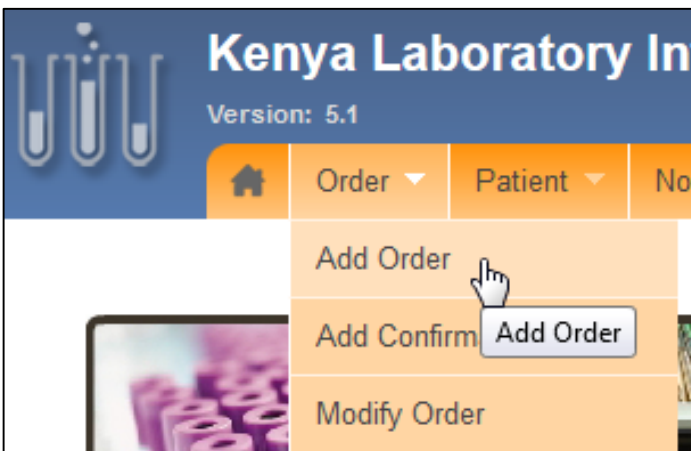






## Job Aid: How to create a test order

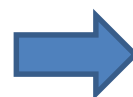
<p>Objective : Create a test order in OpenELIS</p> <p>Task : Order tests to be done on one or more patient samples.</p> <p>When : When a patient arrives at the lab to have a sample taken or when samples are received by the laboratory.</p> <p>Who : Laboratory receptionist</p> <p>Required materials : Sample, test order, computer with OpenELIS installed, user login</p>							
Notes :	<p>The order entry page is divided into three sections :</p> <ul style="list-style-type: none"> <li>• Order : General order information</li> <li>• Sample : information about the sample and tests</li> <li>• Patient: demographic information about the patient</li> </ul> <p>Fields marked with a red star * must be filled.</p>						
<b>Section 1: Order</b>							
Step	Action						
1.	<p>Move the mouse to the <b>Order</b> tab on the main menu.</p> <p>A drop down menu will appear.</p> <p>Select and click on <b>Add Order</b>.</p> 						
2.	<div>  <b>Order *</b> </div> <p>Accession Number : * <input type="text"/> Scan OR Enter Manually OR <a href="#">Generate</a></p> <p>Use one of the following ways to enter the order's <b>Accession Number</b>.</p> <p>Note that an Accession Number cannot be re-used.</p> <table border="1"> <thead> <tr> <th>If</th><th>Then</th></tr> </thead> <tbody> <tr> <td>You have a scanner and the sample has a bar code label</td><td> <p>Scan the sample's bar code label. The <b>Accession Number</b> will automatically be filled.</p>  </td></tr> <tr> <td>The order already has an</td><td>Type this number into the <b>Accession</b></td></tr> </tbody> </table>	If	Then	You have a scanner and the sample has a bar code label	<p>Scan the sample's bar code label. The <b>Accession Number</b> will automatically be filled.</p> 	The order already has an	Type this number into the <b>Accession</b>
If	Then						
You have a scanner and the sample has a bar code label	<p>Scan the sample's bar code label. The <b>Accession Number</b> will automatically be filled.</p> 						
The order already has an	Type this number into the <b>Accession</b>						

	accession number	<p><b>Number field.</b></p> <div> <input type="button" value="-"/> Order *         </div> <div>           Accession Number : * 150001112         </div>
	The order does not have an accession number	<p>Click on <b>Generate</b>.</p> <div>           Scan OR Enter Manually OR <u>Generate</u> </div> <p>An <b>Accession Number</b> will automatically be assigned to the order and appear in the field.</p> <div>           Accession Number : * 150000013         </div>
3.	<p>The <b>Request Date</b> and the <b>Received Date</b> automatically display today's date. Review the <b>Request Date</b> and the <b>Received Date</b> against the test order provided by the patient.</p> <div> <div>Accession Number : *</div> <div>150000013</div> </div> <div> <div>Request Date : * (dd/mm/yyyy)</div> <div>24/02/2015</div> </div> <div> <div>Received Date : * (dd/mm/yyyy)</div> <div>24/02/2015</div> </div> <p>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.</p> <div> <div>Received Date : * (dd/mm/yyyy)</div> <div>02/24/2015</div> </div> <p><b>Note :</b> The <b>Received Date</b> corresponds to the date that the sample was actually received by the laboratory.</p>	
4.	<p>Enter the <b>Reception Time</b> using the hour: minute format.</p>	<div> <input type="button" value="-"/> Scan OR Enter Manually OR <u>Generate</u> </div> <div> <div>Reception Time (hh:mm):</div> <div>15:25</div> </div>
5.	<p>Enter the <b>Date of next visit</b>. This is the date when the patient is expected to pick up their test results.</p>	<div> <div>Date of next visit (mm/null/null):</div> <div>25/02/2015</div> </div>
6.	<p>Begin typing in the <b>Site Name</b> of the facility that ordered the tests. Select the correct facility name from the drop down list that appears.</p>	

	<div> <div>Site Name: *</div> <div>Bungoma</div> </div> <div> <div>Program:</div> <div> Elite Medical Clinic (Bungoma East)  Bungoma District Hospital  Bungoma Medical Centre  Bungoma west Medical Services  Sinoko Dispensary (Bungoma East)  Highway Medical Clinic (Bungoma East)  Lukhome Dispensary (Bungoma West)  Marie Stopes Kenya Bungoma Centre </div> </div>
7.	<p>Using the drop down menu, choose the <b>Program</b> and type of test request being made: Routine Testing, HIV Program – Initial Visit, or HIV Program – Follow Up Visit.</p> <p><b>Note:</b> Orders that do not originate with the CCC should select Routine</p> <div> <div>Program:</div> <div> Routine Testing  Routine Testing  People living with HIV Program - Initial Visit  People living with HIV Program Follow-up Visit </div> </div> <p>Requester's Last Name: *</p> <p>Requester Phone: +254-xxx-xxx-xxx</p> <p>Fax Number:</p> <p>Email:</p> <p>Testing.</p>
8.	<p>In the <b>Requestor's Last Name</b> and <b>First Name</b> fields, type in the name of the clinician ordering the tests.</p> <div> <div>Requester's Last Name: *</div> <div>Owiti</div> <div>First Name:</div> <div>Marcus</div> </div>
9.	<p>Fill in the clinician's contact information</p> <ul style="list-style-type: none"> <li>• Telephone number</li> <li>• Fax number</li> <li>• Email</li> </ul> <div> <div>Requester's Last Name: *</div> <div>Owiti</div> <div>Requester Phone: +254-xxx-xxx-xxx</div> <div>+254-078-193-284</div> <div>Fax Number:</div> <div></div> <div>Email:</div> <div>marcus2412@yahoo.co</div> </div> <p><b>Note :</b> 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.</p>
10	<p>Use the drop down menu to highlight and select the correct <b>Patient Payment Status</b>.</p> <div> <div>Patient payment status:</div> <div> Normal cash payment  Normal insurance payment  Reduced cash payment  Reduced insurance payment </div> </div> <div> <div>+ Sample *</div> </div>

## Section 2: Sample

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



Patient payment status:

+ Sample \*

+ Patient: \*

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

- Sample \*

Sample Type

Urine

Swab/Urine

Blood

Smear

Genital Smears

Bone Marrow

Stool

Skin

Swab

Tissue

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

Sample Type

ID	Sample Type	Condition	Collection Date (dd/mm/yyyy)	Collection Time (hh:mm)	Collector	* Tests
1	Blood	Multiple				Remove

Remove All

**Panels**

Name
<input type="checkbox"/> Blood Chemistry
<input type="checkbox"/> Liver function tests
<input type="checkbox"/> Lipid profile
<input type="checkbox"/> CSF chemistry
<input type="checkbox"/> Body fluids
<input type="checkbox"/> Thyroid function tests

**Available Tests**

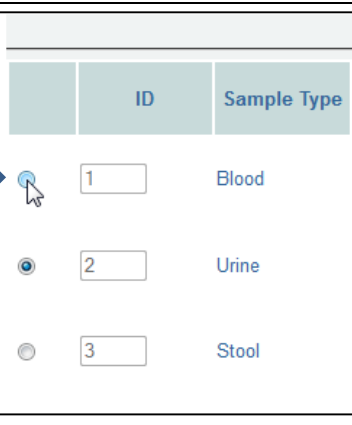
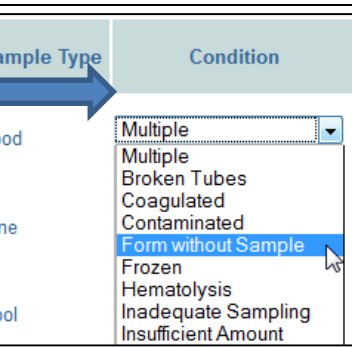
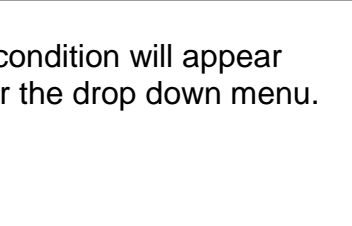
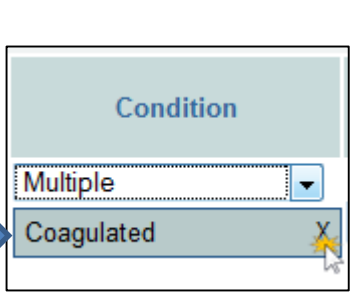
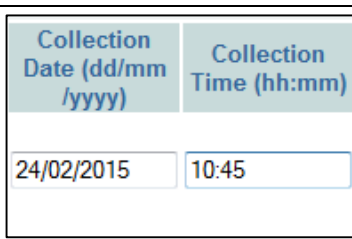
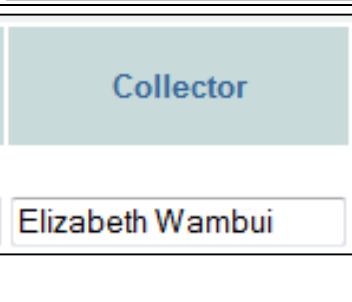
Name
<input type="checkbox"/> Creatinine
<input type="checkbox"/> Urea
<input type="checkbox"/> Sodium
<input type="checkbox"/> Potassium
<input type="checkbox"/> Chloride
<input type="checkbox"/> Direct bilirubin

**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).

ID	Sample Type
1	Blood
2	Urine
3	Stool

14.	<p>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.</p>	
15.	<p>Indicate the sample's condition by selecting and clicking on a condition listed on the drop down menu.</p>	  <p>The condition will appear under the drop down menu.</p> <p>To add more than one condition, select another condition from the drop down list and click on it.</p> <p>If you have clicked on a condition in error, click on the "X" next to the condition to delete it.</p> 
16.	<p>Type in the sample's actual <b>Collection Date</b> and <b>Collection Time</b>.</p>	
17.	<p>Fill the name of the laboratorian collecting the sample in the <b>Collector</b> field.</p>	

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.

ID	Sample Type	Condition	Collection Date (dd/mm/yyyy)	Collection Time (hh:mm)	Collector	* Tests
1	Blood	<div>Multiple</div> <div>Coagulated X</div> <div>Frozen X</div>	24/02/2015	10:45	Elizabeth Wambui	

**Panels**

Name
<input type="checkbox"/> Blood Chemistry
<input type="checkbox"/> Liver function tests
<input type="checkbox"/> Lipid profile
<input type="checkbox"/> CSF chemistry
<input type="checkbox"/> Body fluids
<input type="checkbox"/> Thyroid function tests

**Available Tests**

Name
<input type="checkbox"/> Creatinine
<input type="checkbox"/> Urea
<input type="checkbox"/> Sodium
<input type="checkbox"/> Potassium
<input type="checkbox"/> Chloride
<input type="checkbox"/> Direct bilirubin

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.

**Available Tests**

Name
<input checked="" type="checkbox"/> Creatinine
<input type="checkbox"/> Urea
<input checked="" type="checkbox"/> Sodium
<input type="checkbox"/> Potassium
<input type="checkbox"/> Chloride
<input type="checkbox"/> Direct bilirubin
<input type="checkbox"/> Total bilirubin
<input type="checkbox"/> SGPT/ALAT
<input type="checkbox"/> SGOT/ASAT

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

* Tests
Creatinine, Sodium

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).

Panels		Available Tests	
	Name		Name
<input type="checkbox"/>	Blood Chemistry	<input type="checkbox"/>	Creatinine
<input checked="" type="checkbox"/>	Liver function tests	<input type="checkbox"/>	Urea
<input type="checkbox"/>	Lipid profile	<input type="checkbox"/>	Sodium
<input type="checkbox"/>	CSF chemistry	<input type="checkbox"/>	Potassium
<input type="checkbox"/>	Body fluids	<input type="checkbox"/>	Chloride
<input type="checkbox"/>	Thyroid function tests	<input checked="" type="checkbox"/>	Direct bilirubin
		<input checked="" type="checkbox"/>	Total bilirubin
		<input checked="" type="checkbox"/>	SGPT/ALAT
		<input checked="" type="checkbox"/>	SGOT/ASAT
		<input checked="" type="checkbox"/>	Serum Protein

#### Blood sample

Panels	
	Name
<input type="checkbox"/>	Blood Chemistry
<input type="checkbox"/>	Liver function tests
<input type="checkbox"/>	Lipid profile
<input type="checkbox"/>	CSF chemistry
<input type="checkbox"/>	Body fluids
<input type="checkbox"/>	Thyroid function tests

#### Available Tests

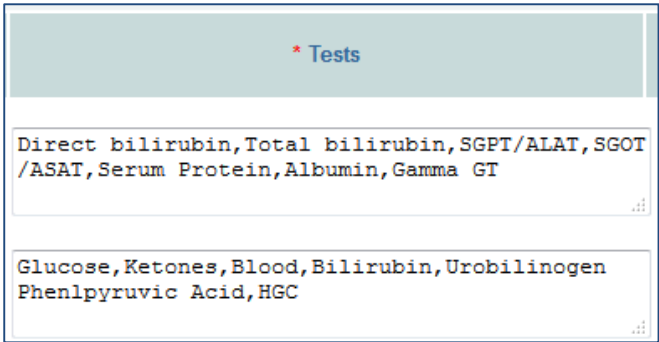
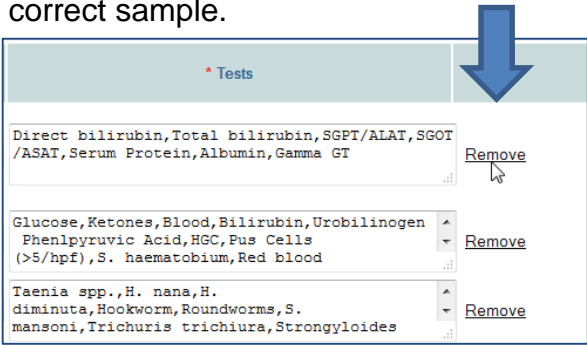
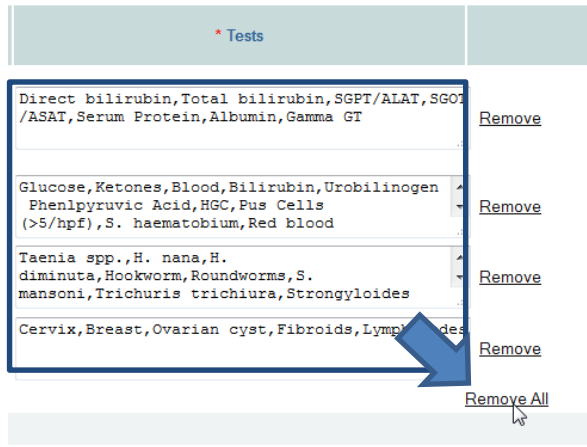
	Name
<input type="checkbox"/>	Creatinine
<input type="checkbox"/>	Urea
<input type="checkbox"/>	Sodium
<input type="checkbox"/>	Potassium
<input type="checkbox"/>	Chloride
<input type="checkbox"/>	Direct bilirubin
<input type="checkbox"/>	Total bilirubin
<input type="checkbox"/>	SGPT/ALAT
<input type="checkbox"/>	SGOT/ASAT
<input type="checkbox"/>	Serum Protein
<input type="checkbox"/>	Albumin
<input type="checkbox"/>	Gamma GT
<input type="checkbox"/>	Amylase
<input type="checkbox"/>	Total cholestrol

#### Urine sample

Panels	
	Name
<input type="checkbox"/>	Urine Chemistry
<input type="checkbox"/>	Urine Microscopy
<input type="checkbox"/>	Blood Chemistry
<input type="checkbox"/>	Liver function tests
<input type="checkbox"/>	Body fluids

#### Available Tests


	Name
<input type="checkbox"/>	Glucose
<input type="checkbox"/>	Ketones
<input type="checkbox"/>	Blood
<input type="checkbox"/>	Bilirubin
<input type="checkbox"/>	Urobilinogen Phenlpyruvic Acid
<input type="checkbox"/>	HGC
<input type="checkbox"/>	Pus Cells (>5/hpf)
<input type="checkbox"/>	S. haematobium
<input type="checkbox"/>	Red blood cells
<input type="checkbox"/>	Bacteria
<input type="checkbox"/>	Spermatozoa
<input type="checkbox"/>	Renal function tests
<input type="checkbox"/>	Alkaline Phosphate
<input type="checkbox"/>	Bence jones protein

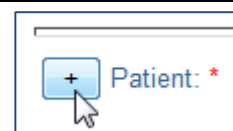
	<p>Tests for the selected panel are automatically displayed in the “Tests” column of the <i>sample test order table</i>.</p>	
21.	<b>If...</b>	<b>Go to ...</b>
	The test order is for several types of samples	Return to <b>Step 12</b> to add another sample to the <i>sample test order table</i> .
	You added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



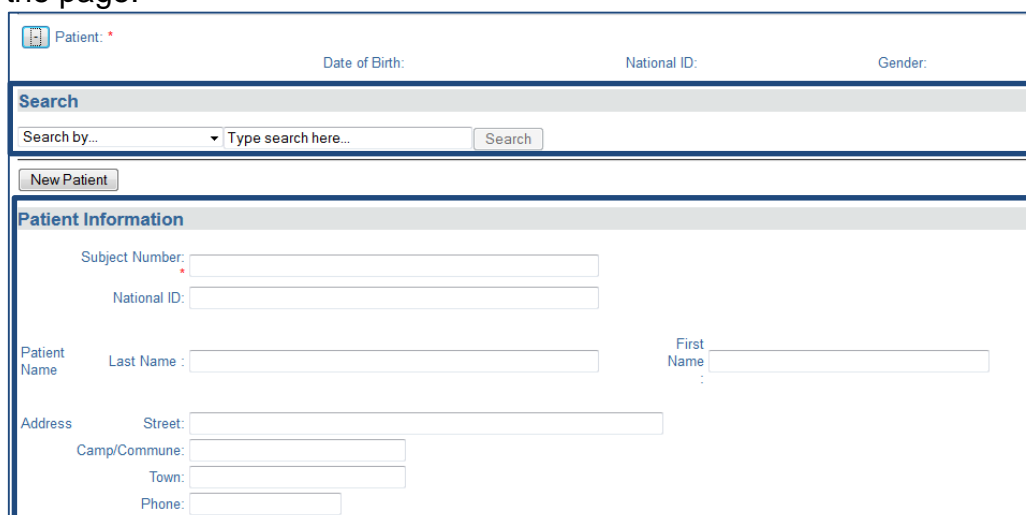
### Section 3: Patient

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.



The screenshot shows the Patient Information form. At the top, there are fields for Date of Birth, National ID, and Gender. Below these is a Search section with a dropdown menu for 'Search by...', a text input for 'Type search here...', and a 'Search' button. Below the search section is a 'New Patient' button. The main section is titled 'Patient Information' and contains several input fields: Subject Number, National ID, Patient Name (Last Name and First Name), Address (Street, Camp/Commune, Town, and Phone).

**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.

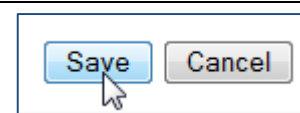
Note: Once you have selected the patient or created a new patient record, the Save button will become active.

- 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.



**Add Order**

Save was successful

Order \*

Accession Number : \*

Request Date : \* (dd/mm/yyyy)

Received Date : \* (dd/mm/yyyy)

Date of next visit (mm/null/null):

01/03/2015

01/03/2015

Scan OR Enter Manually OR

Generate

Reception Time (hh:mm):