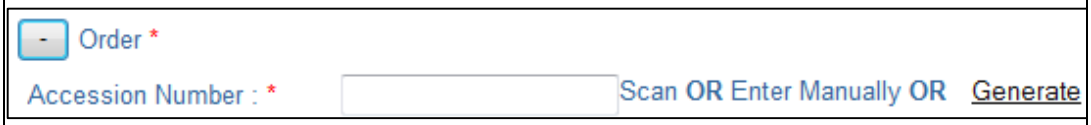
Job Aid: How to create a test order

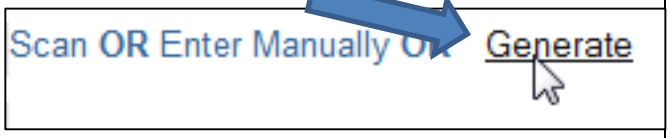
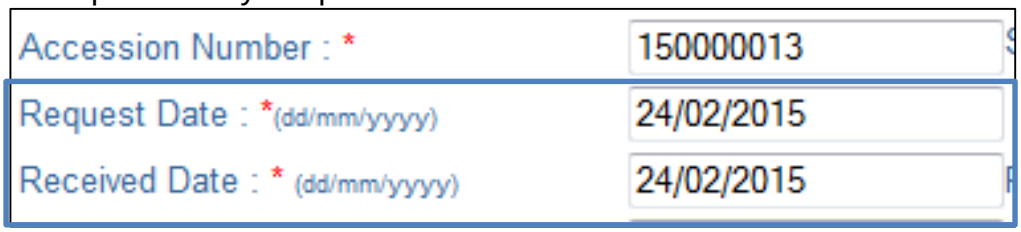
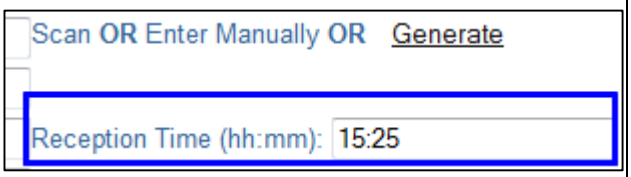
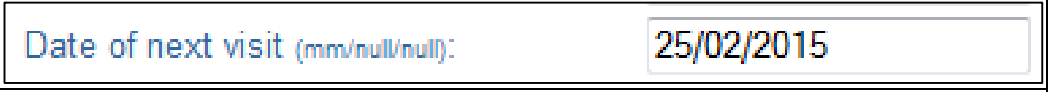
Objective :	Create a test order in OpenELIS
Task :	Order tests to be done on one or more patient samples.
When :	When a patient arrives at the lab to have a sample taken or when samples are received by the laboratory.
Who :	Laboratory receptionist
Required materials :	Sample, test order, computer with OpenELIS installed, user login

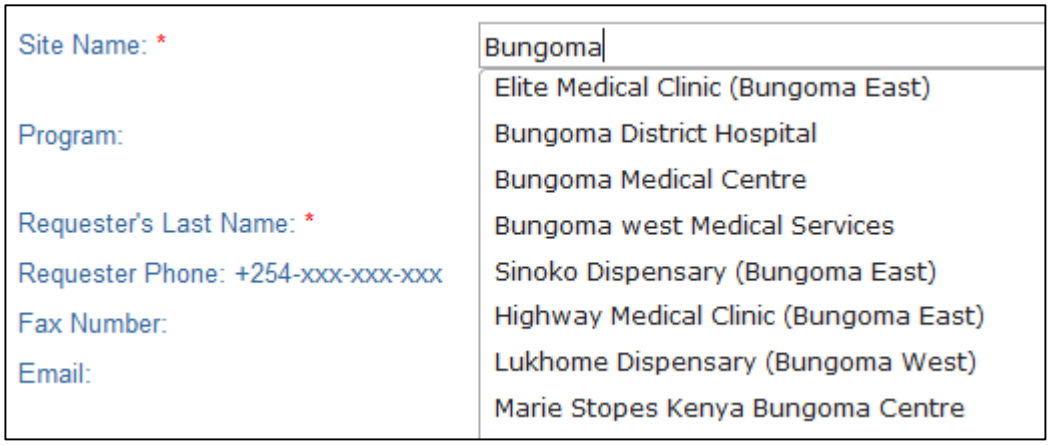
Notes :	The order entry page is divided into three sections : • Order : General order information • Sample : information about the sample and tests • Patient: demographic information about the patient Fields marked with a red star *must be filled.

Section 1: Order

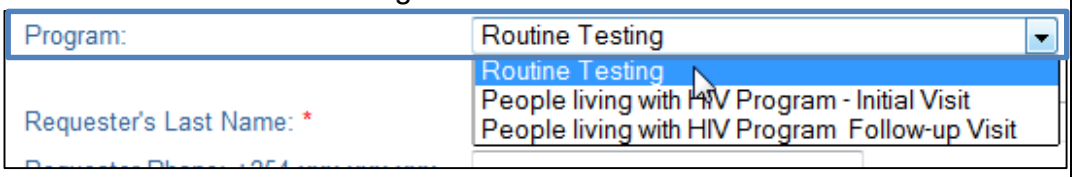
Step	Action
1.	Move the mouse to the **Order** tab on the main menu. A drop down menu will appear. Select and click on **Add Order**.
2.	 Use one of the following ways to enter the order's **Accession Number**. Note that an Accession Number cannot be re-used.

If	Then
You have a scanner and the sample has a bar code label	Scan the sample's bar code label. The **Accession Number** will automatically be filled.
The order already has an	Type this number into the **Accession**

	accession number	**Number** field.
	The order does not have an accession number	Click on **Generate**.  An **Accession Number** will automatically be assigned to the order and appear in the field.
3.	The **Request Date** and the **Received Date** automatically display today's date. Review the **Request Date** and the **Received Date** against the test order provided by the patient.  Update these fields by typing in the day, month, and year. If the DD/MM/YYYY format is not respected, the field will be outlined in red to highlight the error. **Note** : The **Received Date** corresponds to the date that the sample was actually received by the laboratory.	
4.	Enter the **Reception Time** using the hour: minute format.	
5.	Enter the **Date of next visit**. This is the date when the patient is expected to pick up their test results. 	
6.	Begin typing in the **Site Name** of the facility that ordered the tests. Select the correct facility name from the drop down list that appears.	

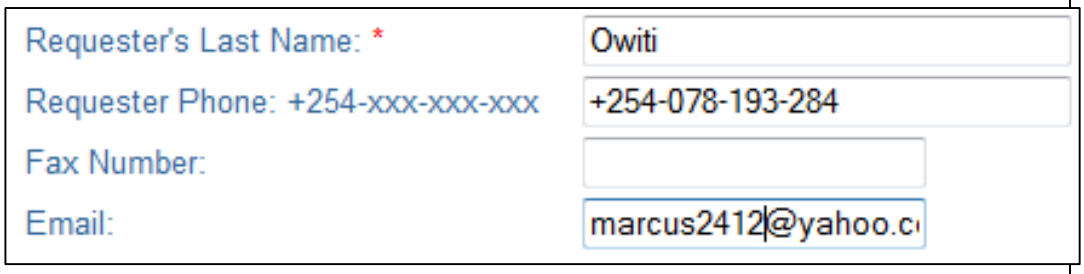


7. Using the drop down menu, choose the **Program** and type of test request being made: Routine Testing, HIV Program – Initial Visit, or HIV Program – Follow Up Visit.
Note: Orders that do not originate with the CCC should select Routine Testing.



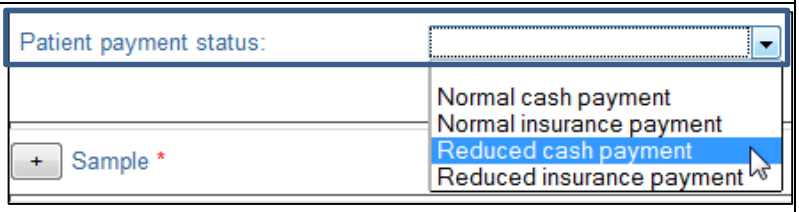
8. In the **Requestor's Last Name** and **First Name** fields, type in the name of the clinician ordering the tests.

9. Fill in the clinician's contact information
   - Telephone number
   - Fax number
   - Email



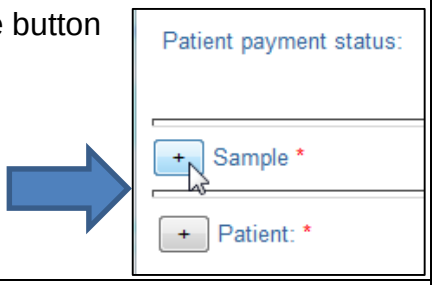
Note : The telephone number must respect the format indicated: +254-XXX-XXX-XXX. Using a different format will result in the field highlighted in red and you will be unable to save the form.

10. Use the drop down menu to highlight and select the correct **Patient Payment Status**.

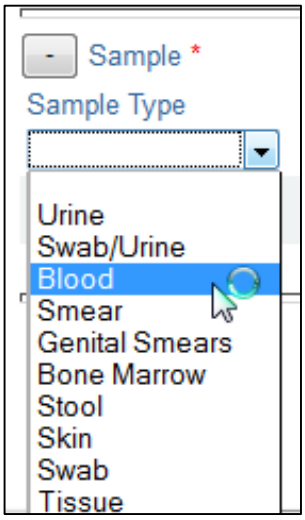


Section 2: Sample

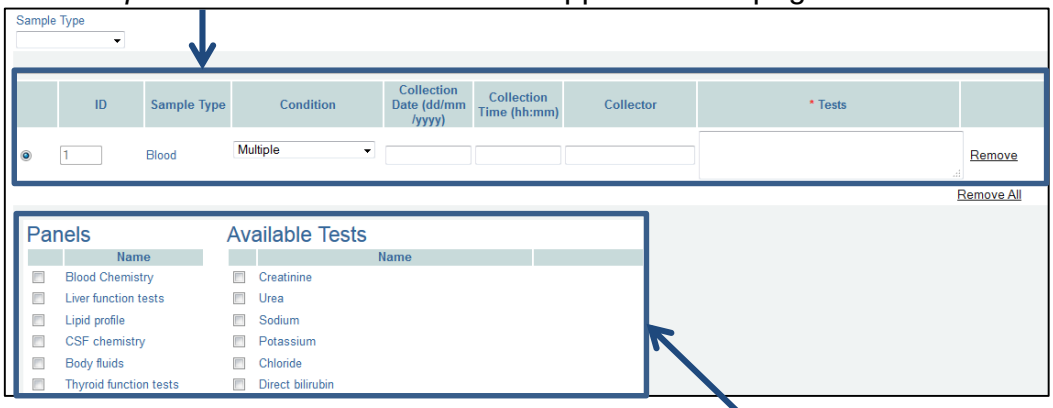
11. To open this section of the form, click on the button next to **Sample***



12. Select the **Sample Type** from the options provided in the drop down menu.



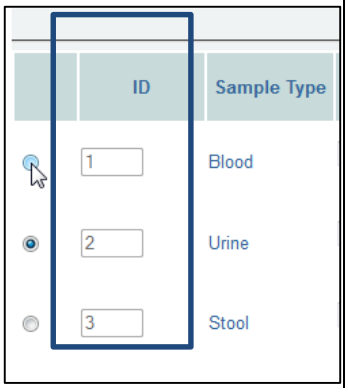
The *sample test order table* below will appear on the page.

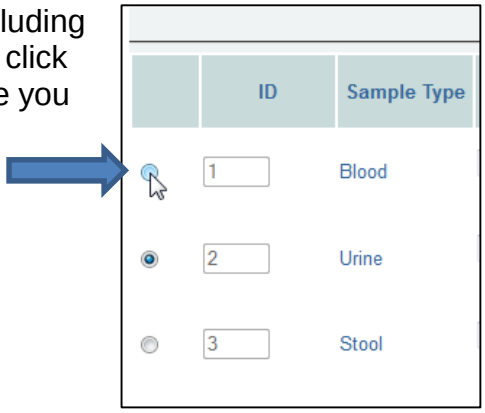
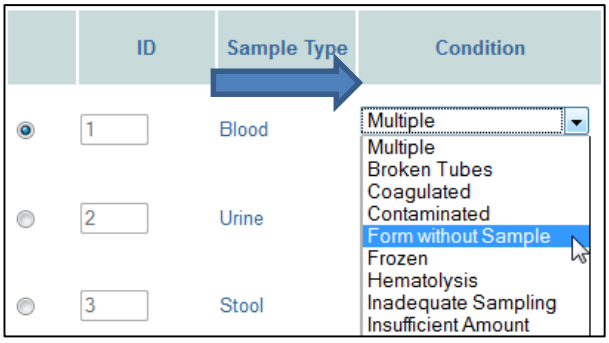
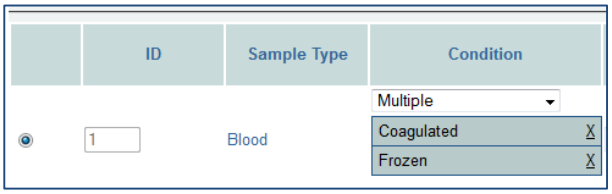
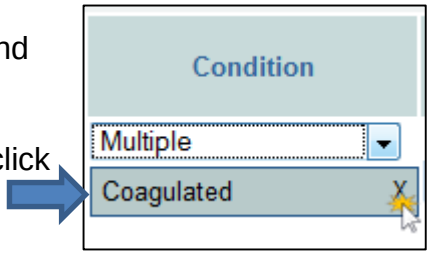
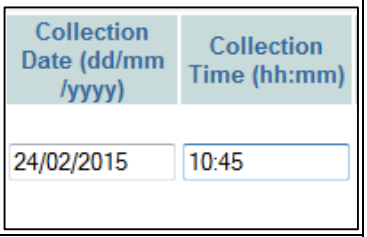
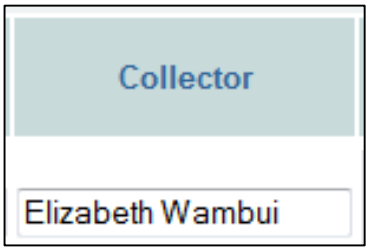


Note: Based on the sample type selected, a list of *panels and available tests* associated with the selected sample type will appear below the *sample test order table*.

13. Each sample type that you select is automatically assigned a sequential **ID** number, based on the order in which you enter it.

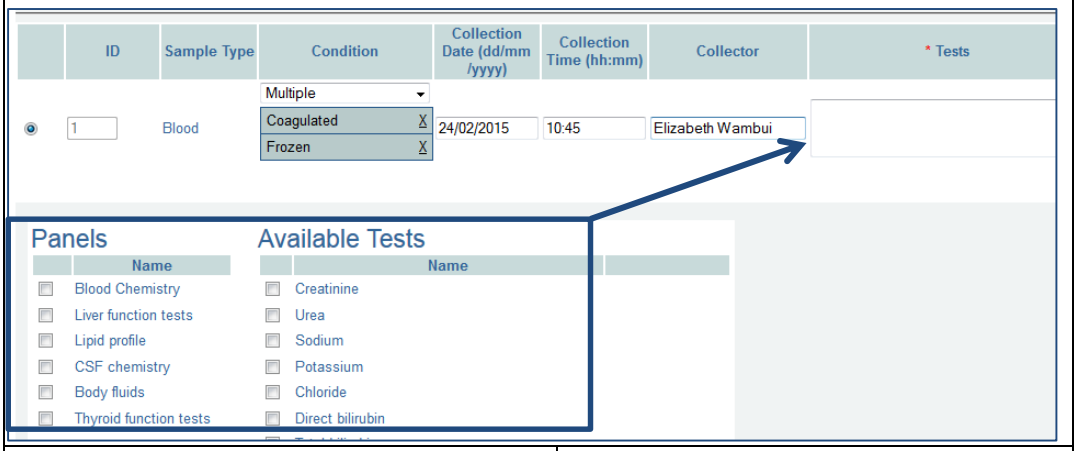
This ID is added to the accession or order number so that the tests ordered for each sample have a unique number (ie: 150000013-1, 150000013-2, etc).



14.	To enter more data on each sample, including all tests to be performed on the sample, click on the radio button in front of the sample you want to record test orders. 
15.	Indicate the sample's condition by selecting and clicking on a condition listed on the drop down menu.   The condition will appear under the drop down menu. To add more than one condition, select another condition from the drop down list and click on it. If you have clicked on a condition in error, click on the "**X**" next to the condition to delete it. 
16.	Type in the sample's actual **Collection Date** and **Collection Time**. 
17.	Fill the name of the laboratorian collecting the sample in the **Collector** field. 

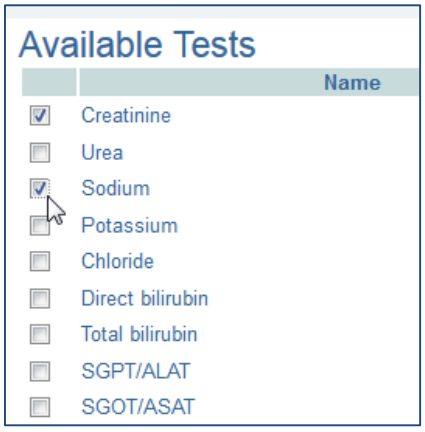
18. To enter the tests to be conducted on each sample, use the “Panel” and “Available Tests” menus below the *sample test order table*.

Note that you cannot type anything into the **Tests** field.

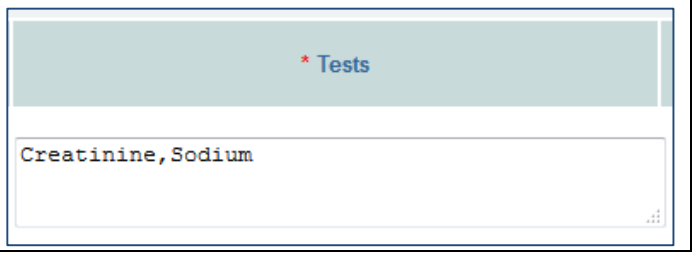


If	Go to
Add individual tests	Step 19
Add tests by panel	Step 20

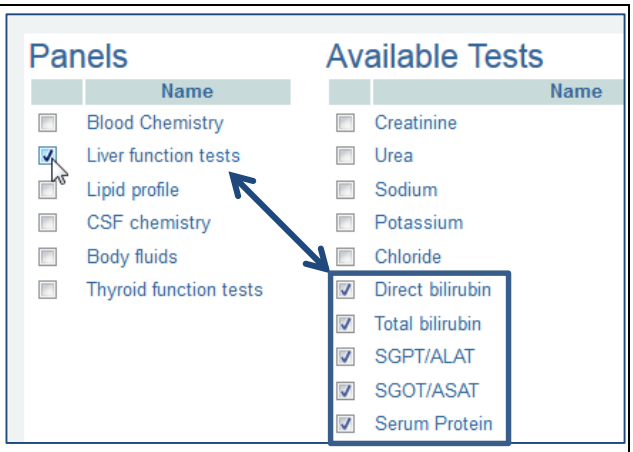
19. Select individual tests from the list of **Available Tests** by clicking on the check box in front of the test name.



Selected tests are automatically displayed in the “Tests” column of the *sample test order table*.



20. From the **Panels** list, tick the check box that correspond to the panel that you want to order.

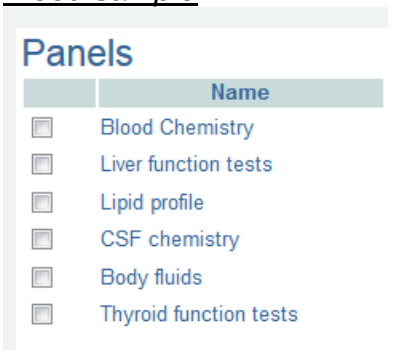


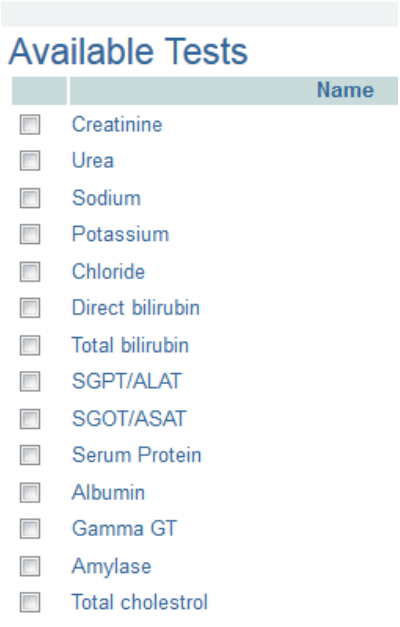
Once you select a panel, a group of corresponding tests that will automatically selected from the "Available Tests" section.

It is possible to choose several panels and tests for each sample. If you choose a panel, you can always de-select or add specific tests by ticking the check box in front of the panel or test.

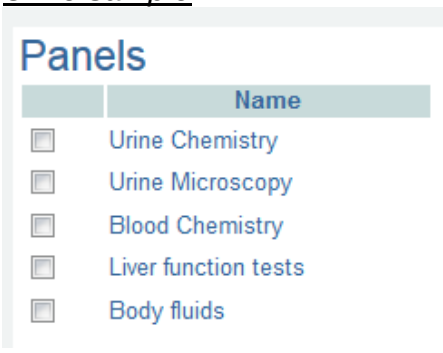
Note: The number of panels and tests available for a sample depends on the nature of the sample (blood, swab, smear, etc).

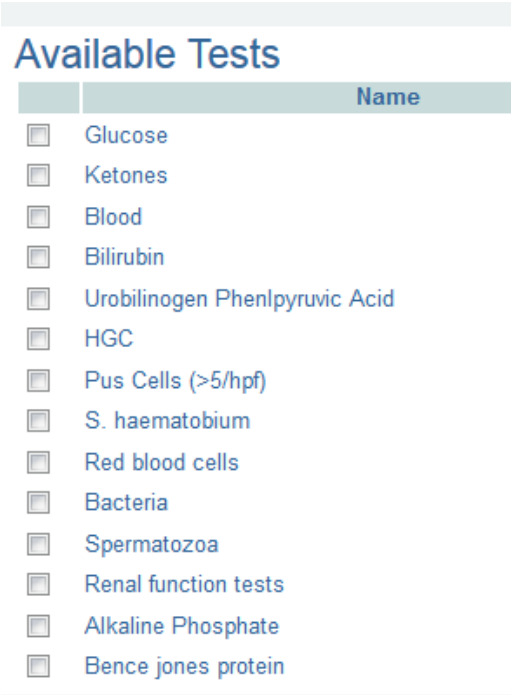
Blood sample

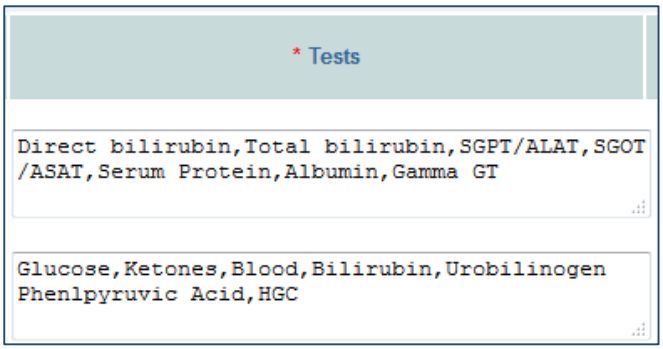
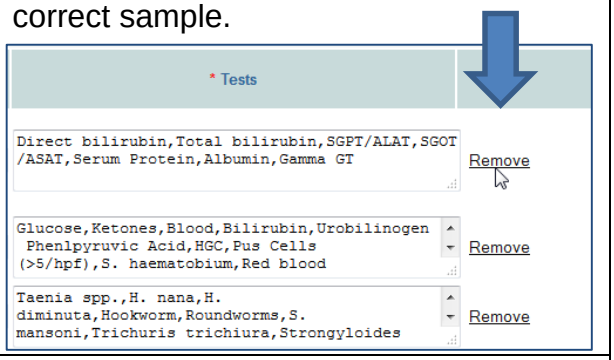
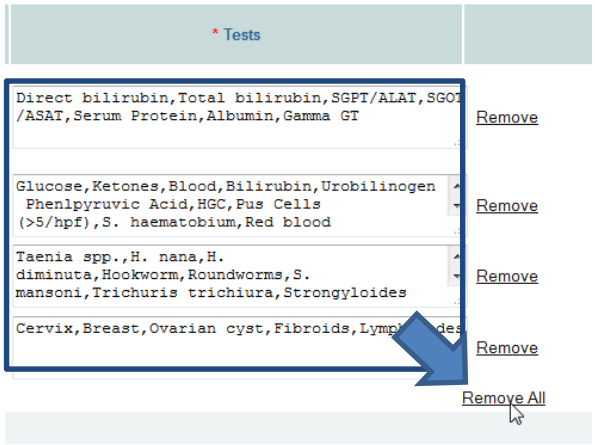


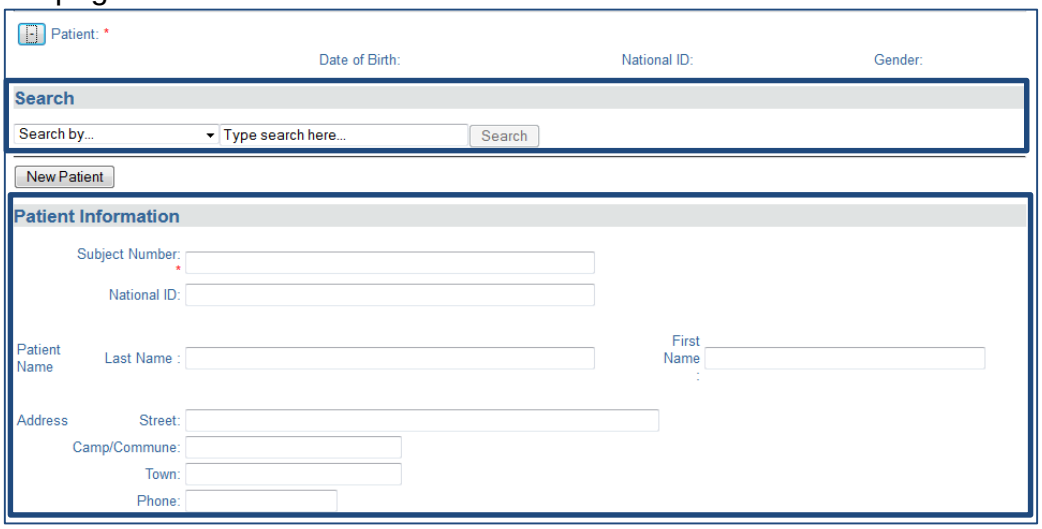
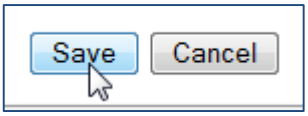
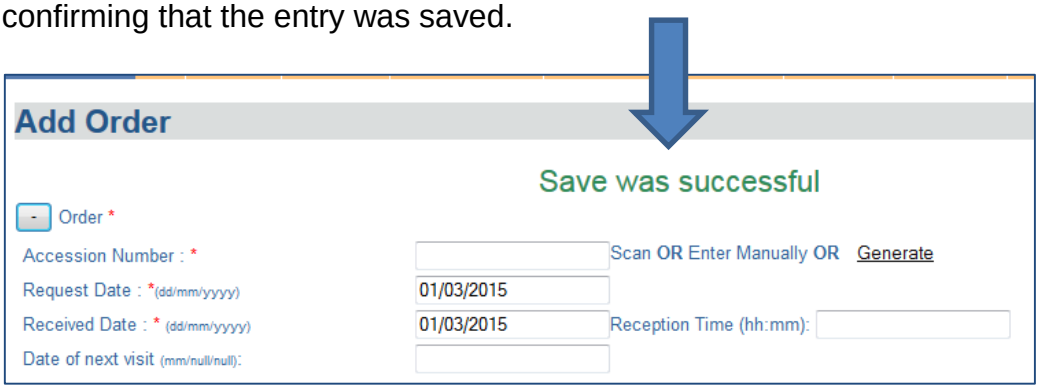


Urine sample





	Tests for the selected panel are automatically displayed in the “Tests” column of the *sample test order table*.	
21.	**If…**	**Go to …**
	The test order is for several types of samples	Return to **Step 12** to add another sample to the *sample test order table*.
	You added an incorrect sample to the *sample test order table*,	Click on the “**Remove**” hyperlink at the end of the row for the incorrect sample. Then return to **Step 12** to add the correct sample. 
	You want to remove all samples and tests from the *sample test order table,*	Click on the “**Remove All**” hyperlink at the bottom of the Remove column. Then return to **Step 12** to add the correct samples. 
	All samples associated with the test order have been added,	Continue with **Step 22**.

Section 3: Patient			
22.	Open the Patient section by clicking on the plus button next to **Patient.** A **Search** section and a **Patient Information** section will be displayed on the page.  **Note** that this section has several required fields and must be completed in order for the sample and test orders to be saved.		
23.	Search for the patient's record. For details on searching for a patient in the OpenELIS database, see *Job Aid: How to Search for a Patient*.		
24.	**If…**		**Then…**
	The correct patient's record is available		Confirm the patient's information. Then go on to **Step 25**.
	A record that corresponds to the patient does not appear		Create a new patient record. See *Job Aid: Creating a Patient Record* for guidance.
	Note: Once you have selected the patient or created a new patient record, the Save button will become active.		
25.	If the Save button	is active and you have completed entering the order	click on **Save**. 
		is not active	review the form and confirm that all required fields have been filled.
26.	This task is complete and the order has been entered into the system		

	when a new order entry page is displayed and you receive a message confirming that the entry was saved.