

# Create and Maintain a Preference List

## QRG

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The Preference List functionality in eLabs allows your Practice to manage frequently used test codes for the eLabs interface and to define the practice-wide favorites that display when users create eLab orders. In most cases, a Preference List has already been uploaded into OP prior to your Practice going live with eLabs. In order to populate the Preference List, the Practice will need to provide a Utilization Compendium to OP.

### Create an eLabs Preference List

1. Navigate to the Electronic Labs Requisition Management window: **Admin tab > E-Labs Administration**.
2. Click the **Test Group Management** tab.
3. Click the **Facility** drop-down to select a Facility.
4. Click the **Create New Preference List** button. The Test Preference List View window is displayed.
5. Click the **Lab** drop-down and select a Lab.  
**Note:** Client ID and Caregiver are optional fields. They may be selected if the Test Code Preference List you are adding is for a specific client or caregiver.
6. Complete the **Step 4 - Add Test Code to List** section of the window.
  - a. Click the **Search** button  to open the Test Code Find window.
  - b. The **Lab** and **Facility** fields are populated with information from the Test Preference List View window and cannot be edited.
  - c. In the **Test** field, enter the name of the Test. Or, in the **Description** field, enter the Description.
  - d. Click the **Search** button.  
**Note:** You can use \* as a wildcard 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 tests containing the word *metabolic*.
  - e. Select the checkbox(es) next to the Test(s) that you want to add to the Preference List and click the **Use Selected** button.
  - f. Repeat the above steps until all lab tests have been added.
  - g. Click the **Save** button.
7. Click the **Close** button.

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### Add Test Codes While Completing an eLabs Order

Labs can be added to the Preference List while you're placing an eLabs order from the patient's chart.

1. Complete the Send-Out Lab Requisition in OP choosing **Electronic** as the Order Type.
2. Confirm the information on the Lab Order.
3. Add a Test Code:
  - a. Click the **Search** button in the Test(s) section.
  - b. The **Lab** and **Facility** fields are populated with information from the Test Preference List View window and cannot be edited.
  - c. Enter the name of the **Test** or **Description**, and click the **Search** button.  
**Note:** You can use \* as a wildcard 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 tests containing the word *metabolic*.
  - d. Select the checkbox(es) next to the Tests that you want to add to the Preference List and click the **Use Selected & Save to Preferences** button. The selected tests are added to the order and the Preference List.  
**Note:** If you delete a Test Code while completing the Order, the deletion does not remove the Test from the Preference List. Click [here](#) to jump to the Remove Test from the Preference List section below.
5. Proceed with completing the steps to Validate and Print and Send the Lab Order.

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### Create, Edit, and Delete Test Groups

#### Create a Test Group

1. Complete the Send-Out Lab Requisition in OP choosing **Electronic** as the Order Type.
2. Confirm the information on the Lab Order.
3. Select all of the Tests that you wish to add to the group in the Test(s) section, and click the **Save as Test Group** button. The Test Group Details window displays.
4. Complete the following information:
  - a. In the **Test Group Name field**, enter the name of the Test Group. The name field is the link you select to add, edit or remove tests within the Test Group.
  - b. In the **Description** field, enter a description for the group. The description is displayed in the Test Groups section.
  - c. Select the **Client ID** radio button and select the Client ID from the drop-down.  
**Note:** If you wish to create the group by Caregiver, click the Caregiver radio button and select a Caregiver from the drop-down list. If Caregiver is selected, Client ID will be deselected.
  - d. Select the checkbox(es) next to the Test(s) that you want to add to the group and click the **Use Selected** button.

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- e. Click the **Save** button.
- f. Select the **Close** button.

### Edit or Delete a Test Group

1. Complete the Send-Out Lab Requisition in OP choosing **Electronic** as the Order Type.
2. Confirm the information on the Lab Order.
3. In the Test Groups section, click the name of the **Test Group** to edit.
4. Complete the following steps in the Test Group Details window to add or remove a Test:

#### Add a Test

- a. From the Add Test to Group section, click the drop-down or begin typing the name of the Test and select it from the list.
- b. Click the **Save** button.
- c. Click the **Close** button.

#### Remove a Test

- a. Select the checkbox(es) for each Test you want to remove.
- b. Click the **Remove Selected** button.
- c. Click the **Save** button.
- d. Click the **Close** button.

#### Delete the Test Group

- a. Click the **Delete** button. A message displays confirming you want to delete the group,
- b. Click the **OK** button in the confirmation window.

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### Remove Test(s) from the Preference List

1. Navigate to the Electronic Labs Requisition Management window: **Admin tab > E-Labs Administration**.
2. Click the **Test Group Management** tab.
3. Click the **Facility** drop-down, and select a Facility from the list.
4. In the Facility Preference List section, click on the name of the Lab in the Lab column.
5. In the Test Preference List View window, click the checkbox(es) for the Test(s) you want to remove.
6. Click the **Remove Selected** button.
7. Click the **OK** button in the confirmation window.
8. Click the **Save** button.
9. Click the **Close** button.

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