkbox"/> Electrolytes Panel (Lytes)	<input type="checkbox"/> Albumin
<input type="checkbox"/> Cell Count, CSF	<input type="checkbox"/> Creatinine, Urine 24 hr	<input type="checkbox"/> Protein Electrophoresis, U...	<input type="checkbox"/> Antigen, Legionella UR

Ordered Test Code Priority

Delete All Tests Directory of Services

Copy Results To

Cancel Continue

Diagnosis Codes Tab

- The Short List will contain the diagnosis codes most frequently used in your office
- Search by Mnemonic will allow a search by a “keyword”
- Search by code will allow you to pull up the Dx by the ICD9 code
- Search by name will allow looking up the code by the actual name
- Click Continue to advance to the Questions Tab
- You must select at least one diagnosis code per test

The screenshot shows the 'Diagnosis Codes' tab in the Beaumont Reference Laboratory software. The interface includes a navigation menu at the top with options like 'Patients', 'Orders', 'Results', 'User', 'Master Files', 'System', and 'Help'. A patient information box at the top right displays details for 'PCRTRAIN, APPLE ...', including DOB, age, ID, and gender. The main area is titled 'New Order' and contains a table for 'Apply Diagnosis Codes to Selected Tests'. The table lists three tests: 'Thyroid Stimulating Hormone (TSH)', 'Lipid Panel', and 'Glucose', each with associated diagnosis codes 'V70.0, 648.13'. Below the table is a 'Delete Diagnosis Codes' section with a search field and filter options (Code, Name, Mnemonic). A 'Short List' section at the bottom shows a list of diagnosis codes with checkboxes for selection, including '791.0 *PROTEINURIA', 'V70.0 *ROUTINE MEDICA...', '599.0 *URINARY TRACT I...', '648.13 *THYROID DYSFU...', 'V58.69 *ENCOUNTER LO...', 'V76.3 *SCREENING MAL ...', 'V76.2 *SCREENING MAL ...', and 'V76.44 *SCREENING MAL...'. At the bottom right, there are 'Cancel' and 'Continue' buttons.

Ordered Test	Diagnosis Codes
Thyroid Stimulating Hormone (TSH)	V70.0, 648.13
Lipid Panel	V70.0, 648.13
Glucose	V70.0, 648.13

Short List

<input type="checkbox"/> 791.0 *PROTEINURIA	<input checked="" type="checkbox"/> V70.0 *ROUTINE MEDICA...	<input type="checkbox"/> 599.0 *URINARY TRACT I...	<input checked="" type="checkbox"/> 648.13 *THYROID DYSFU...
<input type="checkbox"/> V58.69 *ENCOUNTER LO...	<input type="checkbox"/> V76.3 *SCREENING MAL ...	<input type="checkbox"/> V76.2 *SCREENING MAL ...	<input type="checkbox"/> V76.44 *SCREENING MAL...

Questions Tab

- The Questions Tab contains questions for information the lab needs to run the testing. Such as source and site for cultures, or LMP for PAP smears
- Required fields are in yellow

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Patients Orders Results User Master Files System Help Previous Log Out

New Order

Patient: PCRTRAIN,APPLE ... DOB-Age: 03/22/1983 - 31 Y ID: ABL0999900012
Prim. Phys: BRLMRN: 6010269 Gender: Male
Ord. Phys: KOLINS,MARK D Order #: 40000070BL09999

Order Info Tests Diagnosis Codes **Questions**

Test Questions Required To Save Required to Order

Culture, Wound Deep / LAB5510

CXWND Source CXWND Site

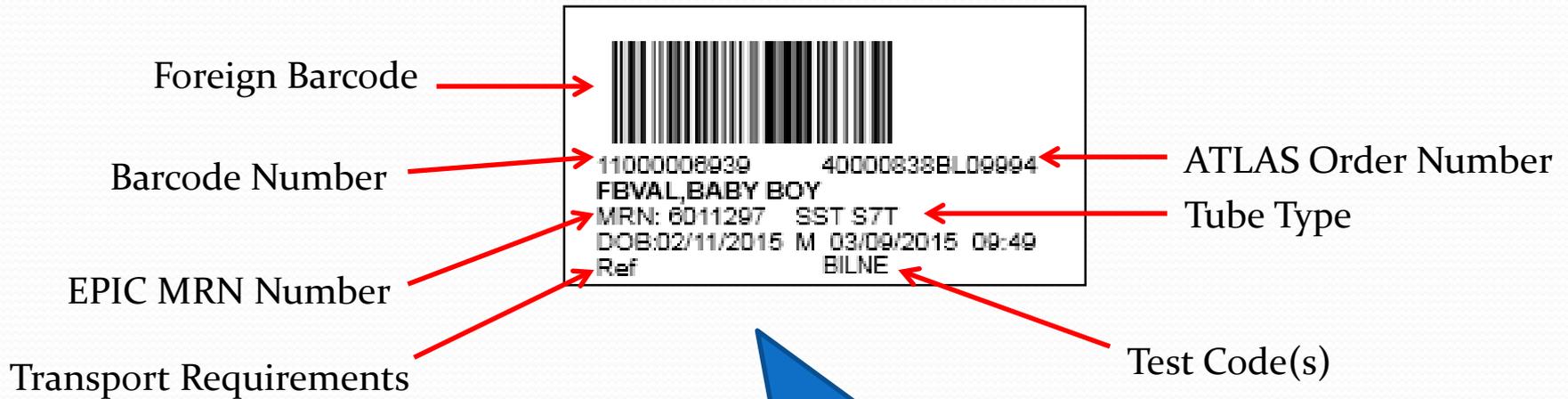
Comment

Copy Results To

Instrument Ready Barcode Labels

- In Spring 2015 Beaumont Health implemented a new step in integration of laboratory services with outreach clients and our new affiliate laboratories at Botsford and Oakwood.
- Atlas Labworks, is used as the middleware in this integration. The Atlas system generates instrument ready barcoded specimen labels that are recognized within the Soft LIS system without the need for relabeling.

Instrument Ready Barcode Label



This Foreign Barcode (FB) Label is the ONLY way that Laboratory Processors will know at the start of this process that this is different and does not require relabeling.

Barcode Limitations and ATLAS Order Entry Categories

- In order to fully optimize the use of the instrument ready barcode labels, it was necessary to institute new order entry categories within the ATLAS system. This means that the way tests split out onto separate requisitions and order numbers has changed.
- Previously, orders split primarily according to their priority (routine vs. STAT) and transport conditions (refrigerated vs. frozen) with additional splitting off of Microbiology and Anatomic Pathology orders.
- Now several new categories have been added, 24 hour urine orders, sendout orders, and other categories will cause orders to split – this can affect the number of tubes that are required to be collected for orders on one patient.

Ordering and Specimen Collection with Instrument Ready Barcode Labels

- Because of the way the order entry categories are utilized with the IRBC labels, the most efficient workflow is to place the orders in ATLAS and print out the specimen labels **before** collecting the samples from the patient. This will insure that all needed tubes and samples are collected.
- If for any reason, it is not possible to collect all the needed tubes or samples from the patient, it is still necessary to send the barcode labels for the not collected samples to the lab. Place the unused labels in the transport bag with the other samples. Do not attach more than one label to any sample. The laboratory will use the unused labels to determine if pour overs or aliquots are needed to complete the testing.

Reports

- Reports will usually be set up to generate automatically, per the office preferences
- The Report Tab Default display is all reports not yet reviewed by the client
- The Search Criteria Tab can help narrow selections when looking for a particular report or set of reports
- Links at the bottom of the Reports screen allow for printing and marking of reviewed reports

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Patients Orders Results User Master Files System Help Log Out

Reports

Patient: PCRTRAIN,NURSE ... DOB-Age: 08/14/1981 - 33 Y ID: Prim. Phys: KOLINS,MARK D BRLMRN: 6010349 Gender: Female

Reports Search Criteria

UT Unsolicited Tests

Patient	Order #	Accession #	Collected	Reported	New	Lab	Report Status
PCRTRAIN,NUR	40000042BLO	60103492001	08/28/14 15:17	09/04/14 12:46	X	MICRO	Part.
PCRTRAIN,MEE	40000049BLO	60103442001	08/29/14 07:19	09/04/14 12:46	X	MICRO	Part.
SOFTTESTTWO	528498283	60100282002	09/03/14 12:31	09/04/14 06:58	X	1 UT A	Final

Report Historical Mark Report As Read Order

Print All Reports Mark All Reports As R... Result List

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Patients Orders Results User Master Files System Help Log Out

Reports

Patient: PCRTRAIN,NURSE ... DOB-Age: 08/14/1981 - 33 Y ID: Prim. Phys: KOLINS,MARK D BRLMRN: 6010349 Gender: Female

Reports Search Criteria

Patient: [Dropdown]
 Ordering Location: [Dropdown]
 Reported Date Range: 09/01/2014 To 09/08/2014
 Report Status: All
 Source: [Dropdown]
 Ordering Account: [Dropdown]

Ordering Physician: [Dropdown]
 Contains Unsolicited Test: [Dropdown]
 Order #: [Text]
 Accession #: [Text]

Only Display:
 Unread by Me
 New (no one has read)
 Abnormal
 Finalized

Reports Containing:
 Test Not Performed
 Cancelled test
 Updated result

Sort Reports By: Patient Report Date
 Forwarded to ES: [Dropdown]

Search Clear

Save Search Criteria as Default

Patient Reports – Searching from the Patients Menu

You can quickly locate reports for a single patient through the Patients menu by doing the Patient Search function, selecting the patient, and then selecting the Patient Reports function on the patient menu.

The screenshot displays the 'Patient Reports' interface for patient SOFTTEST, BECKY. The patient information includes ID: ABL0995600..., Female, 03/22/1963, 53Y, Prim. Phys: SYKE,S,ELIZ..., and BRLMRN: 6013759. The interface shows a table of reports with columns for Collected, Resulted, Reported, Order #, Status, and Lab. Below the table, there are tabs for Report, Historical, and Order. The 'Reported Results' section is active, showing a table with columns for Result Name, Collected, Resulted, Result, Units, Ref. Range, Level, Test Code, and Lab. At the bottom, there are input fields for Test Name, Test Notes, and Result Notes, along with buttons for Results List, Graph Results, Historical Results, and Result Detail.

Collected	Resulted	Reported	Order #	Status	Lab
03/09/16 07:35	05/16/16 15:24	03/25/16 10:01	40004614BL09996	Final	1
03/09/16 07:52	03/09/16 08:06	03/09/16 08:19	40004615BL09996	Final	1
03/04/16 09:00	03/04/16 11:23	03/04/16 09:58	528597027	Final	MICRO
02/19/16 15:30	02/23/16 15:28	02/19/16 15:34	528594894	Final	MICRO

So what else should I know about Beaumont Labworks?

- You may need to update patient information
- There is a built in link to the Beaumont Laboratory Test Directory
- New Look to the requisition forms – no more handwritten forms!
- You can generate cumulative reports
- You can create your own custom profiles
- Duplicate patient files may need to be merged



The “Update Patient Information” notice

- At times, the information contained in the PCR will not match the information in the patient’s client site file.
- When this occurs a notification window will display listing both the PCR file and the account file information.
- The user has the choice of accepting an update of the account information from the PCR, or ignoring the mismatched information.
- Users cannot update PCR information; this must be done by the registration department of Beaumont Health.

The “Update Patient Information” notice

Atlas LabWorks
https://testing-beaumont.elaborders.com/lvwebapps/dialogs/lwUpdatePatDemographics.htm

Update Patient Information Has Different Values

The demographic information for this patient on your site does not match the information in the Patient Centric Repository (PCR). Would you like to update "Your Site Information" with the data from "Patient Centric Repository Information"?

Patient Centric Repository Information	Your Site Information
PCR - Demographics Information	Your Site - Demographics Information
Last Updated: 10/14/2013 10:59AM	Last Updated: 08/15/2013 03:03PM
Billing Type: Insurance	Billing Type: Insurance
Name (L F MI): TAYLOR AMY	Name (L F MI): TAYLOR AMY
AKA:	AKA:
SSN: Is Auto Assigned: No	SSN: Is Auto Assigned: No
Gender: Female DOB: 08/01/1955	Gender: Female DOB: 08/01/1955
Address: 4589 SUGAR MAPLE AVE	Address: 99887 WARD AVE
City: ROYAL OAK	City: ROYAL OAK
State: MI ZIP: 48067	State: MI ZIP: 48067
Phone: (248)997-1122	Phone: (248)997-1122
PCR - Guarantor Information	Your Site - Guarantor Information
Guarantor Name: TAYLOR,AMY	Guarantor Name: TAYLOR,AMY
Address: 4589 SUGAR MAPLE AVE	Address: 99887 WARD AVE
City, State ZIP: ROYAL OAK, MI 48067	City, State ZIP: ROYAL OAK, MI 48067

Ignore Update

https://testing-beaumont.elaborders.com/lvwebapps/dialogs/lwUpdatePatDemographics.htm Internet

When PCR and site information for the patient file do not match this window displays. The mismatched information is highlighted. The user should verify the correct information with the patient, and if PCR information is correct update the site information by clicking the Update button.

So what do I do if the PCR information is not correct?

- If the information in the site file is correct, but the PCR information is out of date, click the “ignore” button to keep the site information.
- Make a copy of the Patient’s Drivers License or State ID card, and their insurance card, and send it to the lab marked “New information, please update patient file”.



Link directly to the Beaumont Laboratory Test Directory

- New to this version of Atlas is a direct link to the Beaumont Laboratory Test Directory (LTD)
- Access the LTD by clicking the Directory of Services button in the QuickLinks column on the right side of the screen.



Link directly to the Beaumont Laboratory Test Directory

- The Link to the LTD is in the upper right corner of the Directory of Services screen

Lookup Test By [Beaumont LTD](#)

Code Name Mnemonic [Clear](#)

Test Mnemonic: AGSSA

Selected Profile: []

Component: []

Test Name: Strep Screen, Group A

Test Code: LAB5472

Test Info | Test Specimens | Test Results | Test Questions | Test Schedule | Tech Info | Other Info

Ordering Lab: Beaumont - Microbiology

Performing Lab: Beaumont - Microbiology

Accession Group: OTHER

Billing Name: []

Active Date: []

Inactive Date: []

ABN Price: \$0.00

Active Scheduled

Billable Auto Finalize

Pathology Not Orderable

Infectious Reference Lab

When Ordering, this Test Requires:

A Separate Order

A Separate Accession Number

Resulted by Non-HL7 Image

LCD/NCD Failure Type: []

Test Can Be Ordered: [] Times

Within: [] []

Applicable Gender: All

Priority Level: Routine

Default Draw Option: []

[Test](#) [Test Pricing Report](#) [External Directory of ...](#)

[UI Options](#)

LTD Link!

The Requisition Form

- Requisition forms for clients using Electronic Ordering have Large Bold face “E-Order” in the upper right corner.
- This notifies the laboratory to look in the lab computer for the electronically transmitted order.

Client and Order		Physician			
Account #:	BL09996	Physician:	BOYANTON JR,BOBBY L	40000543BL00996	
Name:	Royal Oak - Test EMR OB/GYN Practice	NPI #:	1558564922		
Address:	123 Maple Ave West Bloomfields Twp MI 48073	Provider #:	3262	Beaumont[®] Laboratory	
Type:	Insurance			Beaumont Laboratory	
Collected:	03/05/2014 13:29			3601 W. Thirteen Mile Road	
Order:	03/05/2014 13:29			Royal Oak, Mi 48073	
Requisition	40000543BL00996			Atlas Requisition	
Drawn At:				E-Order	
Patient		Primary Insurance			
Patient ID	6002987	Insurance:	1018-BCBS - BLUE CHOICE POS		
Name:	ATLASMERGE,MICHELLE	Address:	PO BOX 166		
Sex/DOB/Age:	Female 09/29/1978 35 Years		DETROIT, MI 48231		
Address:	123 MAIN STREET	Group:	12345		
	GARDEN CITY, MI 48135	Policy #:	ABC987654321		
Phone:	(734)555-1212	Subscriber:	ATLASMERGE,MICHELLE - Self		
Guarantor		Secondary Insurance		Miscellaneous	
Name:	ATLASMERGE,MICHELLE	Insurance:		Floor # / Room #:	
Relationship:	Self	Address:		User Initials:	Caldwell,Michelle
Address:	123 MAIN STREET	Group:		Specimen Collected By:	
				Ext ID:	40000543BL09996

The “Sent to Lab” status

- Orders placed in the system will have an initial status of “*Not Sent to Lab*”.
- At scheduled intervals the system will automatically send the electronic order to the laboratory, and the order status will then display as “*Sent to Lab*”.
- If for some reason, the “*Sent to Lab*” step does not proceed, the order will be directed to an error queue in Labworks and an assigned Customer Service Representative or Laboratory Processor will resolve the issue and complete the order process at Beaumont Laboratory.
- Should you notice that an order remains at the “*Not Sent to Lab*” please package the specimen and requisition as you normally would and send the order on to the laboratory.
- If you should notice that none of your orders are advancing to the “*Sent to Lab*” status, please contact the laboratory, as a system error may have occurred within your application and assistance from the Laboratory IT department may be required to restore full functionality.

The “Sent to Lab” status

Order Search

Patient: ATLASOFT,EAGLE DOB-Age: 07/05/1972 - 41 Y ID: ABL0999600020
Prim. Phys: RAJAKRISHNAMU... SSN: Gender: Male

Collect...	Order	Order Status	Name	ID	Acct	Phys	Type	P/S	Stat Orders	SO
09/24/134000000255BL095	Not Sent To Lab	ATLASOFT,EAGLE	ABL0999600	BL095	RAJAKRISHNAM	Medicare				
09/24/134000000254BL095	Not Sent To Lab	ATLASOFT,ALLIGATO	ABL0999600	BL095	SWANTON JR,E	Insuranc				

Requisition Send Order Order Edit Order Delete Order Perform Order

Patient QuickLinks

- Reports
- Cumulative Reports
- Order History
- Demographics
- New Order
- New Standing Order

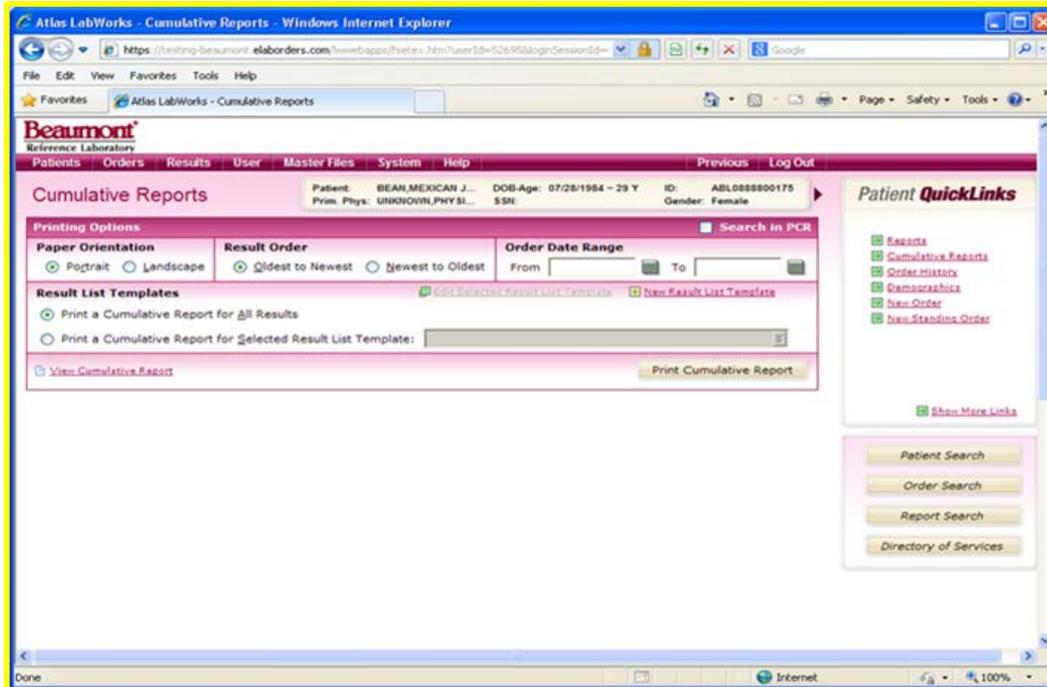
Show More Links

Patient Search
Order Search
Report Search
Directory of Services

Orders initially have an Order Status of *Not Sent to Lab*. At scheduled intervals the Labworks system sends the orders to Beaumont Laboratory via the electronic interface. At such time the Order Status will display as *Sent to Lab*.

Cumulative Reports

- While Labworks has always had “cumulative reports” they previously had very little value because individual orders on the same patient were not really linked to each other.
- Now because of the integrated patient file, cumulative reports have new value.



Cumulative Reports Screen, fill out the fields and select the options to define the type of cumulative report you wish to print, then click the “Print Cumulative Report” button

Setting Up Custom Profiles

- Clients have the ability to build their own custom profiles of tests in the Labworks system. Follow these steps to create a custom profile.

1. Click on Master Files
2. Select Custom Profiles



Custom Profile Set Up

Beaumont
Reference Laboratory

Patients Orders Results Master Files System Help

Profiles

Custom Profile Name Search Clear

Profile Name	Profile Description
GP OB PANEL	Obstetric Panel

Profile Name Profile Description

+ New Profile Delete Profile Save Profile

Profile Components

Test Code	Test Name	Performing Lab
-----------	-----------	----------------

Component filter by: Code Name Mnemonic

+ New Component Delete Component Directory of Services Save Component

3. Click on New Profile
4. Enter a name for the new profile
5. Save the profile

Custom Profile Set Up

Beaumont
Reference Laboratory

Patients Orders Results Master Files System Help Previous Log Out

Custom Profiles

Required Fields

Custom Profile Name Search Clear

Profile Name	Profile Description
CBCWD, Lytes, glucose	Obstetric Panel

Profile Name: Dr. Becky's Profile Profile Description: CBCWD Lytes glucose

Profile Components

Test Code	Test Name	Performing Lab
-----------	-----------	----------------

Component: CBCWD filter by: Code Name Mnemonic

New Component option

Component Name, Code, or Mnemonic here

6. Click on New Component
7. Lookup and enter each component
8. Save after each component selection
9. Repeat steps 6-8 for each component

Save after each component selection

Merging Patient files – a tricky concept

- On occasion a patient's information will be placed into the Beaumont Health patient database more than one time. This can occur due to name changes, use of nicknames, or registrar error.
- Beaumont Health strives to maintain the integrity of the patient's medical record by maintaining only a single copy of the patient file within its information systems.
- Computerized systems and specially trained personnel are utilized to recognize when patient files have been duplicated and after careful verification that the duplicate files are indeed records of only one unique patient, the patient records are merged in the Hospital information system.
- However, the duplicate files will continue to exist in the Labworks PCR system until the records are merged there as well.

Merging Patient files – a tricky concept

How and When to perform a Patient Record Merge

- Often times the merge process is initiated within EPIC One Chart, The Beaumont Health Information System. When a merge occurs in the EPIC system, an electronic message is sent to the Labworks system that removes the MRN from the patient record in the Client's Labworks database for their office.
- The user should be verifying that an MRN is listed in the patient record for every order placed in the Labworks system. If the user encounters a patient file without an MRN, the user should re-acquire the patient record from the PCR and merge the PCR and client database patient records.

Merging Patient files – a tricky concept



Patients Orders Results User Master Files System Help Previous Log Out

Patient Search

Patient: _____ DOB-Age: _____ ID: _____
Prim. Phys: _____ SSN: _____ Gender: _____

Lookup By

Patient Search Clear Recently Selected Patients Search PMS Advanced

BRL MRN#	Name	SITE PID	DOB	Gender	City	Primary Physician
6002222	ADAMS,AMY	ABL0999500053	08/20/1976	Female	STERLING HEIGHTS	NICHOLS,MICHAEL W
6002761	ATLASMERGE, CHRIS	ABL0999500067	09/23/1967	Female	BERKLEY	
6001545	ATLASSOFT,A	ABL0999500010	07/01/1970	Male	GARDEN CITY	BRIKHO,BASEL A
6002023	ATLASSOFT,ALLIGATOR	ABL0999500011	07/01/1972	Male	GARDEN CITY	NICHOLS,MICHAEL W
6001546	ATLASSOFT,B	ABL0999500017	07/02/1970	Female	TROY	NICHOLS,MICHAEL W
6002024	ATLASSOFT,BUTTERFLY	ABL0999500012	07/02/1972	Female	TROY	BRIKHO,BASEL A
6001547	ATLASSOFT,C	ABL0999500013	07/02/1972	Female	TROY	BRIKHO,BASEL A
6002025	ATLASSOFT,CATERPILLAR	ABL0999500014	07/02/1972	Female	TROY	BRIKHO,BASEL A
6001548	ATLASSOFT,D	ABL0999500015	07/02/1972	Female	TROY	BRIKHO,BASEL A
6002026	ATLASSOFT,DEER / ATLASSOFT	ABL0999500016	07/06/1972	Female	ROYAL OAK	NICHOLS,MICHAEL W
6001549	ATLASSOFT,E	ABL0999500017	07/02/1970	Female	TROY	NICHOLS,MICHAEL W
6002027	ATLASSOFT,EAGLE	ABL0999500018	07/02/1972	Female	TROY	BRIKHO,BASEL A
6001550	ATLASSOFT,F	ABL0999500019	07/02/1972	Female	TROY	BRIKHO,BASEL A
6002028	ATLASSOFT,FOX	ABL0999500016	07/06/1972	Female	ROYAL OAK	NICHOLS,MICHAEL W
6001553	ATLASSOFT,G	ABL0999500024	07/07/1970	Male	TROY	NICHOLS,MICHAEL W

New Patient Demographics Delete Patient Show Deleted Patients
 Insurance Check In

Search In PCR

Original Patient Record for ATLASMERGE, CHRIS in the Client Database had a MRN #

Patient Search

Patient: ADAMS,AMY DOB-Age: 08/20/1976 - 37 Y ID: ABL0999500053
Prim. Phys: NICHOLS,MICHAEL... SSN: Gender: Female

Lookup By

Patient Search Clear Recently Selected Patients Search PMS Advanced

BRL MRN#	Name	SITE PID	DOB	Gender	City	Primary Physician
6002222	ADAMS,AMY	ABL0999500053	08/20/1976	Female	STERLING HEIGHTS	NICHOLS,MICHAEL W
	ATLASMERGE,CHRIS	ABL0999500067	09/23/1967	Female	BERKLEY	NARLA,DURGADAS
6001545	ATLASMERGE,CHRIS	ABL0999500067	09/23/1967	Female	BERKLEY	NARLA,DURGADAS
6002023						
6001546						
6002024						
6001547						
6002025						
6001548						
6002026						
6001549						
6002027						
6001550						
6002028	ATLASSOFT,G	ABL0999500024	07/07/1970	Female	ROYAL OAK	NICHOLS,MICHAEL W
6001553	ATLASSOFT,G	ABL0999500024	07/07/1970	Male	TROY	NICHOLS,MICHAEL W

Duplicate Patient Records were discovered in the Hospital Information System (HIS), and the records were merged, The HIS sent a message to the Labworks system which updated the associated records in the Client Database by removing the MRN #.

The Missing MRN # is an indication that the user needs to reacquire the patient record from the PCR and merge the client record into the PCR record.

To begin the Record Merge process, reacquire the Hospital Medical Record by clicking on the Search In PCR Link

Patient Centric Repository Patients						
Name	MRN	DOB	Gender	PCR ID	City	Phone Number
ATLASMERGE,CHRIS	6002762	09/23/1967	Female	ALES01701	BERKLEY	(248)555-5555

Using the appropriate patient identifiers, locate and acquire the correct patient record from the PCR

Once you have acquired the correct patient record from the PCR, you will have 2 patient records in your site database for the same patient, one with the MRN and one missing an MRN. You now need to merge the record that is missing the MRN *into* the record that has the correct MRN #.

Patient Search						
Patient: ATLASMERGE,CH...		DOB-Age: 09/23/1967 - 46 Y		ID: ABL0999600073		
Prim. Phys:		SSN:		Gender: Female		
Lookup By						
Patient: ATLASMERGE, CHRIS		Search		Clear		<input type="checkbox"/> Recently Selected Patients
		Search PMS		Advanced		
BRL MRN#	Name	SITE PID	DOB	Gender	City	Primary Physician
	ATLASMERGE,CHRIS	ABL0999600073	09/23/1967	Female	BERKLEY	
6002762	ATLASMERGE,CHRIS	ABL0999600082				

Make a note of the last 6 digits of the PID, and which one has a BRL MRN #

- The next step in the process is to enter the Merge Patients function.
- Go to the Master Files dropdown menu and click on Merge Patients.

The screenshot displays a software interface for patient management. At the top, there are navigation tabs: Patients, Orders, Results, Master Files, System, Help, Previous, and Log Out. The 'Master Files' dropdown menu is open, showing options: Copy-To Clients, Custom Profiles, Insurance Providers, Merge Patients (highlighted), Merge List, Short Lists, and Supply Short List. Below the menu is a 'Patient Search' section with a 'Look up By' dropdown set to 'Patient' and an empty search input field. To the right, there are search criteria fields for 'DOB-Age:', 'SSN:', 'ID:', and 'Gender:'. Below these are 'Clear' and 'Advanced' buttons, and a checkbox for 'Recently Selected Patients'. The main area contains a table of patient records with columns: BRL MRN#, Name, ABL ID, DOB, Gender, City, and Primary Physician.

BRL MRN#	Name	ABL ID	DOB	Gender	City	Primary Physician
6002719	ATLASMERGE,BRETT	ABL0999600066	08/02/1981	Male	TROY	BOYANTON JR,BOBBY L
	ATLASMERGE,CHERYL	ABL0999600078	02/02/1972	Female		
	ATLASMERGE,CHRIS	ABL0999600073	09/23/1967	Female	BERKLEY	
6002762	ATLASMERGE,CHRIS	ABL0999600082	09/23/1967	Female	BERKLEY	
6002720	ATLASMERGE,CLINT	ABL0999600067	08/03/1983	Male	TROY	BOYANTON JR,BOBBY L
6002720	ATLASMERGE,DIANE	ABL0999600060	08/04/1984	Female	ROYAL OAK	BOYANTON JR,BOBBY L

Search for your duplicate patients by last and first name. When you have located the patients to be merged, click on each one (one at a time) and click on the “Mark For Patient Merge” link.

Patients Orders Results Master Files System Help Previous Log Out

Merge Patients

Patient: ATLASMERGE,CH... DOB-Age: 09/23/1967 - BER... ID: ABL0999600073
Prim. Phys: SSN: Gender: Female

Select a Patient

Patient Search Clear Patient Merge List

Name	ID	SSN	DOB	Gender	MRN
ATLASMERGE,CHRIS	ABL0999600073		09/23/1967	Female	
ATLASMERGE,CHRIS	ABL0999600082		09/23/1967	Female	

Click on the patient record and then on the Mark for Patient Merge link. Do this for both records to be merged

 [Mark for Patient Merge](#)

Once both patient records have been marked for merging, click on the patient merge list button.

Patients Orders Results Master Files System Help Previous Log Out

Merge Patients

Patient: ATLASMERGE,CH... DOB-Age: 09/23/1967 - BER... ID: ABL0999600073
Prim. Phys: SSN: Gender: Female

Select a Patient

Patient Search Clear Patient Merge List

Name	ID	SSN	DOB	Gender	MRN
ATLASMERGE,CHRIS	ABL0999600073		09/23/1967	Female	
ATLASMERGE,CHRIS	ABL0999600082		09/23/1967	Female	

Once both patient records have been marked for patient merge, click on the Patient Merge List button.

[Mark for Patient Merge](#)

Merge Patients

Patient: ATLASMERGE,CH... DOB-Age: 03/22/1963 - ID: ABL0999900058
Prim. Phys: BRLMRN: 6010478 Gender: Female

Select a Patient

Patient

Search

Clear

Patient Merge List

Name	ID	SSN	DOB	Gender	MRN
ATLASEMR,IBE	ABL0999900010		06/06/1978	Female	
ATLASEMR,ROSE	ABL0999900005		01/01/1990	Female	
ATLASMERGE,CHRIS	ABL0999900005				
ATLASMERGE,CHRIS	ABL0999900005				
ATLASSITEBUILD,A	ABL0999900005				
CLIENTTRAIN,ALFALFA	ABL0999900005				
CLIENTTRAIN,APLE	ABL0999900005				
CLIENTTRAIN,APPLE	ABL0999900005				
CLIENTTRAIN,CLARENCE	ABL0999900005				
CLIENTTRAIN,LUCEY	ABL0999900005				
CLIENTTRAIN,MICKEY MO	ABL0999900005				
CLIENTTRAIN,PATTY	ABL0999900005				
CLIENTTRAIN,SAMANTHA	ABL0999900005				
CLIENTTRAIN,TOM	ABL0999900005				
CLIENTTRAIN,TOMATO L	ABL0999900005				

You are in Patient Merge Mode. Select link or [click here to exit.](#)

Mark for Patient Merge

Atlas LabWorks

https://testing-beaumont.elaborders.com/freedom/adcAlertBox.htm

ATLASMERGE,CHRIS and ATLASMERGE,CHRIS have been marked for merge.

OK

This merge message will appear, click the "OK" button to continue

https://testing-beaumont Internet | Protected Mode: On

- The Patient Merge List will display.
- Verify you have selected the correct patients.
- Click on the listed patients to highlight the line.
- Click on the Merge Patients link.

Patients Orders Results Master Files System Help Previous Log Out

Patient Merge

View Patients Who Were

Patient Search Clear Identified to be Merged Merged Unmerged

Name	Patient ID	DOB	Name	Patient ID	DOB	Note	User
ATLASMERGE,CHRIS	ABL099960	09/23/	ATLASMERGE,CHRIS	ABL099960	09/23/		Portal,Atlas

Merge Patients Unmerge Patients Unmark Patients Notes

A list of the records to be merged will display, verify you have selected the correct patients to be merged, click on the listing to highlight, then click on the Merge Patients Link

The Merge Detail screen will display. By using the PID # you previously made note of, determine which record needs to be merged into which, and click the corresponding button, Merge 1 to 2; or, Merge 2 to 1. The patient missing the MRN # is always **MERGED TO** the patient with the MRN #.

Patient 1: ATLASMERGE,CHRIS

ID: ABL0999600073
Phone #: (248)555-5555
Gender: Female
Address: 5454 SOMEWHERE STREET
City: BERKLEY
State: MI

Patient 2: ATLASMERGE,CHRIS

ID: ABL0999600082
Phone #: (248)555-5555
Gender: Female
Address: 123 ANYWHERE STREET
City: BERKLEY
State: MI

Date	Number	Status
11/13/2013	40000280BL09996	Se
11/14/2013	40000300BL09996	Se

Result Text

<< Cancel Merge 1 to 2 Merge 2 to 1 Unmerge

By using the previously noted PID, determine which record needs to be merged to which. In this example ID # 600082 was the record that HAD an MRN, so it is the record that is going to be the **"MERGE TO" RECORD**

So in this example patient 1 (missing the MRN) will be merged to Patient 2 (with a MRN #), leaving Patient #2 as the remaining, complete record.

Once the appropriate “merge to” button has been clicked, a pop-up will display asking if you are sure you want to merge the records. Click the Yes button to continue.

The screenshot displays a software interface with a top navigation bar containing 'Patients', 'Orders', 'Results', 'Master Files', 'System', and 'Help'. On the right side of the bar are 'Previous' and 'Log Out' buttons. The main area is titled 'Merge Detail' and is split into two columns for 'Patient 1: ATLASMERGE,CHRIS' and 'Patient 2: ATLASMERGE,CHRIS'. Each column contains a form with fields for ID, Phone #, Gender, Address, City, State, and Zip. Patient 1's ID is ABL0999600073 and address is 5454 SOMEWHERE STREET. Patient 2's ID is ABL0999600082 and address is 123 ANYWHERE STREET. Below the forms is a table titled 'Results to be Merged' with columns for 'Date' and 'Result'. A blue callout box with white text points to the 'Yes' button in a confirmation dialog, stating: 'If you are sure the merge selection is correct, click YES to continue'. The dialog box, titled 'Atlas LabWorks - Confirm Merge', asks 'Are you sure you want to Merge Patient 1 to Patient 2?' and has 'Yes' and 'No' buttons. At the bottom of the main window are buttons for '<< Cancel', 'Merge 1 to 2', 'Merge 2 to 1', and 'Unmerge'.

The records will be merged, leaving one completely detailed record in the Patient Database. You have successfully merged the 2 patient records!

Patients Orders Results Master Files System Help Previous Log Out

Patient Search

Patient: _____ DOB-Age: _____ ID: _____
 Prim. Phys: _____ SSN: _____ Gender: _____

Lookup By

Patient Search Clear Recently Selected Patients Advanced

BRL MRN#	Name	SITE PID	DOB	Gender	City	Primary Physician
6002719	ATLASMERGE,BRETT ATLASMERGE,CHERYL	ABL0999600066 ABL0999600078	08/02/1981 02/02/1972	Male Female	TROY	BOYANTON JR,BOBBY L
6002762	ATLASMERGE,CHRIS	ABL0999600082	09/23/1967	Female	BERKLEY	
6002720	ATLASMERGE,CLINT	ABL0999600067	08/03/1983	Male	TROY	BOYANTON JR,BOBBY L
6002723	ATLASMERGE,DIANE	ABL0999600068	08/04/1984	Female	ROYAL OAK	BOYANTON JR,BOBBY L
6002725	ATLASMERGE,ELIZABETH	ABL0999600069	08/05/1985	Female	TROY	BOYANTON JR,BOBBY L
6002739	ATLASMERGE,FRANK	ABL0999600070	08/06/1986	Male	ROYAL OAK	BOYANTON JR,BOBBY L
6202771	ATLASMERGE,TIFFANI	ABL0999600080	10/10/1970	Female		
6001545	ATLASSOFT,A	ABL0999600004	07/01/1970	Male	GARDEN CITY	BOYANTON JR,BOBBY L
6002023	ATLASSOFT,ALLIGATOR	ABL0999600024	07/01/1972	Male	GARDEN CITY	BOYANTON JR,BOBBY L
6001546	ATLASSOFT,B	ABL0999600005	07/02/1970	Female	TROY	NURKO,SAUL
6002024	ATLASSOFT,BUTTERFLY	ABL0999600025	07/02/1972	Female	TROY	GUZMAN-MORALES,CERE
6001547	ATLASSOFT,C	ABL0999600006	07/03/1970	Male	STERLING HEIGHTS	NURKO,SAUL
6002025	ATLASSOFT,CATERPILLAR	ABL0999600026	07/03/1972	Male	ROYAL OAK	NURKO,SAUL
6001548	ATLASSOFT,D	ABL0999600007	07/04/1970	Female	ROYAL OAK	O'SHEA,MARY D

Final Points to Ponder

- Always make sure your patient identifiers match
 - Last Name
 - First Name
 - DOB
 - Gender*
 - Phone Number*
- Make sure your patient has the BRL MRN#
- Look up tests in LTD if you need more information
- Call Client Services if you need assistance! 1-800-551-0488

A decorative border surrounds the text, consisting of alternating pink and light blue swirls and small light blue dots.

The End!