

ATLAS LabWorks.

User Guide for **Palmetto Health Richland Laboratory**

<https://atlas.palmettohealth.org>

Questions? Call 803-434-7770

<u>INITIAL LOGIN SCREEN</u>	1
<u>PATIENT SEARCH</u>	1
<u>LAB ORDERS</u>	2
<u>ORDER SEARCH BY PATIENT</u>	3
<u>RESULT SEARCH BY PATIENT</u>	4
<u>ORDER SEARCH BY SITE</u>	5
<u>MANIFEST</u>	6
<u>RESULT SEARCH BY SITE</u>	6
<u>LAB TEST CATALOG</u>	7
<u>USER OPTIONS</u>	7
<u>CUMULATIVE REPORT TEMPLATE</u>	8
<u>NEW INSURANCE PROVIDER</u>	8
<u>LABCORP ORDERS</u>	9
<u>QUICK HINTS</u>	10

INITIAL LOGIN SCREEN

If new results have been reported since a user's last login, the Lab Reports screen will appear. New results not seen by the user will appear bold and new results not seen by anyone will be bold and marked with an "X." (to navigate, see Result Search by Site)



PATIENT SEARCH

Select "Go to Patient Search," found at the top of the menu to the right of the screen.

- 1. Look up Patient** (Search by Name, SSN, or ID#)
 - a. Patient name found – highlight patient and select “Demographics”
 - b. Patient name not found – select “New Patient”

- 2. Add/Edit Demographics – “Details” Tab**

- a. Billing Type - select one of the following:
 - i. Account – office will get billed
 - ii. Insurance – a commercial insurance is the primary insurer
 - iii. Medicaid – Patient has Medicaid
 - iv. Medicare – Patient has Medicare
 - v. Patient – Patient will be billed for service (Self Pay)

NOTE: The billing type will decide what information will be required for patient registration

- b. Enter Patient Name
- c. Patient ID – if the office has a unique number for identifying their patients, you may use this number, their SSN or auto assign a number.
- d. SSN – Enter SSN (if applicable)
- e. Enter DOB
- f. Select Physician Name in Drop down menu
- g. Select Gender
- h. Complete the Patient Address (for city, state and zip; enter the zip code and select from the city list)
- i. Enter Patient Phone Number
- j. Select “Save Patient”

- 3. Add/Edit Insurances – “Insurance” Tab**

- a. Select “Insurance” from the menu to the right of the screen or select the “Insurance” tab under the Patient Demographics.
- b. Enter required information (Primary Insurer, Policy #, Group # and relationship)
- c. Select “Save Patient”

Additional Options (If applicable)

- a. If there is a Secondary Insurer – Select the “Show Secondary Insurer” option and enter Secondary Insurer Name, Policy #, Group #, and relationship

- b. If the patient is Medicare
 - i. You may select “Print MSP Questionnaire” in order to print the MSP forms
 - ii. Once the patient has signed, check the “patient signed MSP” box
- c. If the patient’s insurance cannot be found in the Pre-Approved or Local Insurance Provider Lists, it can be added to the Local Insurance Provider list (see *New Insurance Provider*)



LAB ORDERS

Once the patient has been selected, choose the “New Lab Order” option from the menu to the right of the screen.

1. New Lab Order

- a. Order Info Tab
 - i. Select Ordering Physician name from drop down menu
 - ii. Select Account # (Location ID)
 - iii. Select the billing type for the present tests being ordered
 - iv. Enter Collect Date (can enter “T” for today) & Time (“N” for now)
 - v. Enter additional information for the lab in the “Order Notes” (i.e., stat, fasting, page MD with results, etc)
 - vi. Continue to next screen
- b. Tests Tab
 - i. Common tests can be selected from the short list (most frequently ordered)
 - ii. Search for test by name or possible mnemonic (i.e., CMP or Comprehensive Metabolic Panel)
 - iii. At any time you may delete a test once its ordered by selecting the “Delete” button
 - iv. Select “Test Catalog” (near bottom of screen) to search catalog information while ordering
 - v. Continue to next screen

*NOTES: *If ordering 2 of the same test (Example: 2 wound cultures), you will have to place two separate orders for that patient.*

If ordering a culture with other tests, the culture will be separated from the other tests and Atlas will prompt the user on the steps needed to complete the order.

If an Atlas custom profile is ordered, it is the user’s responsibility to check all individual tests within the selected custom profile to ensure the order has been placed correctly.

- c. ICD-9s (Requirement varies based on billing type)

NOTE: ICD-9 codes will only be associated with the tests that are highlighted yellow

- i. Common ICD-9 codes can be selected from the short list (most frequently used)
- ii. Search by entering the beginning of code or complete diagnosis code
- iii. Continue to next screen

- d. Questions (varies based on specific test)
 - i. Enter needed information for certain tests:
 - 1. 24 hour urine collection start and end time
 - 2. weight and height for various tests
 - 3. Test names for Miscellaneous test code
 - 4. etc.
 - e. Requisition will print when order is complete
 - f. Attach any router label and/or original order to the Atlas requisition and place with the specimens to send to the lab.

2. Edit Orders

Orders can be edited or deleted. (See Order Search by Patient or Order Search by Site)

3. Transmit Orders to the Lab

It is preferable to send orders electronically in bulk to the lab, thereby having only one manifest for all orders sent at the scheduled time

- a. When the last order is placed before the courier pickup, click the “send orders to lab” seen at the top middle of screen.
- b. Once the orders are sent to the lab, the manifest will print.

Note: Once the “send orders to lab” has been completed:

- 1. *ALL orders placed will be sent to the lab.*
- 2. *No information can be edited/deleted on the sent orders.*



ORDER SEARCH BY PATIENT

Search for the patient by selecting “Go to Patient Search.” Enter Name, ID# or SSN to search and then select the patient. After the selection is made, the following options in the menu to the right of the screen are available.

1. Order History

Select a specific lab order to view that order’s information.

- a. Order History available options:
 - i. View status of the order, ordering physician, and collection time
 - ii. View tests ordered (test appear at bottom of screen)
 - iii. Verify specimen types for ordered tests
 - iv. Reprint Requisition (select “Requisition”)
 - v. Edit an Order (select “Edit Order”)

Note: only available if order has not been sent to lab

- 1. This option will return the user to the order entry screens – everything can be edited (collect time, add test, delete test, etc) except for billing type (i.e., change account to insurance) and account number (Location ID)
- 2. Once information is edited, follow the steps taken in a new order
- vi. Delete an Order (select “Delete Order” - this will delete the entire order)

Note: only available if order has not been sent to lab

2. Pending Orders

Select a specific lab order to view that order's information.

- a. Pending orders options:
 - i. View status of the order, ordering physician, and collection time
 - ii. View tests ordered (test appear at bottom of screen)
 - iii. Reprint requisition (select "Requisition")
 - iv. Reprint ABN (select "ABN") {option available only if Medicare patient}



RESULT SEARCH BY PATIENT

Search for the patient by selecting "Go to Patient Search." Enter Name, ID# or SSN to search and then select the patient. After the selection is made, the following options in the menu to the right of the screen are available.

1. Patient Lab Reports

Select a specific lab order of the patient to view ordered tests and results information.

- a. **"Reports for Patient" Section:**
 - i. Select "Report" to print or view the selected order's results
 - ii. Select "Historical" to print or view the selected order's test results and related test results from past orders
 - iii. Select "Order" to print or view the patient's order information (demographics, insurance, ICD-9s, etc)
- b. **"Reported Results" Section:**
 - i. Select "Results List" to print or view order's test results in grid format
 - ii. Select "Chart Results" to create a chart of 1-2 test results for the patient over time
 3. In the pop up box, select from the drop down menu 1-2 test results
 4. Select okay, chart will appear in new window
 5. Print chart by selecting "Print report" at bottom left of window
 - iii. Select "Result Details" to view each individual test result's information
- c. **"Tests for Selected Order" Section:**
 - i. Select "Open test catalog" to view details of the selected test in the Lab Catalog
 - ii. Select "View Test Details" to view the selected test's general information from the patient order

2. Results History

Search all test results for a patient or narrow search with specific criteria

- a. Select the specific test:
 - i. Select "Report" to print or view the selected result as well as the other test results from that event
 - ii. Select "Chart Results" to create a chart of 1-2 test results for the patient over time
 1. In the pop up box, select from the drop down menu 1-2 test results

2. Select okay, chart will appear in new window
3. Print chart by selecting “Print report” at bottom left of window
- iii. Select “Historical” to print or view the selected order’s test results and related test results from past orders
- iv. Select “Results List” to print or view results within the given search criteria in grid format
- v. Select “Cumulative Report” to select printing options for a cumulative report (see “*Cumulative Reports*”)
- vi. Select “Result Details” to view each individual test result’s information

3. Cumulative Reports

Print a cumulative report of results based on specific search criteria.

- a. Printing Options:
 - i. Page Orientation – portrait or landscape
 - ii. Result Order – oldest to newest or newest to oldest
 - iii. Order Date Range
 - iv. Cumulative Report for all results within given date range
 - v. Cumulative Report for selected result list template
 1. Choose a custom template from the drop down menu or select “New Result List Template” (see “*Cumulative Report Template*”)
 2. Select “View Cumulative Report” on bottom left or “Print” on bottom right



ORDER SEARCH BY SITE

Select “Go to Lab Order Search” from the menu to the right of the screen.

1. Lab Order Search

- a. Select the “Search Criteria” tab to narrow the report search
 - i. Select the desired criteria (search by Physician, patient, status, date, etc)
 - ii. Select “Search”
- b. Select the specific order:
 - i. View status of the order, ordering physician, and collection time
 - ii. View ordered tests’ information (tests appear at bottom of screen)
 - iii. Reprint Requisition (select “Requisition”)
 - iv. Edit an Order (select “Edit Order”)

Note: only available if order has not been sent to lab

1. This option will return the user to the order entry screens – everything can be edited (collect time, add test, delete test, etc) except for billing type (i.e., change account to insurance) and account # (Location ID)
2. Once information is edited, follow the steps taken in a new order
- v. Delete an Order (select “Delete Order” - this will delete the entire order)

Note: only available if order has not been sent to lab

MANIFEST

Select “Orders” from top left menu, and select “Manifest” from drop down menu.

1. Manifests Options

- a. Enter search criteria to narrow the search; specific manifest # or specific dates of service
- b. Print or view a manifest by highlighting the specific manifest and selecting “Manifest”
- c. Print the group of manifests in your search criteria all together by selecting “Print Coalesced Manifest “
- d. Print all Manifests in your search criteria by selecting “Print All Manifest”



RESULT SEARCH BY SITE

Select “Go to Lab Report Search,” which can be found in the menu on the right side of the screen. This option allows a search of all results for all patients.

1. Lab Reports

The default search criteria allow all results from the past week that have not been read by the user to appear in order of the most recently reported.

- a. Select the “Search Criteria” tab to narrow the report search
 - i. Select “Clear” to delete all default settings
 - ii. Select the desired criteria (search by Physician, report status, date, etc)
 - iii. Select “Search”

Note: Once the search criteria have been changed, these will become the active settings. The default settings will not reappear until the user’s next login.

- b. Select the specific order:
 - i. Select “Report” to print or view the selected order’s results
 - ii. Select “Historical” to print or view the selected order’s test results and related test results from past orders
 - iii. Select “Mark Report as Read” to mark the highlighted order with a status of “Read.” If the order has already been read, this option will read, “Mark Report as Unread.” If selected, the highlighted order will be marked with a status of “Unread”
 - iv. Select “Order” to print or view the patient’s order information (demographics, insurance, ICD-9s, etc)
 - v. Select “Print All Reports” to print all reports based on the specified search criteria
 - vi. Select “Result List” to view a list of all completed results for the selected order
 1. Select “Report” to print or view the report printout
 2. Select “Order” to print or view the patient’s order information

3. Select “Report History” to be sent to the “Patient’s Lab Reports” screen (see *Result Search by Patient*)
4. Select “Chart Results” to create a chart of 1-2 test results for the patient over time
 - a. In the pop up box, select from the drop down menu 1-2 test results
 - b. Select okay, chart will appear in new window
 - c. Print chart by selecting “Print report” at bottom left of window



LAB TEST CATALOG

Select “Go to Lab Test Catalog” from the menu to the right of the screen.

1. Lab Catalog

- a. In the keyword field, enter the test name
- b. Select from one of the seven information tabs found below the test name. (such as; specimen type, test questions {additional information needed by lab for test}, tech info {collection information}, and other info {such as, other names for test and CPT code})

Note: If needed test information is not found, you can select the Richland Outreach Manual found at the bottom right of the screen. This link will open the Adobe Reader version of the Lab’s Manual.



USER OPTIONS

Select “User” from the menu list at the top of the screen.

1. Change Password

- a. Select “Change Password”
- b. Enter old and then new password
- c. Select “Save New Password”

2. Navigate Between Multiple Sites

This option is only for users that have access to more than one Atlas site

- a. Select “Other Sites”
- b. Select the site name
- c. Select “Change”

CUMULATIVE REPORT TEMPLATE

Select “Master Files” and then “Result List Templates” from the menu list at the top of the screen. This option allows a user to customize cumulative reports by selecting specific test results for the report printout.

1. Result List Template

- a. Select “New Template”
 - i. Select “New Template”
 - ii. Enter a name for the template
 - iii. “Save Template”
- b. Select test for the template
 - i. Select “New Result code”
 - ii. In the “result code” field enter test code or name depending on which search filter is selected.
 - iii. Select the test and then select “Save Result Code”
- c. Add additional test(s) for template
 - i. Make sure to select “New Result code” before entering each added result
 - ii. In the “result code” field enter test code or name depending on which search filter is selected.
 - iii. Select the test and then select “Save Result Code”

2. Edit an Existing Template

- a. Select “Result List Template” name from drop down menu
- b. Edit Options:
 - i. Select “Delete Template” to delete the designated template
 - ii. Select “New Result Code” to add an additional test to the template
 - iii. Select “Delete Result Code” to delete the selected test from the template
 - iv. Change the sequence of the individual tests on the template’s report
 1. Select a specific test
 2. Change the sequence number
 3. Select “Save Result Code”



NEW INSURANCE PROVIDER OPTIONS

Select “Master Files” and then “Insurance Provider” from the menu list at the top of the screen. This option allows a user to add an unlisted insurance to the local insurance provider list.

Note: This option is also available by selecting “Primary Insurer” or “Secondary Insurer” directly from the patient’s insurance screen.

1. New Insurance Providers

Make sure “Local” is the “Selected Provider” chosen at the top of the screen.

- a. Select “New Provider”

- b. Enter insurance provider information into the highlighted fields (Insurance Provider Name and Address)
- c. Select “Save Provider”

To select newly added insurance provider for patient’s information:

- d. Select Patient’s Insurance option
- e. Select “Local” Insurance Provider List
- f. Select insurance provider from drop down list



LABCORP ORDERS

If a patient has Blue Choice as their primary insurer, their lab orders must be sent to LabCorp. LabCorp orders can be placed in Atlas; resulting in a printable LabCorp requisition and LabCorp manifest.

1. Placing a LabCorp Order

- a. Select a patient with Blue Choice as their primary insurer
- b. Select “New Lab Order”
- c. On the Order Info Screen, complete the required fields (i.e. Physician, Date and Time of Service, etc)
- d. Select Continue
- e. On the Test Screen, select from the LabCorp Test Dictionary the test to be ordered

(Hint: To verify LabCorp tests are being ordered, “LabCorp Test Dictionary” should appear green in the upper right hand corner of the Test Screen)

- f. Select Continue
- g. Enter ICD-9 codes
- h. Select Continue
- i. LabCorp requisition will automatically print

2. Printing a LabCorp Manifest

- a. Select “Send Orders to Lab”
(One manifest will print for the labs electronically sent to Palmetto Health Richland and a separate manifest will print for the labs that were placed on LabCorp requisitions.)

Note: LabCorp orders are NOT actually sent electronically to LabCorp by Atlas. Therefore, results will NOT appear in the Atlas system.



QUICK HINTS

- The Palmetto Health Richland Laboratory Manual link can be found at the bottom right of the screen
- While scrolling over certain “action words” (i.e. Order, Historical) a small arrow appears. Selection of the arrow menu allows the choice to toggle between printing or viewing as a default for that particular report. The “information” selection tells more about the “action word’s” function.
- You can select “previous” (top middle-right) to go back to the last screen seen.
- User name and Atlas site selected can be found at the bottom of the screen
- Order Notes shortcut (when applicable): You can select the “Order Notes” for a drop down menu to select pre-typed comments.
- Print Spanish or Russian ABN:
 - Go to patient’s Demographic Screen
 - Select Spanish or Russian from the drop down menu in the language field
 - Reprint ABN (see *Pending Orders*)