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Default Lab Facility

Set Default Lab for Type


1. Navigate to Diagnostic Tests: **Clinical Tab > More button (Customize Group) > Diagnostic Tests.**
2. Click the **Lab Facilities** tab.
3. Highlight the lab facility you would like to set as default for type.
4. Click the **Edit** button .
5. Select the checkbox in the **Default for Type** column.

Note: If there are any other facilities for that type that have Default for Type checked, edit the facility to remove the Default for Type checkmark.

6. Click the **Save** button .

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Adding a Diagnostic Test

1. Navigate to Diagnostic Tests: **Clinical Tab > More button (Customize Group) > Diagnostic Tests.**
2. Click the **Test Name Definitions** tab.
3. Click the **Filter** button in the **Lab** group heading, and select the checkbox for a lab facility.
4. Click the **+** to expand and view the entries for that facility.
5. Confirm the test you want to add is not already created.
6. Click the **Add** button . The Diagnostic Test Name Information window is displayed.
7. Complete the fields below.

- **Laboratory:** Click the drop-down and select from the list.
- **Test name:** Click in the field and type the test name.
- **Purpose:** Click the drop-down and select from the list.

Note: This will affect how a test is ordered and/or resulted.

- **Order or Result:** When choosing this purpose the test will be used at the top level to order and also a line entry for a result (e.g., result the components and then indicate the overall result impression).
- **Order only:** When choosing this purpose the test will be used at the top level as an order only. There will be no result line entry.
- **Result only:** When choosing this purpose the test will be used to enter a result, typically this is used as a component of an order.

- **Category:** Click the drop-down and select from the list.

Note: The category selected will determine where the test is displayed in the patient chart.

- **LOINC:** Click in the field and type the LOINC code.

Note: Enter the LOINC code for the diagnostic test. The LOINC code must be entered exactly, including the hyphen.


- **Test ID:** The Test ID field populates with the code from the LOINC field, edit if necessary.
- **CPT code:** Click in the field and type the CPT code or click the **Ellipsis** button to search for one.
- *(Optional)* **Default DX code:** Click in the field and type the Dx code or click the **Search** button.
- **Result type:** Click the drop-down and select from the list.
 - **String:** A string of answers can be separated by semicolons (;) with the first answer being default; can specify default normal (N) and abnormal (A) flags for each entry by adding an = sign at the end and following with N or A.
 - **Numeric:** The answer contains numbers; can be formatted like a string set.
 - **Date:** Answer is a date.
 - **Time:** Answer is a time.
 - **Text:** Answer is in text format.
 - **Coded entry:** A list of answers can be separated by semicolons (;) with the first answer being default; can specify default normal (N) and abnormal (A) flags for each entry by adding an = sign at the end and following with N or A.
- *(Optional)* **Normal range:** Click in the fields and type the normal from and to range.
- *(Optional)* **Critical range:** Click in the fields and type the critical from and to range.
- *(Optional)* **Units / Display mask:** Click in the fields and type the units and display mask.

- (Optional) **Default result value(s)**: Click in the field and type result values based on the steps under Result Type.
 - **Default visibility**: Click the drop-down and select from the list. The default visibility is set to Any staff member.
8. Click the **OK** button.

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Creating and Linking Result Components to a Test Order

Create Result Components for a Diagnostic Test Order



1. Navigate to Diagnostic Tests: **Clinical Tab > More button (Customize Group) > Diagnostic Tests**.
2. Click the **Test Name Definitions** tab.
3. Click the **Filter** button in the **Lab** group heading, and select the checkbox for a lab facility.
4. Click the **+** to expand the entries for that facility.
5. Confirm the result component you want to add is not already created.
6. Click the **Add** button . The Diagnostic Test Name Information window is displayed.
7. Complete the fields below.
 - **Laboratory**: Click the drop-down and select from the list
 - **Test name**: Click in the field and type the test component name.
 - **Purpose**: Click the drop-down and select **Result Only**.
 - **Category**: Click the drop-down and select from the list.
 - **LOINC**: Click in the field and type the LOINC code.

Note: Enter the LOINC code for the diagnostic test. The LOINC code must be entered exactly, including the hyphen.
 - **Test ID**: The Test ID field populates with the code from the LOINC field, edit if necessary.
 - **CPT code**: N/A
 - (Optional) **Default DX code**: N/A
 - **Result type**: Click the drop-down and select from the list.
 - **String**: A string of answers can be separated by semicolons (;) with the first answer being default; can specify default normal (N) and abnormal (A) flags for each entry by adding an = sign at the end and following with N or A.
 - **Numeric**: The answer contains numbers; can be formatted like a string set.
 - **Date**: Answer is a date.


- **Time:** Answer is a time.
 - **Text:** Answer is in text format.
 - **Coded entry:** A list of answers can be separated by semicolons (;) with the first answer being default; can specify default normal (N) and abnormal (A) flags for each entry by adding an = sign at the end and following with N or A.
 - (Optional) **Normal range:** Click in the fields and type the normal from and to range.
 - (Optional) **Critical range:** Click in the fields and type the critical from and to range.
 - (Optional) **Units / Display mask:** Click in the fields and type the units and display mask.
 - (Optional) **Default result value(s):** Click in the field and type result values based on the steps under Result Type.
 - **Default visibility:** Click the drop-down and select from the list. The default visibility is set to Any staff member.
8. Repeat the steps above to add all result components.
 9. Click the **OK** button to save.

Link Result Components to a Diagnostic Test Order

Once you have created the result components you must add them to the diagnostic test order.

1. Navigate to Diagnostic Tests: **Clinical Tab > More button (Customize Group) > Diagnostic Tests.**
2. Click the **Test Name Definitions** tab.
3. Click the **Filter** button in the **Lab** group heading, and select the checkbox for a lab facility.
4. Click the + to expand the entries for that facility.
5. Click the **Access** button  next to the diagnostic test you would like to open.
6. Click the **Result Template** tab.
7. Click the **Add** button .
8. Start typing in the **Test Result Name** field or click the drop-down and select from the list.
9. Repeat the steps above until all lab results are added.



Note: To change the sort order, click into the sort order field and type a number.

10. Click the **Save** button .
11. Click the **OK** button.



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Customizing Lab Test Categories

Create a New Lab Test Category

1. Navigate to Diagnostic Tests: **Clinical Tab > More button (Customize Group) > Diagnostic Tests.**
2. Click the **Test Name Pick Lists** tab.
3. Click the **Activate** button.
4. Select the lab facility in the **Test Facility** column.
5. Click the **Add** button  in the Test Category field.
6. Click into the empty row and type the new category.
7. Click the **Save** button .

Grouping Tests into Categories

1. Navigate to Diagnostic Tests: **Clinical Tab > More button (Customize Group) > Diagnostic Tests.**
2. Click the **Test Name Pick Lists** tab.
3. Click the **Activate** button.
4. Select the lab facility in the **Test Facility** column.
5. Select a category in the **Test Category** column.
6. Click the **Add** button  in the Test Name field.
7. Start typing in the **Test Name** field or click the drop-down and select from the list.
8. Repeat the steps above to add all tests to the category.
9. Click the **Save** button .


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Maintaining Orders


Change the Privacy Level for a Diagnostic Test

If you need to change the visibility setting for a diagnostic test, you can edit the test's privacy level.

1. Navigate to Diagnostic Tests: **Clinical Tab > More button (Customize Group) > Diagnostic Tests.**
2. Click the **Test Name Definitions** tab.
3. Click the **Filter** button in the **Lab** group heading, and select the checkbox for a Lab Facility.
4. Click the + to expand the entries for that facility.
5. Click on the test you would like to change the privacy level for.
6. Click on the **Privacy Level** drop-down and choose from the list.

7. Click the **Save** button .
8. A pop-up is displayed and asks if you want to update the requisitions that include this test with a matching privacy level. Choose one of the following options.
 - Update requisitions:
 - a. Click the **Yes** button. A pop-up is displayed that shows the number of requisitions that include the test to be updated.
Note: If no requisitions include the test, a pop-up will display that information, click OK.
 - b. Select **Yes** to continue with updating the privacy level of the requisitions. A pop-up displays the update is complete.
 - c. Click the **OK** button.
 - Do not update requisitions:
 - a. Click the **No** button.

Archiving a Diagnostic Test or Result

1. Navigate to Diagnostic Tests: **Clinical Tab > More button (Customize Group) > Diagnostic Tests.**
2. Click the **Test Name Definitions** tab.
3. Click the **Filter** button in the **Lab** group heading, and select the checkbox for a Lab Facility.
4. Click the **+** to expand the entries for that facility.
5. Select the diagnostic test or result component that you'd like to archive.
6. Click the checkbox in the **Archived** column.
7. Click the **Save** button .
8. A confirmation box window will appear. Click **Yes** or **No**.

Note: The window is referring to a circumstance in which you're updating the Privacy Level of a Diagnostic Test. This is not pertinent to archiving, select **Yes** or **No**.

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