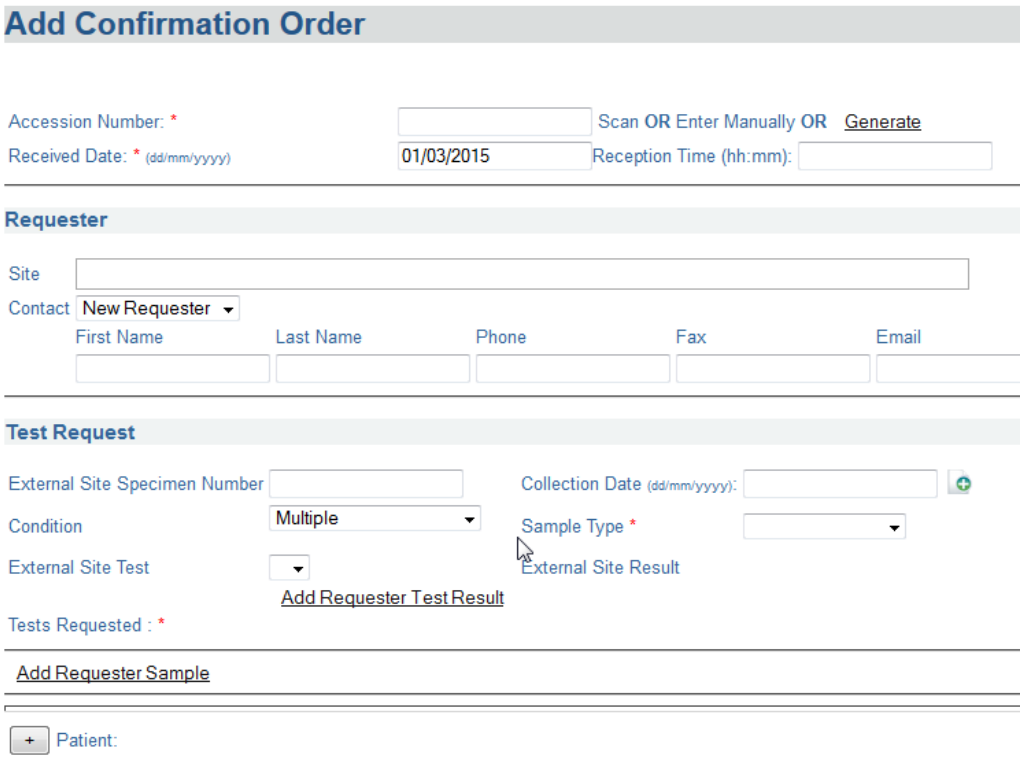
Job Aid : How To Enter Test Orders Referred To Your Laboratory For Confirmation Testing

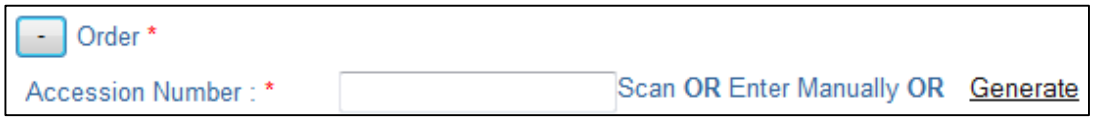
Objective :	Use OpenELIS to enter test orders for all samples referred to the laboratory for additional or confirmation testing.
Task :	Fill in all data related to a confirmation test order.
When :	When other laboratories send samples for confirmation testing.
Who :	Laboratory personnel receiving samples
Required materials :	Sample, confirmation test order, computer with OpenELIS installed, login credentials
Notes :	Fields marked with a red asterix * are mandatory.

Step	Action
1.	Move the mouse over the **Test** tab and click on the **Add Confirmation Order** tab.

The **Add Confirmation Order** form will appear on the page.

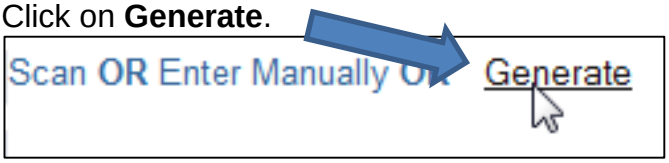


2.

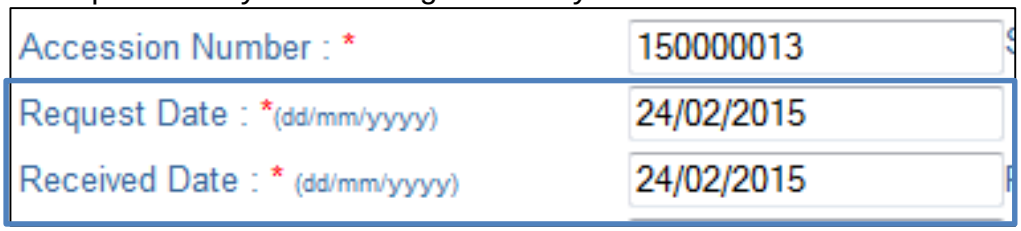


Use one of the following ways to enter the order's **Accession Number**.

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 accession number	Type this number into the **Accession 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.

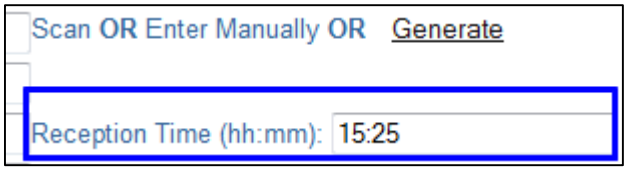
3. The **Request Date** and the **Received Date** automatically display today's date. Review the **Request Date** and the **Received Date** against the test order provided by the referring laboratory.



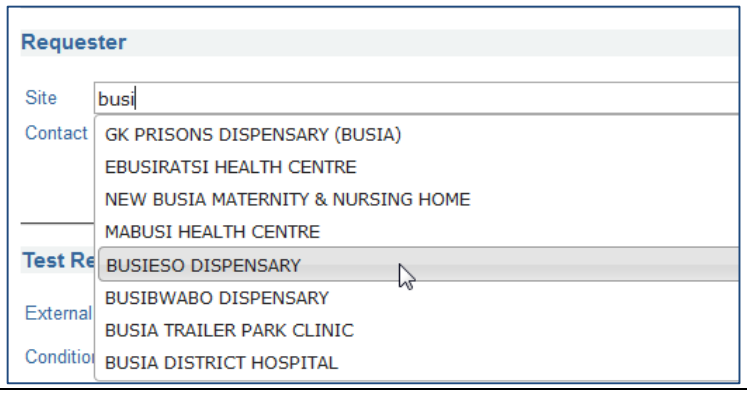
Update these fields by typing in the day, month, and year. If the DD/MM/YYYY format is not respected, the field will be outlined in red to highlight the error.

<table>
<tr><td></td><td>

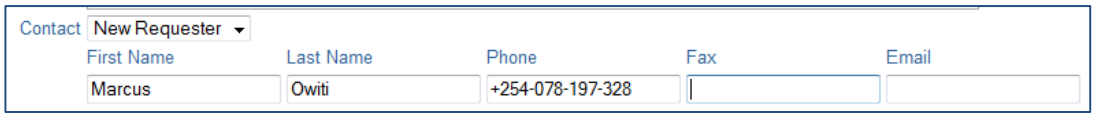
Note : The **Received Date** corresponds to the date that the sample was actually received by the laboratory.</td></tr>
<tr><td>4.</td><td>Enter the Reception Time using the hour: minute format.

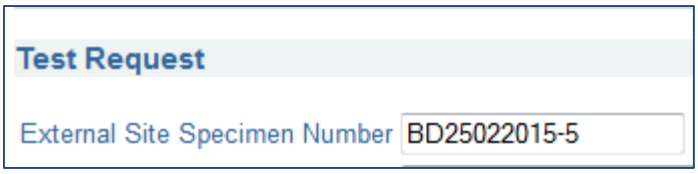

</td></tr>
<tr><td colspan="2">Requesting Site Information (Requester)</td></tr>
<tr><td>5.</td><td>Begin typing in the name of the Site that referred the sample to your laboratory. A drop down list of facility names that contain the letters you type in will appear.

Select and click on the correct site name.

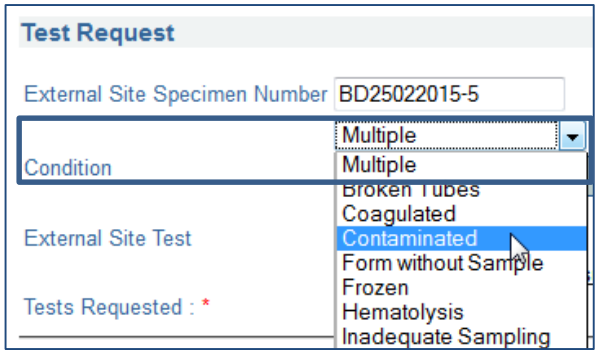
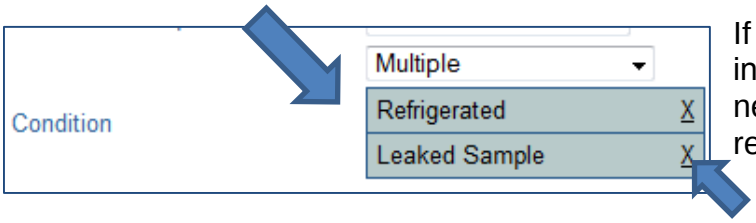
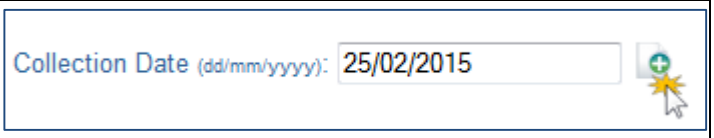
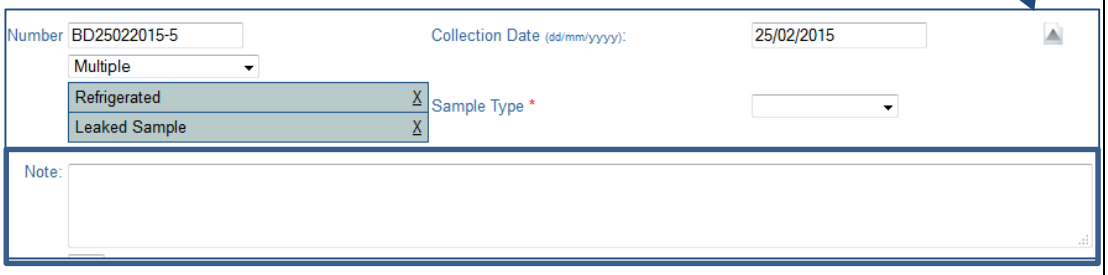
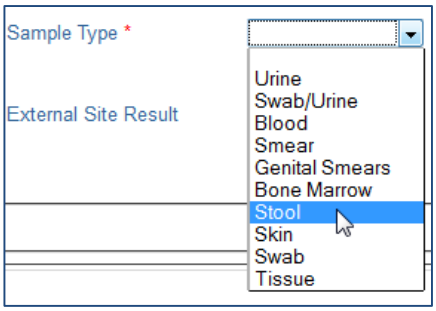

</td></tr>
<tr><td>6.</td><td>Fill the contact information of the person referring the tests to your laboratory.:

- First name
- Last name
- Phone
- Fax
- Email

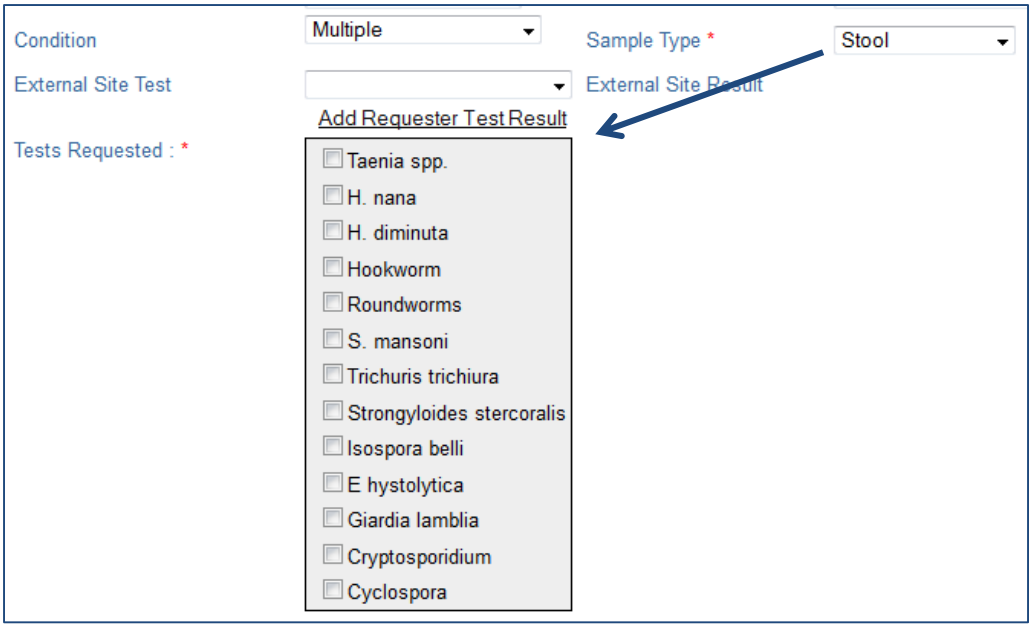

</td></tr>
<tr><td colspan="2">Test Request</td></tr>
<tr><td>7.</td><td>Type in the External Site Specimen Number assigned to the sample by the referral site (requestor).



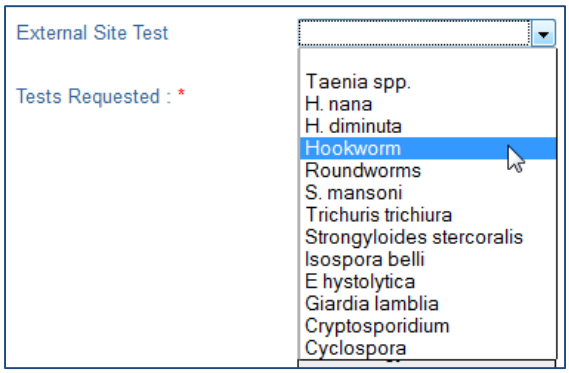
Note that the new sample number, assigned to the sample by your laboratory, will be the order or Accession Number and the specimen ID number that is assigned to each sample during referral sample entry in OpenELIS.</td></tr>
</table>

8.	In the **Collection Date** field, enter the date the sample was taken from the patient by the requesting laboratory. **Note** that the dd/mm/yyyy format must be respected.
9.	Select the option from the drop down list that best corresponds to the current **Condition** of the sample.  **Note** that you can choose more than one condition: each condition selected will appear below the drop down menu.  If you select a condition in error, click on the "X" next to the condition to remove it from the form.
10.	Click on the icon to open a text field for **Notes**.  Type any notes regarding the sample into this field, then click on the icon to close the **Notes** field. 
11.	Select the **Sample Type** from the options provided in the drop down list.  **Note :** The sample type selected will trigger the following to be displayed : • A drop down list of External Site Test, where the tests conducted by the referring site can be entered. • A list of Tests Requested, where the tests

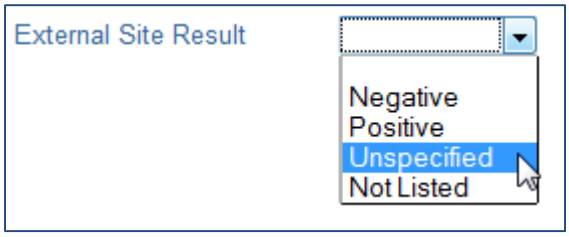
ordered by the referring site can be selected. This list only contains those tests associated with the selected sample type.



12. From the **External Site Test** drop down list, select the test originally conducted by the referring laboratory.

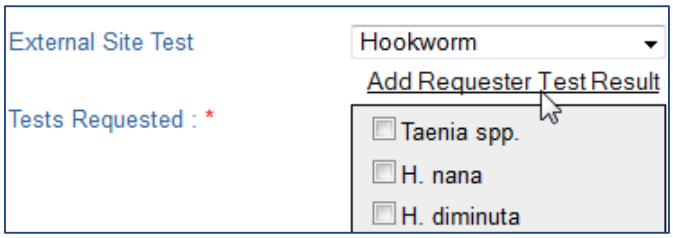
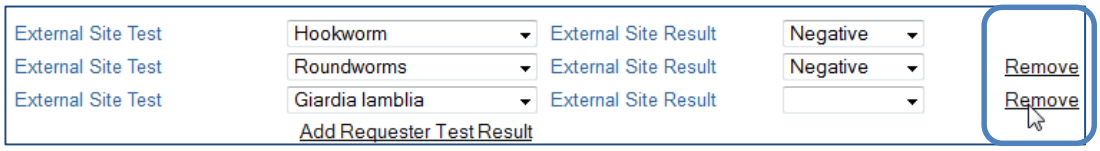
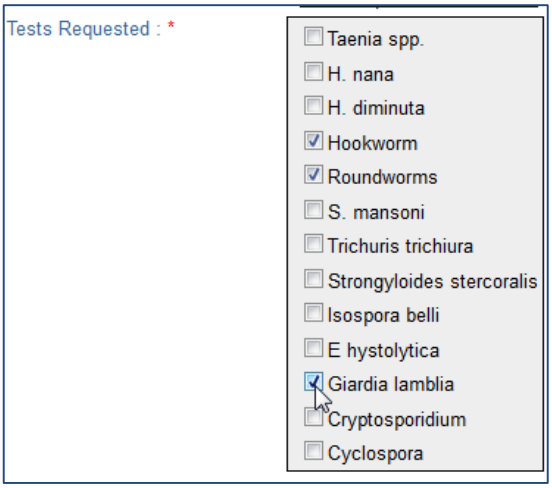
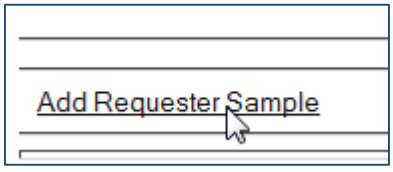


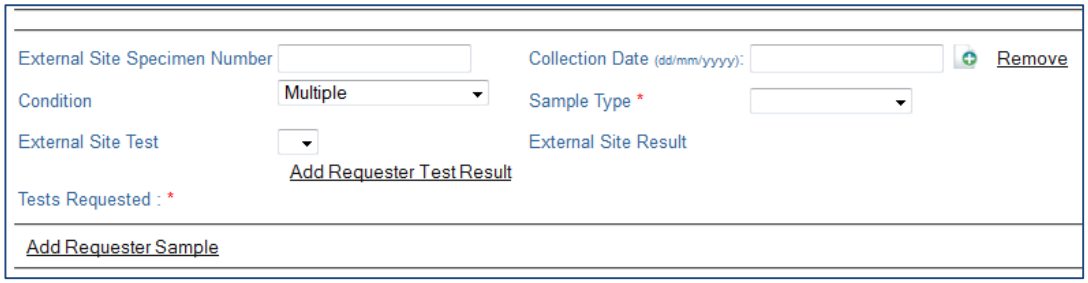
13. Fill in the **External Site Result** by selecting and clicking on the correct option displayed on the drop down list.



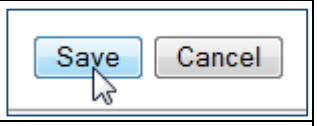
14.

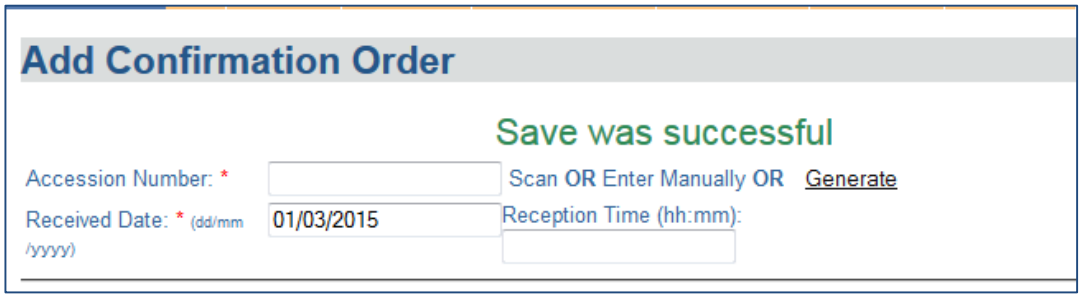
If…	**Go to…**
The referring site has other tests orders to enter	Step 15
You have entered a test result in error	Step 16
You have entered all test orders and original results for the samples from the referring site,	Step 17

15.	Click on **Add Requester Test Result**.  A new line will appear with **External Site Test** and **External Site Result** fields. Return to **Step 12** and enter the test data into these fields.	
16.	Click on the **Remove** hyperlink to the right of the test result that you want to delete. 	
17.	Click on the tick boxes next to the new or confirmation **Tests Requested** by the referring laboratory. 	
18.	If…	Go to….
	You have other samples for this patient from the same referring site that you want to add to this confirmation order	Step 19
	You have finished entering all samples and confirmation test orders for this patient from the same referring site,	Step 20
19.	Click on **Add Requester Sample** at the bottom of the **Test Request** section.  A new, blank set of **Test Request** fields will appear below those that you just filled.	

<table>
<tr><td></td><td> 

Return to Step 7 to fill in the details for the remaining confirmation test orders.</td></tr>
<tr><td>20.</td><td>Click on the to the left of Patient to open a new part of the field where patient information associated with the confirmation test order and sample can be added.

Note: For confirmation orders, patient information is not required.</td></tr>
<tr><td>21.</td><td><table>
<tr><td>If…</td><td>Then…</td></tr>
<tr><td>You do not have any patient information</td><td>Go on to Step 22</td></tr>
<tr><td>You have the patient’s information (ie : identification number) and you want to search OpenELIS for the patient’s record,</td><td>see Job Aid: How to Search for a Patient.</td></tr>
<tr><td>You have the patient’s information and you cannot find the patient’s record in OpenELIS,</td><td>see Job Aid: Creating a Patient Record for guidance.</td></tr>
</table></td></tr>
<tr><td>22.</td><td>Once all confirmation order information is entered, click on the Save button.
 
</td></tr>
<tr><td>23.</td><td>This task is completed once a new, blank Confirmation Order form appears as well as a message indicating that the data has been saved in OpenELIS.

 
</td></tr>
</table>