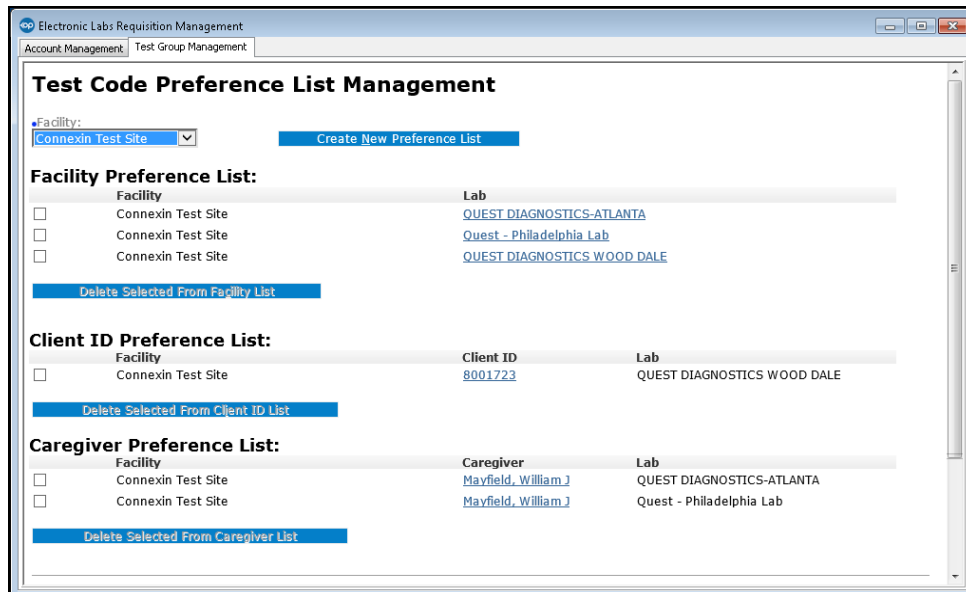## Creating and Maintaining an eLabs Preference List

Note: To create and maintain a Preference List, you must have System Administrator permissions in Office Practicum and must have the Practice Administrator credentials in the ELABS Correspondents table.

The Preference List functionality in eLabs allows the Practice to manage frequently used test codes for the eLabs interface and to define the Practice-wide favorites that display when the end user creates an eLabs order. This includes selecting a Facility Preference List, a Client ID Preference List, a Caregiver Preference List, and frequently used test codes.
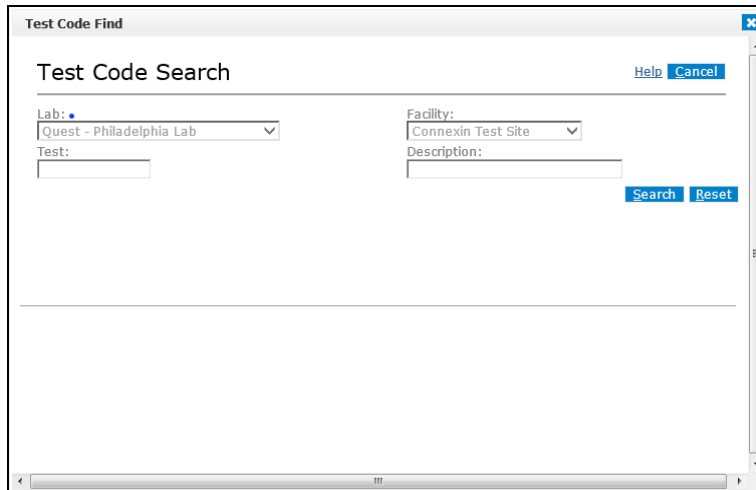
1. Access the **Electronic Labs Requisition Management** window by following the path: **Utilities** > **Manage Clinical Features** > **Electronic Labs Account Management.** This menu option displays only for logons with the permissions noted above.

The **Electronic Labs Requisition Management** window manages user accounts and Practice-specific eLabs settings (such as labs and Preference Lists) for the eLabs interface. Access to the **Account Management** tab is limited to our eLabs partner Change Healthcare. Clicking on it displays the message, "The user does not have Account Management permissions. Access is denied."

2. Click on the **Test Group Management** tab. OP 14 opens the **Test Code Preference List Management** window. This window allows you to manage the test codes that display when the end user creates an order using eLabs.

3. Click the **Facility** dropdown arrow and select the applicable practice location.

4. Click **Create New Preference List**. This window includes four sections (Step 1 through Step 4) for defining the Lab, Client, Caregiver and Test Code. To create a Test Code Preference List, you must ensure that the Facility and Lab fields are completed.
5. Select **Lab** from the dropdown in Step 1.
6. If the end user wants to create a Client ID- and/or Caregiver-specific Preference List, complete Step 2 and Step 3.
7. In the **Step 4** section, enter the lab **Test Code** and click **Enter**. If you do not know the test code, you can click the **Test Code Search** 📷 button. If you don't want the labs to display in alphabetical order, you can click the **Custom** button and then sort the labs by selecting and moving them up or down in the list.
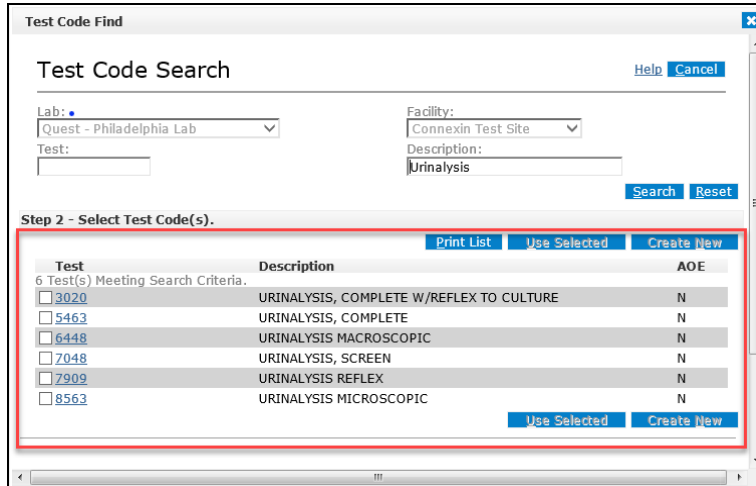8. When you click on the **Test Code Search** button, eLabs opens the **Test Code Search** window.

The **Lab** and **Facility** fields are populated with information from the **Test Preference List View** window and are not editable.

9. Either click in the **Test** field and enter a test code (numeric entry) or click in the **Description** field and enter a test description (alphabetic entry). You can use wildcards (for example *) in either field when searching. For example, when searching for any type of metabolic panel, using a wildcard before and after the search term "*metabolic*" returns a list of both types of panels (Basic and Comprehensive) with any term before and after the term "metabolic" (as depicted in the following screen capture).

Test	Description	AOE
17 Test(s) Meeting Search Criteria.		
☐ 10165	BASIC METABOLIC PANEL	N
☐ 10231	COMPREHENSIVE METABOLIC PANEL	N
☐ 17834	COMPREHENSIVE METABOLIC PANEL (REFL)	N
☐ 19108	BASIC METABOLIC PANEL W/O eGFR	N
☐ 19110	COMPREHENSIVE METABOLIC PANEL W/O eGFR	N
☐ 19113	BASIC METABOLIC PANEL W/O CA AND eGFR	N
☐ 19114	COMPREHENSIVE METABOLIC PNL W/O CO2, ALT, eGFR	N
☐ 19115	COMPREHENSIVE METABOLIC PANEL W/O ALT AND eGFR	N
☐ 34388	BASIC METABOLIC PANEL W/O CA	N

10. Click the **Search** button. eLabs displays a list of test results.

11. Select the checkbox of each test that you want to add to the Preference List.
12. To print a list of the selected Test Codes (for reference or review purposes), click the **Print List** button.
13. Click the **Use Selected** button. eLabs returns you to the **Create New Test Code Preference List** window with the selected codes added to the Test section.
14. To add other tests to the Preference List, repeat Steps 7 through 13.
15. To remove a test from the list, click on the Facility in the Lab column, select the labs you want to remove, and click the **Remove Selected** button. This is the only method of removing a test code from the Preference List. If the eLabs user deletes a test code while completing an order (discussed below), that deletion does not remove the test code from the Preference List.
16. To save the Preference List, click the **Save** button.

Editing Test Codes in an Existing Facility Preference List

1. Complete Steps 1, 2 and 3 above.
2. Click on the **hyperlink** in the Lab column in the Facility Preference List. When editing the test codes of an existing eLabs Preference List, it is not usually necessary to change any of the settings in Steps 1--3.
3. You only need to add/remove test codes in Step 4 of the Edit Test Code Preference List following instructions in Step 7 above.
4. Continue with Steps 8 through 16 above.

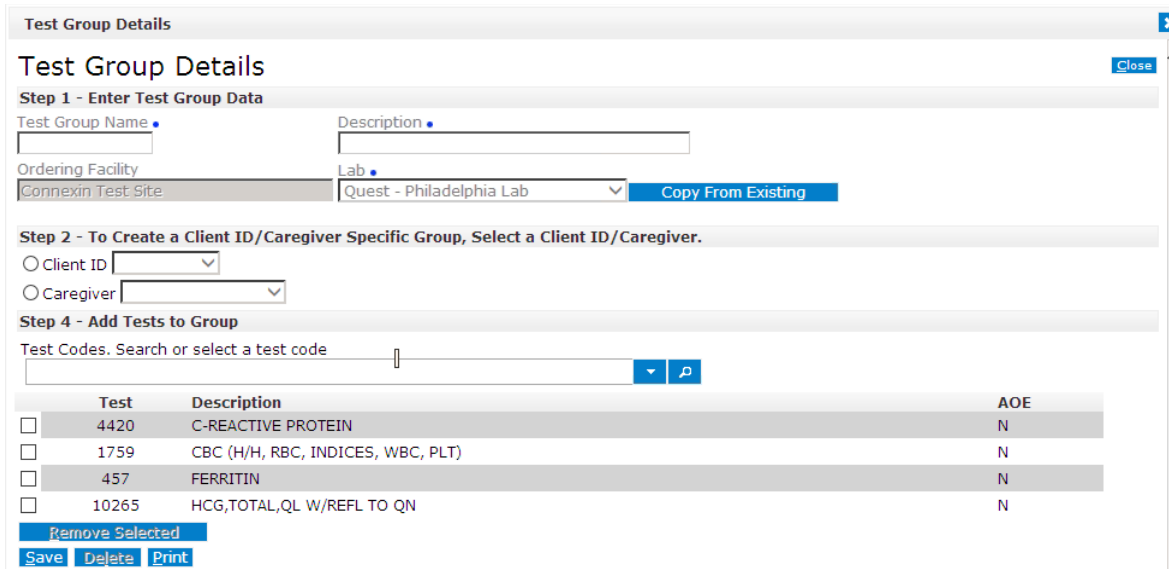## Adding Test Codes to a Preference List While Placing an eLabs Order

While placing an eLabs order (for details, refer to the Quick Reference Guide, *Creating an eLabs Requisition*), you can add tests to the Preference List. Additionally, you can create Test Groups (comparable to Panels) for multiple tests that practitioners frequently order together.

1. On the **eLabs Order** form, click on the **Test Code Search** button. eLabs opens the **Test Code Search** window (the same window used to create and maintain test codes in a Preference List) with the **Lab** and **Facility** fields displaying the selected lab and facility. These fields are not editable.

2. Either click in the **Test** field and enter a test code (numeric entry) or click in the **Description** field and enter a test description (alphabetic entry). You can use wildcards in these search fields.

3. Click the **Search** button. The eLabs interface displays a list of search results.

4. In the list of search results, select the tests that you want to add to the order and click the **Use Selected & Save to Preferences** button. The eLabs interface adds the selected tests to the order and also adds them to the Preference List.

Note: If you delete a test code while completing an order, that deletion does not remove the test code from the Preference List. To delete a test code from a Preference list, refer to the preceding section.

5. To create a Test Group, in the **Tests** section of the eLabs Order form, select the tests you want to add to a test group.

6. Click the **Save As Test Group** button. The eLabs interface displays the **Test Group Details** window.

7. In the **Test Group Name** field, enter a unique name for the Test Group.

8. In the **Description** field, enter a brief description of the Test Group, such as an abbreviation of the tests in the group.

9. In the **Lab** field, select the appropriate Lab.

10. To create a client-specific Test Group, click the **Client ID** radio button and select a client from the dropdown menu.

11. To create a caregiver-specific Test Group, click the **Caregiver** radio button and select a caregiver from the dropdown menu.

12. Ensure that the list of tests in the group is correct.

    a. To delete a test, select its checkbox and click the **Remove Selected** button.

    b. To add a test, either click the **Test Codes** dropdown arrow and select a test or enter a search in the **Test Codes** field, click the 🔍 button, and select the test.

13. To delete the entire Test Group, click the **Delete** button.

14. To save the Test Group, click **Save**.

15. To edit an existing Test Group, in the Test Groups section of the eLabs Order form, click on the name of the Test Group and follow Step 7 through Step 14.