

# **Howdy Computerized Phlebotomy Login Process C3-C1 Conversion Project**

## **Installation Guide**



**Laboratory Patch LR\*5.2\*405**

**January 2012**

Department of Veterans Affairs  
Office of Information and Technology (OIT)  
Office of Enterprise Development (OED)



# Revision History

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# Preface

The Veterans Health Information Systems and Architecture (VistA) Howdy Computerized Phlebotomy Login Process Installation Guide provides detailed instructions required for installing the **new** Howdy Computerized Phlebotomy Login Process (Howdy), Laboratory Patch LR\*5.2\*405 software application.

## Introduction

Patch LR\*5.2\*405 introduces the Howdy Computerized Phlebotomy Login Process as an automated laboratory check-in application which can be used within the Veterans Health Information Systems and Technology Architecture (VistA) Laboratory module. This software performs the following functions:

- Howdy automates laboratory check-in, accessioning of orders, and printing of specimen labels
- Howdy captures collection process times and provides the information required to create phlebotomy performance reports
- Howdy eliminates the need for a hand-written log book for sign-in where the patient's name and SSN can be compromised
- Howdy can utilize bar code technology to assist in the process of patient and specimen identification

## Blood Bank Clearance

VistA Laboratory Package Patch LR\*5.2\*405 contains changes to software controlled by VHA.

**EFFECT ON BLOOD BANK FUNCTIONAL REQUIREMENTS:** Patch LR\*5.2\*405 does not contain any changes to the VISTA BLOOD BANK Software as defined by VHA DIRECTIVE 2004-058 titled VISTA BLOOD BANK SOFTWARE VERSION 5.2.

**EFFECT ON BLOOD BANK FUNCTIONAL REQUIREMENTS:** Patch LR\*5.2\*405 does not alter or modify any software design safeguards or safety critical elements functions.

**RISK ANALYSIS:** Changes made by patch LR\*5.2\*405 have no effect on Blood Bank software functionality, therefore RISK is none.

**VALIDATION REQUIREMENTS BY OPTION:** Because of the nature of the changes made, no specific validation requirements exist as a result of installation of this patch.

## Recommended Users

The following staff is recommended for installing, implementing, and supporting the Howdy software:

- Information Resources Management (IRM) staff (installation)
- Laboratory Information Manager (LIM)/Automated Data Processing Application Coordinator (ADPAC) (implementation, setup, and support)

**Note:** IRM and LIM/ADPAC staff **must** coordinate the implementation of the setup tasks after the patch is installed.

# Orientation

Some of the sections contained in the Howdy Laboratory Patch LR\*5.2\*405 Installation Guide are:

- Introduction  
This section includes an overview of the major functions, purposes, and how the software application accomplishes the objectives.
- Pre-installation Considerations  
This section provides information needed prior to installing VistA Howdy Laboratory Patch LR\*5.2\*405.
- Installation Procedures  
This section contains instructions and examples of VistA Howdy Laboratory Patch LR\*5.2\*405.
- Backout/Uninstall Procedures  
This section contains screen captures of the backout process.
- Troubleshooting  
This section contains a printer troubleshooting guide and Frequently Asked Questions (FAQs).

## Software Retrieval and Documentation

### Software Changes

- This is a Laboratory patch with no changes to existing software
- Howdy uses the new LRHY\* namespace
- Sites will be required to install Patch LR\*5.2\*405, but implementation is optional

A new Item was created in Remedy for Howdy, Patch LR\*5.2\*405.

If you have any questions concerning the implementation of this application, contact the VA Service Desk at 1-888-596-4357 or directly log a Remedy ticket via Remedy Requester using

Category: Applications/Vista

Type: Lab 5.2

Item: Howdy

### Anonymous Software Directory

The VistA Howdy Laboratory Patch LR\*5.2\*405 files are available on the Office of Information Field Offices (OIFOs) ANONYMOUS SOFTWARE directory at the following FTP addresses:

OIFOs	FTP Address	Directory
Albany	<a href="ftp.fo-albany.med.va.gov">ftp.fo-albany.med.va.gov</a>	[anonymous.software]
Hines	<a href="ftp.fo-hines.med.va.gov">ftp.fo-hines.med.va.gov</a>	[anonymous.software]
Salt Lake City	<a href="ftp.fo-slc.med.va.gov">ftp.fo-slc.med.va.gov</a>	[anonymous.software]

**Note:** All sites are encouraged to use the File Transfer Protocol (FTP) capability. Use the FTP address **download.vista.med.va.gov** to connect to the first available FTP server where the files are located.



# Documentation

Documentation describing the new functionality introduced by this patch is available.

The preferred method is to FTP the files from <ftp://download.vista.med.va.gov/>. This transmits the files from the first available FTP server. Sites may also elect to retrieve software directly from a specific server as follows:

Albany	<a href="ftp.fo-albany.med.va.gov">ftp.fo-albany.med.va.gov</a>	<ftp://ftp.fo-albany.med.va.gov>
Hines	<a href="ftp.fo-hines.med.va.gov">ftp.fo-hines.med.va.gov</a>	<ftp://ftp.fo-hines.med.va.gov>
Salt Lake City	<a href="ftp.fo-slc.med.va.gov">ftp.fo-slc.med.va.gov</a>	<ftp://ftp.fo-slc.med.va.gov>

VistA Howdy Laboratory Patch LR\*5.2\*405 documentation files are available in the following names and formats:

<b>Document File Description</b>	<b>File Names</b>	<b>FTP Mode</b>
<i>Howdy Computerized Phlebotomy Login Process User Manual</i>	LR_5.2_405_UM.doc LR_5.2_405_UM.pdf	Binary
<i>Howdy Computerized Phlebotomy Login Process Technical Manual</i>	LR_5.2_405_TM.doc LR_5.2_405_TM.pdf	Binary
<i>Howdy Computerized Phlebotomy Login Process Installation Guide</i>	LR_5.2_405_IG.doc LR_5.2_405_IG.pdf	Binary
<i>Howdy Computerized Phlebotomy Login Process Release Notes</i>	LR_5.2_405_RN.doc LR_5.2_405_RN.pdf	Binary

VistA Howdy Laboratory Patch LR\*5.2\*405 manuals are also available in MS Word (.doc) format and the Portable Document Format (.pdf) on the VA Software Documentation Library in the Clinical Section <http://www4.va.gov/vdl/>

# Pre-installation Considerations

Sites are required to install Patch LR\*5.2\*405, but implementation is optional.

**Note:** Before starting the Howdy Laboratory Patch LR\*5.2\*405 installation, review the functional overview, technical components description, and software retrieval instructions in the LR\*5.2\*405 Patch Description.

1. Environment Check  
Programmer access is required to install this patch. Prior to installation, the installer must ensure the DUZ(0) variable is set to "@". This indicates the user has programmer access.
2. Users on the System  
This patch may be installed with users on the system.
3. Software Installation Time  
The estimated installation time for this patch is less than 3 minutes and should be done during non-peak hours.
4. Backup Routines  
There are no routines to back up. It is not necessary to Backup a Transport Global, because the routines contained in this patch are in a new namespace, **LRHY**.

## Notes for users of the Howdy Class 3 software:

- If you have used the Class 3 version of Howdy, make a backup ^DIZ(549186) global.
- If Howdy was previously installed as Class 3 software, your Howdy Site file will not merge with the new Class 1 software. Print out the current Howdy Site file settings (Class 3). Your site will need to repopulate the new Howdy Site file with your site-specific parameters.

# First Time Installation Requirements

## Test Accounts

Install and test the VistA Howdy Laboratory Patch LR\*5.2\*405 in a test account prior to installation into production accounts.

## Test Sites

Prior to release, VistA Howdy Laboratory Patch LR\*5.2\*405 was tested thoroughly at the following VAMCs using various types of systems.

Test Sites	Type of Systems	Scanner	Card Reader
Poplar Bluff	VistA	Hand Held 3800 Symbol LS4000i	None
Salisbury	VistA	Symbol	MagTek
Wilmington	VistA	Intermec SR30 USB hand held tethered scanner	Not using
Temple	VistA	Symbol LS2208	None

## Kernel Installation and Distribution System (KIDS)

The VistA Howdy Laboratory Patch LR\*5.2\*405 distribution uses KIDS. For further instructions on using KIDS, refer to the *Kernel Systems Manual V. 8.0*.

## Namespace

The VistA Howdy Laboratory Patch LR\*5.2\*405 namespace is LR and sub-namespace is LRHY. The files supported by this patch are: Howdy Site file (#69.86) and Howdy Specimen Times by UID (#69.87).

## VistA Software Application Requirements

Prior to installing VistA Howdy Laboratory Patch LR\*5.2\*405, you must verify the following applications are installed and fully patched.

Software Applications	Versions
Kernel	8.0
VistA Laboratory	5.2
VA FileMan	22.0
VA Mailman	7.1 or greater
Kernel Toolkit	7.3

# Howdy Hardware Requirements

## Howdy Traditional

### Patient Check-in Workstation

- **Magnetic strip reader that can read the magnetic strip or bar code scanner that can scan a VIC card.**

The magnetic strip reader or bar code scanner connects to the PC at the phlebotomy check-in desk. The patient swipes their VIC card through the reader to identify the patient and to begin the process of searching for valid lab orders.

- **PC or thin client with monitor and optional keyboard**

The PC monitor displays the results of the patient ID validation, the PC or the thin client provides the VistA connection that is used in searching for valid orders..

The keyboard allows the patient to enter the SSN into the system at check-in, if the scanning of the VIC card is unsuccessful.

**Note:** The use of a thin client allows increased security for patient interaction. Access can be limited to the VistA Howdy LRHY PATIENT CARD SCAN menu option only.

### Phlebotomy Area

- **Bar code label printer**

- a. Verify that the printer located at the check-in desk prints accession labels and/or order labels.

**Note:** Howdy recognizes only printers entered in the PRINTERS field (#10) of the HOWDY SITE file (#69.86).

- b. Verify the label printers selected for Howdy exist in the LABORATORY SITE file (#69.9), LABEL DEVICE multiplefield (#360).

- **PC or thin client with bar code reader (for optional use with the LRHY PHLEBOTOMY LOG menu option)**

- a. Follow the manufacturer's installation instructions to install the bar code reader connected to the PC.

- b. You can use a local employee ID badge, if the ID has a bar code.

- c. Verify that the reader captures the phlebotomist ID and scans the specimen label bar codes using the [LRHY PHLEBOTOMY LOG] menu option.

This information is used in the report generated by menu option [LRHY TRACK COLLECTION].

**Note:** If your ID badge does not have a bar code ID with your SSN embedded, you can generate an SSN bar code label from many web sites that generate bar codes free of charge.

## Laboratory Workstation for Lab Arrival (optional)

### PC or thin client with a bar code reader

1. Follow the manufacturer's installation instructions to install the bar code reader connected to the PC.
2. If your phlebotomy area is in a separate location from your testing laboratory, verify that you can scan the bar coded label on the specimens using the bar code reader as you receive the specimens into the laboratory using the [LRHY SCAN SPECIMENS INTO LAB] menu option.

This menu option is used to document the time between the accessioning of orders in the phlebotomy area and the arrival of specimens into the laboratory.

## Howdy Print at Point of Collection (PPOC)

### Patient Check-in Workstation

- **Magnetic strip reader that can read the magnetic strip or bar code scanner that can scan a VIC card**

The magnetic strip reader or bar code scanner connects to the PC at the phlebotomy check-in desk. When the VIC card is swiped, the program searches for lab orders on the patient indicated by the patient identifier embedded in the VIC.

- **PC or thin client with monitor and optional keyboard**

The PC monitor displays the results of the patient ID validation, the PC or thin client provides the VistA connection that is used in searching for valid orders.

The keyboard allows the patient to enter the SSN into the system at check-in, if the scanning of the VIC card is unsuccessful.

**Note:** The use of a thin client allows increased security for patient interaction. Access can be limited to the VistA LRHY PATIENT CARD SCAN (PPOC) menu option only.

### Phlebotomy Area

- **Public display board known as a bingo board**

The phlebotomy staff uses the bingo board to identify the next patient to report for specimen collection.

**Note:** The bingo board process was validated using a printer to verify functionality. Using a display monitor for the bingo board functionality was not tested, but may be included in a future release.

- **Multiple PCs, each with a monitor, keyboard, scanner, and bar code label printer**

The hardware requirements for Howdy PPOC are the same as for Howdy Traditional, except that each phlebotomist has a dedicated PC monitor, printer, and keyboard.

Each phlebotomist initiates printing of the specimen labels, after the samples are drawn. For this reason, no shared label printer is needed in the phlebotomy area.

## **Laboratory Workstation for Lab Arrival (optional)**

### **PC or thin client with a bar code reader**

If your phlebotomy area is in a separate location from your testing laboratory, verify that you can scan the bar coded label on the specimens using the bar code reader as you receive the specimens into the laboratory using the [LRHY SCAN SPECIMENS INTO LAB] menu option.

This menu option is used to document the time between the accessioning of orders in the phlebotomy area and the arrival of specimens into the laboratory.

# Installation Procedures

## Installation of Hardware

LR\*5.2\*405 uses printers as they are currently configured for lab usage. No special changes are required for implementation of this patch.

**Note:** All printers must already be in the DEVICE FILE (#3.5).

## Installing the Howdy Software

### INSTALLATION INSTRUCTIONS

-----  
This patch may be installed with users on the system although it is recommended that it be installed during non-peak hours to minimize potential disruption to users. This patch should take less than 5 minutes to install.

### Pre-Installation Instructions

- 
1. Choose the PackMan message containing this patch.
  2. Choose the INSTALL/CHECK MESSAGE PackMan option.
  3. From the Kernel Installation and Distribution System Menu, select the Installation Menu. From this menu, you may elect to use the following option. When prompted for the INSTALL enter the patch LR\*5.2\*405:
    - a. Compare Transport Global to Current System - This option will allow you to view all changes that will be made when this patch is installed. It compares all components of this patch (routines, DD's, templates, etc.)
    - b. Verify Checksums in Transport Global - This option will allow you to ensure the integrity of the routines that are in the transport global.
  4. From the Installation Menu, select the Install Package(s) option and choose the patch to install. (LR\*5.2\*405)
  5. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//' respond 'NO'
  6. When prompted 'Want KIDS to INHIBIT LOGONS during the install? NO//' respond 'NO'
  7. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO// respond 'NO'
  8. If prompted "Delay Install (Minutes): (0 - 60): 0//respond 0.

## Example Load Distribution Using PackMan Message

```
Select Core Applications Option: MAILMAN Menu

VA MailMan 8.0 service for MANAGER.SYSTEM@VISTA.DOMAIN.COM
You last used MailMan: 11/10/10@08:52

    NML    New Messages and Responses
    RML    Read/Manage Messages
    SML    Send a Message
           Query/Search for Messages
    AML    Become a Surrogate (SHARED,MAIL or Other)
           Personal Preferences ...
           Other MailMan Functions ...
           Help (User/Group Info., etc.) ...

Select MailMan Menu Option: RML  Read/Manage Messages

Select message reader: Classic//
Read mail in basket: IN//          (82 messages)
Last message number: 86   Messages in basket: 82

IN Basket Message: 1// 86

Subj: LR*5.2*405  [#10165157] 10 Nov 2010 10:21:23 -0400 (EDT)
9794 lines
From: <"NPM  [#53176987]"@FORUM.VA.GOV> In 'IN' basket.   Page 1
-----
$TXT Created by HOWDYDEVELOPER,ONE at TEST.BECKLEY.MED.VA.GOV (KIDS) on Tuesday,
11/09/10 at 19:25
=====
Run Date: NOV 10, 2010                      Designation: LR*5.2*405
Package : LR - LAB SERVICE                   Priority: Mandatory
Version : 5.2                               Status: Verified
=====

Subject: HOWDY COMPUTERIZED PHLEBOTOMY LOGIN PROCESS

Category:
- Enhancement (Mandatory)
- Data Dictionary
- Routine
- Other

Description:
Enter message action (in IN basket): Ignore// Xtract KIDS
Select PackMan function: ?
    Answer with PackMan function NUMBER, or NAME
Choose from:
1          ROUTINE LOAD
2          GLOBAL LOAD
3          PACKAGE LOAD
4          SUMMARIZE MESSAGE
5          PRINT MESSAGE
6          INSTALL/CHECK MESSAGE
7          INSTALL SELECTED ROUTINE(S)
```



```

8          TEXT PRINT/DISPLAY
9          COMPARE MESSAGE

Select PackMan function: 6  INSTALL/CHECK MESSAGE

Line 373  Message #10165157  Unloading KIDS Distribution   LR*5.2*405
Want to Continue with Load? YES//
Loading Distribution...

      LR*5.2*405

Select PackMan function: ^

```

## Example Verify Checksums in Transport Global

```

Example Verify Checksums in Transport Global Procedure:

1      Load a Distribution
2      Verify Checksums in Transport Global
3      Print Transport Global
4      Compare Transport Global to Current System
5      Backup a Transport Global
6      Install Package(s)
      Restart Install of Package(s)
      Unload a Distribution

Select INSTALL NAME:      LR*5.2*405      Loaded from Distribution  11/12/10@12:56:37
=> LR*5.2*405

This Distribution was loaded on Nov 12, 2010@12:56:37 with header of
LR*5.2*405
It consisted of the following Install(s):
LR*5.2*405

Want each Routine Listed with Checksums: Yes//      YES
DEVICE: HOME//

PACKAGE: LR*5.2*405      Sep 23, 2011
-----

```

The checksums below are new checksums, and can be checked with CHECK1^XTSUMBLD.

LRHY0	Value	B3945989
LRHY01	Value	B42068305
LRHY22	Value	B4209641
LRHY4X	Value	B60499659
LRHYA	Value	B29476770
LRHYAFT	Value	B93475288
LRHYB	Value	B41480183
LRHYBC1	Value	B65673282
LRHYBC9	Value	B188141
LRHYBL1	Value	B187896
LRHYBLD	Value	B5635430
LRHYDEL	Value	B58771394
LRHYED	Value	B54493
LRHYF1	Value	B21719177
LRHYF2	Value	B1996292
LRHYF4	Value	B53704668
LRHYLRX	Value	B1258345
LRHYLS1	Value	B9947241
LRHYPH0	Value	B38997897
LRHYPH2	Value	B12074115
LRHYPL	Value	B9505821
LRHYPOST	Value	B856379
LRHYT1	Value	B12777188
LRHYT2	Value	B3165610
LRHYU	Value	B3762458
LRHYU4	Value	B116774
LRHYU5	Value	B83020
LRHYUTL	Value	B160482

28 Routines checked, 0 failed.

## Example Print Transport Global

```
Select Programmer Options Option: KIDS  Kernel Installation & Distribution System

      Edits and Distribution ...
      Utilities ...
```

Installation ...  
Patch Monitor Main Menu ...

Select Kernel Installation & Distribution System Option: installation

- 1 Load a Distribution
- 2 Verify Checksums in Transport Global
- 3 Print Transport Global
- 4 Compare Transport Global to Current System
- 5 Backup a Transport Global
- 6 Install Package(s)  
Restart Install of Package(s)  
Unload a Distribution

Select Installation Option: 3 Print Transport Global  
Select INSTALL NAME: LR\*5.2\*405 9/23/11@17:22:40  
=> LR\*5.2\*405

This Distribution was loaded on Sep 23, 2011@17:22:40 with header of  
LR\*5.2\*405

It consisted of the following Install(s):  
LR\*5.2\*405

Select one of the following:

- 1 Print Summary
- 2 Print Summary and Routines
- 3 Print Routines

What to Print: 1 Print Summary

DEVICE: HOME// ;:99999 TELNET TERMINAL

PACKAGE: LR\*5.2\*405 Sep 23, 2011 5:24 pm

PAGE 1

-----  
TYPE: SINGLE PACKAGE

TRACK NATIONALLY: YES

NATIONAL PACKAGE: LAB SERVICE

ALPHA/BETA TESTING: NO

DESCRIPTION:

ENVIRONMENT CHECK:

DELETE ENV ROUTINE:

PRE-INIT ROUTINE:

DELETE PRE-INIT ROUTINE: No

POST-INIT ROUTINE: LRHYPOST

DELETE POST-INIT ROUTINE: No

PRE-TRANSPORT RTN:

FILE #	FILE NAME	UP DATE DD	SEND SEC. CODE	DATA COMES W/FILE	SITE DATA	RSLV PTRS	USER OVER RIDE
--------	-----------	------------------	----------------------	-------------------------	--------------	--------------	----------------------

69.86	HOWDY SITE FILE	YES	YES	NO			
-------	-----------------	-----	-----	----	--	--	--

69.87	HOWDY SPECIMEN TIMES BY UID	YES	YES	NO			
-------	-----------------------------	-----	-----	----	--	--	--

ROUTINE:

ACTION:

LRHY0	SEND TO SITE
LRHY01	SEND TO SITE
LRHY22	SEND TO SITE
LRHY4X	SEND TO SITE
LRHYA	SEND TO SITE

LRHYAFT	SEND TO SITE
LRHYB	SEND TO SITE
LRHYBC1	SEND TO SITE
LRHYBC9	SEND TO SITE
LRHYBL1	SEND TO SITE
LRHYBLD	SEND TO SITE
LRHYDEL	SEND TO SITE
LRHYED	SEND TO SITE
LRHYF1	SEND TO SITE
LRHYF2	SEND TO SITE
LRHYF4	SEND TO SITE
LRHYLRX	SEND TO SITE
LRHYLS1	SEND TO SITE
LRHYPH0	SEND TO SITE
LRHYPH2	SEND TO SITE
LRHYPL	SEND TO SITE
LRHYPOST	SEND TO SITE
LRHYT1	SEND TO SITE
LRHYT2	SEND TO SITE
LRHYU	SEND TO SITE
LRHYU4	SEND TO SITE
LRHYU5	SEND TO SITE
LRHYUTL	SEND TO SITE
OPTION:	ACTION:
LRHY HOWDY BOT	SEND TO SITE
LRHY HOWDY MAIN MENU	SEND TO SITE
LRHY HOWDY PPOC MAIN MENU	SEND TO SITE
LRHY PATIENT CARD SCAN	SEND TO SITE
LRHY PATIENT CARD SCAN (PPOC)	SEND TO SITE
LRHY PATIENT WAIT TIME	SEND TO SITE
LRHY PHLEBOTOMY LOG	SEND TO SITE
LRHY PPOC LABEL PRINT	SEND TO SITE
LRHY SCAN SPECIMENS INTO LAB	SEND TO SITE
LRHY SITE FILE EDIT	SEND TO SITE
LRHY TRACK COLLECTION	SEND TO SITE
SECURITY KEY:	ACTION:
LRHYKEY	SEND TO SITE
INCLUDE NAMESPACE:	EXCLUDE NAMESPACE:
LR	

## Example Installation Package from Distribution

Select Programmer Options Option: KIDS Kernel Installation & Distribution System

Edits and Distribution ...  
Utilities ...  
Installation ...  
Patch Monitor Main Menu ...

Select Kernel Installation & Distribution System Option: INStallation

- 1 Load a Distribution
- 2 Verify Checksums in Transport Global

```

3      Print Transport Global
4      Compare Transport Global to Current System
5      Backup a Transport Global
6      Install Package(s)
7      Calculate and Show Checksum Values
      Restart Install of Package(s)
      Unload a Distribution

Select Installation Option: 6  Install Package(s)
Select INSTALL NAME:      LR*5.2*405      9/23/11@17:22:40
      => LR*5.2*405

This Distribution was loaded on Sep 23, 2011@17:22:40 with header of
      LR*5.2*405
      It consisted of the following Install(s):
      LR*5.2*405
Checking Install for Package LR*5.2*405

Install Questions for LR*5.2*405

Incoming Files:

      69.86      HOWDY SITE FILE
Note:  You already have the 'HOWDY SITE FILE' File.

      69.87      HOWDY SPECIMEN TIMES BY UID
Note:  You already have the 'HOWDY SPECIMEN TIMES BY UID' File.

Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//

Want KIDS to INHIBIT LOGONS during the install? NO//
Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//

Enter the Device you want to print the Install messages.
You can queue the install by enter a 'Q' at the device prompt.
Enter a '^' to abort the install.

DEVICE: HOME//      TELNET TERMINAL
-----

      Install Started for LR*5.2*405 :
              Sep 23, 2011@17:27:52

Build Distribution Date: Sep 23, 2011

      Installing Routines:
              Sep 23, 2011@17:27:52

      Installing Data Dictionaries:
              Sep 23, 2011@17:27:53

      Installing PACKAGE COMPONENTS:

      Installing SECURITY KEY

```

Installing OPTION

Sep 23, 2011@17:27:53

Running Post-Install Routine: ^LRHYPOST

Sending install completion alert to mail group G.LMI

Updating Routine file...

Updating KIDS files...

LR\*5.2\*405 Installed.

Sep 23, 2011@17:27:53

Not a production UCI

```
-----
      +-----+
100%  |                25                50                75                |
Complete +-----+
```

Install Completed

# Post-installation Considerations

The site's key phlebotomy lab personnel should determine which implementation of Howdy is appropriate for their outpatient phlebotomy lab.

## VA FileMan Browser

In order for you to view reports using the features of the VA FileMan Browser, the browser must be defined in the DEVICE file (#3.5) according to instructions in the Kernel Systems Manual V. 8.0 and VA FileMan V. 21.0 manuals. In addition, you should have the terminal type set to C-VT320 or greater.

## Setting up the Howdy Hardware

The hardware you need for Howdy depends on the menu you will use at your site. Sites can use current equipment for Howdy.

**Note:** All devices (label printers and bingo board) must be in the DEVICE FILE (#3.5).

## Howdy Traditional

- Magnetic strip reader that can read the magnetic strip or bar code scanner that can scan the bar code on the VIC
- PC or thin client with monitor and optional keyboard
- Label Printer, a bar code label printer is required. (Zebra and Intermec printers were used at test sites for the bar-coded lab test labels.)
- Bar Code Scanner (optional)

## Howdy Print at Point of Collection (PPOC)

- Magnetic strip reader that can read the magnetic strip or bar code scanner that can scan the bar code on the VIC
- PC or thin client with monitor and optional keyboard
- Public display board known as a bingo board

**Note:** The bingo board process was validated using a printer to verify functionality. Using a display monitor for the bingo board functionality was not tested, but may be included in a future release.

- Multiple PCs, each with a monitor, keyboard, scanner, and a bar code label printer

**Note:** Multi-divisional sites will require the same equipment as the parent site if they intend to use the Howdy software.

For sites using the Howdy PPOC menu, the IRMs can set up a device to use as the bingo board. The entry in this field must exist in the DEVICE file (#3.5) and can be a monitor (CRT), printer, or any output device.

**Note:** When setting up a device with the sub-type C-VT consult the manual that came with the equipment.

#### 1. Set up Lab Label

The printers selected in the HOWDY SITE file (#69.86), Printers field (#10) should contain entries from the LABORATORY SITE file (#69.9), Label Device field (#360).

- The *Laboratory Planning and Implementation Guide* (available in the Clinical Section, Laboratory applications, **VistA Document Library**), contains information related to Lab Label set up.
- Label types are defined in the LABORATORY SITE file (#69.9), Label Device field (#360). This field is used by Laboratory software to identify which devices are label printers and to handle various types of label printers and label stock.
- Support and detailed information for lab label printers are defined in patches LR\*5.2\*161 and LR\*5.2\*218.

#### Device File (#3.5) sample entry

```
NAME: HOWDY1 BAR CODE PTR
$I: NLA0:
ASK PARAMETERS: NO
SIGN-ON/SYSTEM DEVICE: NO
LOCATION OF TERMINAL: PHLEBOTMY ROOM
LOCAL SYNONYM: BACKUP HOWDY
ASK HFS I/O OPERATION: NO
OPEN COUNT: 34782
MARGIN WIDTH: 132
BARCODE AVAIL: YES
MNEMONIC: 284
SUBTYPE: P-TCP-ZEBRA-PROSTHETIC
PRINT SERVER NAME OR ADDRESS: [IP address]
TELNET PORT: 9100
EQUINOX BOX (c): NLA0
ASK DEVICE: NO
TASKMAN PRINT A HEADER PAGE: NO
QUEUEING: NOT ALLOWED
IP ADDRESS: [IP address]
ASK HOST FILE: NO
SUPPRESS FORM FEED AT CLOSE: YES
OUT-OF-SERVICE DATE:
PAGE LENGTH: 64
TYPE: HOST FILE SERVER
PERFORM DEVICE CHECKING: NO
```

#### 2. Connect the card reader

Installation of the hardware device that reads the information encoded in the magnetic stripe through a serial port, USB connection, or keyboard wedge is vendor-specific and not within the purview of this document. Consult the documentation that comes with the device.

#### 3. Assign Security Key

The IRM must assign the LRHYKEY security key to the personnel who configure and maintain the HOWDY SITE file (#69.86) at each location.

#### 4. Configure Howdy Site File

Edit the Howdy Site File according to local laboratory business rules. Refer to the **Configuring the Howdy Site File** section.

**Note 1:** If the database is multi-divisional (multiple medical centers and/or Community-based Outpatient Clinic (CBOC)), configure a Howdy Site File entry for each division.



**Note 2:** If Howdy was previously installed as Class 3 software, your Howdy site file will not merge with the new Class 1 software. Your site will need to repopulate the new Howdy site file with your site-specific parameters.

The post-install routine adds the HOWDY,BOT user to the NEW PERSON file (#200).

- If the site does not have a system Howdy user, sites may use the Howdy Bot to populate the Howdy Bot field (#56) of the HOWDY SITE file (#69.86).
- When entered in this field, HOWDY,BOT is the user assigned to the logged event when a patient VIC is scanned.
- This user has very limited access to the system and is allowed to enter patient identification information only.

5. **Assign Howdy Main Menu**

The IRM should assign [HOWDY MAIN MENU] or [HOWDY PPOC MAIN MENU] to the appropriate lab staff for each Howdy user, depending on the menu the site intends to implement.

6. **Set up the Howdy Patient Login Workstation**

After logging into the patient login workstation, run the [LRHY PATIENT CARD SCAN] or [LRHY PATIENT CARD SCAN (PPOC)] menu option.

Both menu options set up the patient login workstation as a thin client. The use of a thin client allows increased security for patient interaction. Access is limited to the VistA Howdy LRHY PATIENT CARD SCAN menu option only.

## Configuring the Howdy Site File [LRHY SITE FILE EDIT]

Only personnel with the LRHYKEY security key assigned by the IRM, ADPAC or LIM who installed the Howdy software, can view the EDIT HOWDY SITE FILE menu option.

You set up the site file by populating fields in the HOWDY SITE file (#69.86), as these fields contain information that affects how the application is used at your site.

**Note:** The fields are in the order in which they display on the screen for editing.

Field #	Field	Description
.01	Name	This field is the name of the outpatient phlebotomy site. Example: Poplar Bluff VA Medical Center or WG Bill Hefner VA Medical Center This is a free-text field, which accepts 3 to 30 characters, not numeric or starting with punctuation.
2	Lab Test (to Exclude)	This field allows you to <b>exclude</b> laboratory tests from outpatient phlebotomy collection by entering the test at the Lab Test prompt (multiple lab tests allowed). If you do not want certain tests to be accessioned by Howdy, list those tests in the Lab Test to Exclude field. This field works in conjunction with the Order Label field. You can choose to have order labels print for these tests, so you are aware of the order. Examples: 1. Lab provides containers for 24 hr urine collections that will be submitted on a future date; these should not be accessioned, but should provide an order label.

Field #	Field	Description
		<p>2. Occult blood cards that are only submitted by mail (no order labels necessary).</p> <p>3. Ova and parasite; exclude if laboratory staff are not responsible for collection; designate an order label if responsible for providing the collection container.</p> <p>This field is a pointer to the LABORATORY TEST file (#60).</p>
4	Collection Sample (to Exclude)	<p>This field allows you to <b>exclude</b> a collection sample from outpatient phlebotomy collection by entering the collection sample name at this prompt (multiple collection samples allowed).</p> <p>Examples:</p> <ol style="list-style-type: none"> <li>1. 24 hr urine</li> <li>2. Sputum</li> <li>3. CSF – cerebrospinal fluid</li> <li>4. Peritoneal fluid</li> </ol> <p>This field is a pointer to the COLLECTION SAMPLE file (#62).</p>
6	Site Specimen (to Exclude)	<p>This field allows you to <b>exclude</b> site specimens from outpatient phlebotomy collection by entering the name of the specimen at this prompt (multiple site specimens allowed).</p> <p>Also, ensure that the collection sample is defined for the site specimen to exclude.</p> <p>Example:</p> <p>If you want to exclude gray top collection samples, enter blood under Site Specimen and gray top in the Collection Sample field.</p> <p>This field is a pointer to the TOPOGRAPHY FIELD file (#61).</p>
8	Collection Types (to Exclude)	<p>This field allows you to <b>exclude</b> collection types from outpatient phlebotomy collection (multiple collection types allowed).</p> <p>This field is a set of codes from which to select.</p> <p>'LC' FOR LAB COLLECT  'WC' FOR WARD COLLECT  'SP' FOR SEND PATIENT  'I' FOR IMMEDIATE COLLECT</p> <p>Howdy is used primarily for outpatient collection; therefore, LC is usually excluded.</p>
10	Label Printers	<p>This field allows you to list label printers that Howdy uses at your facility by entering the label printers at this prompt (multiple printers allowed).</p>
11	Order Label Routine	<p>The label routine that is currently in file (#69.9) of the lab package at your site is used for your default order label routine. You can choose to use a custom order label routine by entering that routine in this field.</p> <p>The answer must be 2-8 characters in length.</p>

Field #	Field	Description
16	Exclude Clinics (Except for today)	<p>Certain specialty clinics require the collection date of ordered tests to coincide with the clinic visit date. This field allows you to <b>exclude</b> the accessioning of orders from those specialty clinics unless the collection date is for <b>Today</b> (multiple clinics allowed). Examples:</p> <ol style="list-style-type: none"> <li>1. CBC for hematology/oncology clinic</li> <li>2. PT/INR from anticoagulation clinic</li> </ol> <p>This field is a pointer to the HOSPITAL LOCATION file (#44).</p> <p><b>Note:</b> If an order for the <i>excluded</i> clinic is for <b>today</b>, the order will accession. If an order for the <i>excluded</i> clinic is for <b>tomorrow</b>, and you run the program, the order will be ignored.</p>
18	Check for Future Orders (Days)	<p>This field allows you to set Howdy to accession orders automatically for future dates by entering the number of days to look ahead. This is determined by your current local business rules.</p> <ul style="list-style-type: none"> <li>• Select the number of days to look ahead to coincide with your current local practice.</li> <li>• Use a timeframe that will exclude orders from a future clinic visit.</li> </ul> <p>Example Patients may have weekly visits for anticoagulation therapy, so optimum future days would be 6 days.</p>
20	Check for Past Orders (Days)	<p>This field allows you to set Howdy to accession orders automatically for past dates by entering the number of days to look back. This should be determined by your current local business rules.</p> <ul style="list-style-type: none"> <li>• Select the number of days to look back to coincide with your current local practice.</li> <li>• Because sites strive for clinic visits to occur within 30 days of the expected return date as requested by the provider, the optimum number of days in the past to check for orders is 31.</li> <li>• If there are only orders older than this range, patient is directed to <i>See the clerk</i> for further evaluation of orders.</li> </ul> <p><b>Note:</b> Both the future days and past days fields should be evaluated for optimum range.</p>
25	Order Label Tests	<p>There are occasions when an outpatient phlebotomy clerk is alerted about ordered tests, but does not want to accession the test(s) at the time. Use this field in conjunction with the Exclude Lab Tests field to print order labels but not accession them at this time. Example For a 24-hour urine test, the clerk may prepare a labeled</p>

Field #	Field	Description
		<p>container to give to the patient, but not accession the order until the patient returns with the specimen.</p> <p>Enter these tests in the Order Label Tests field, which is a pointer to the LABORATORY TEST file (#60) (multiple entries allowed).</p>
30	Exclude Urgency	<p><b>Use this field with caution</b></p> <p>If during the ordering process, test(s) are assigned an urgency listed in the Exclude Urgency field, those test(s) will not be accessioned. This multiple-entry field tells Howdy to exclude specific urgency entries and is a pointer to the URGENCY file (#62.05).</p> <p>Example</p> <p>Excluded Urgency = <b>STAT</b>; if all tests on an order are assigned the excluded urgency, Howdy will not accession the order. If an order has mixed urgencies, Howdy broadcasts the message, <i>See the clerk</i> and laboratory staff will evaluate for appropriate action.</p>
32	Greeting	<p>This word-processing field allows you to display the site's welcome greeting to the patient scanning the VIC or typing the SSN upon entering the outpatient phlebotomy lab area.</p> <p>Example:</p> <p><i>HELLO, There is a request for you today, please have a seat and someone will be with you shortly.</i></p>
40	Welcome to	<p>This field is the welcome greeting to the patient.</p> <p>Example:</p> <p><i>The WG Bill Hefner VA Medical Center</i></p> <p>The answer must be 1-40 characters in length.</p>
42	Your Host is	<p>This field is the name of the host at the site, usually the name of the laboratory director.</p> <p>Example:</p> <p><i>Dr. John Doe, M.D</i></p> <p>The answer must be 1-40 characters in length.</p>
44	Host Title	<p>This field is the title of the host at the site.</p> <p>Example:</p> <p><i>Chief Pathologist, Laboratory Service</i></p> <p>The answer must be 1-40 characters in length.</p>
45	Spacer Label Printer	<p>This field allows you to select a printer from the DEVICE file (#3.5) (multiple printers allowed) that produces a blank label between orders. If there is only one order for each patient in sequence, the spacer label will print between each one.</p> <p><b>Note:</b> Multiple orders on the same patient will print a spacer label between those orders.</p>

Field #	Field	Description
52	Delete Same Day Duplicates	<p>This field allows you to activate the automatic deletion of duplicate lab tests if the collection date equals the current date (<b>today</b>) by entering <b>Yes</b>. If the collection date is different from the current date, all tests are accessioned and duplicates must be handled according to local procedures.</p> <p>Because lab tests cannot be deleted, the lab test is automatically set to <b>Discontinued</b> with the comment of <b>Duplicate: *NP Reason: Duplicate *NP</b>.</p> <p><b>Note:</b> The alert for the results of these duplicate tests will only go to the provider of the active tests, not the provider of the discontinued tests.</p>
54	Bingo Board Device	<p>This field contains the device on which patient names display when using the Print at Point of Collection (PPOC) menu of Howdy. The entry in this field points to the DEVICE file (#3.5) and can be a monitor (CRT), printer, or any output device.</p> <p>When setting up a dedicated public display device, such as the bingo board, only devices defined in the DEVICE FILE (#3.5) with the sub-type C-VT should be entered in the Bingo Board Device field.</p> <p>To install the hardware, follow the instructions provided with the equipment.</p> <p><b>Note:</b> The bingo board process was validated using a printer to verify functionality. Using a display monitor for the bingo board functionality was not tested, but may be included in a future release.</p>
56	Howdy Bot	<p>The post-install routine automatically adds the HOWDY,BOT as a cyber (non-human) proxy user to the NEW PERSON file (#200).</p> <p>HOWDY,BOT is used to populate the Howdy Bot field (#56) of the HOWDY SITE file (#69.86).</p> <p>HOWDY,BOT is the user assigned to the logged event when a patient VIC is scanned.</p>

# Running Howdy Software

After successful installation of this patch, the following new menu options accommodate the Howdy functionality and can be validated.

## Howdy Main Menu (Traditional)

Menu Option	Description
<b>SCAN PATIENT CARD</b>	This menu option initiates the Howdy process using the greeting from the Howdy Site File and prints labels.
<b>PHLEBOTOMY LOG</b>	This menu option tracks the collector's phlebotomy performance times.
<b>SCAN SPECIMENS INTO LAB</b>	This menu option allows the receiver to scan collected specimen labels to capture Lab Receipt Time.
<b>TRACK COLLECTION</b>	This menu option displays patient specimen collection demographics.
<b>PATIENT WAIT TIME</b>	This menu option displays how long a patient waits to have a sample drawn.
<b>EDIT HOWDY SITE FILE</b>	This menu option enables the LRHYKEY security keyholder to edit the HOWDY SITE file (#69.86).

## Howdy PPOC Main Menu

Menu Option	Description
<b>SCAN PATIENT CARD (PPOC)</b>	This menu option confirms the patient, displays accessioned tests, and allows the collector to select test(s) actually collected.
<b>PRINT PPOC LABEL</b>	<p>This menu option allows the collector to verify Patient Identification at time of collection.</p> <p><b>Note:</b> Each collecting station must have a dedicated PC, scanner, and bar code label printer.</p> <p>Howdy recognizes the person as the collector and the date and time of collection.</p> <ol style="list-style-type: none"><li>1. The collector scans the patient's VIC (Veteran's Identification Card) or armband, or the patient can type the SSN on the keyboard. The patient's demographics display with the current accessioned orders.</li><li>2. The collector verifies Patient Identification. The labels print.</li><li>3. Specimens are labeled accordingly.</li></ol>
<b>SCAN SPECIMENS INTO LAB</b>	This menu option allows the receiver to scan collected specimen labels to capture Lab Receipt Time.
<b>TRACK COLLECTION</b>	This menu option displays patient specimen collection demographics.

<b>Menu Option</b>	<b>Description</b>
<b>PATIENT WAIT TIME</b>	This menu option displays how long a patient waits to have a sample drawn.
<b>EDIT HOWDY SITE FILE</b>	This menu option enables the LRHYKEY security keyholder to edit the HOWDY SITE file (#69.86).

## Backout/Uninstall Procedures

There is a backout strategy. Delete the menu options and then the routines. Contact the OIFO for guidance.

**Note:** This is a mandatory patch; so LRHY\* has to remain in the system.  
Place options Out of Order locally, as a way to disable the application.

# Troubleshooting

## Printers

Problem	Solution
1. <b>Accession labels do not print</b>	No orders for patient Multiple orders No printer assigned at sign on Printer not connected to network Card scanner not connected Incompatible printer in use
2. <b>Order labels do not print</b>	Entry in Howdy Site File is not defined Wrong printer routine defined in Howdy Site File Check solutions described in problem 1 Check order label field in Howdy Site File.
3. <b>Label type printing incorrectly</b>	Entries in the Howdy Site File (#69.86), Printers (#10) field should also exist in the LABORATORY SITE file (#69.9), Label Device field (#360). <ul style="list-style-type: none"><li>• This field is a pointer to the DEVICE file (#3.5).</li><li>• Specific information and support pertaining to Lab Label printer configurations are detailed in the Lab patch descriptions: LR*5.2*161 and LR*5.2*218.</li></ul>
4. <b>Specimen labels do not print</b>	<ul style="list-style-type: none"><li>• No orders for patient</li><li>• Check that the date range agrees with the order date</li><li>• Check for exclusions in the Howdy Site File<ul style="list-style-type: none"><li>a. Test exclusion</li><li>b. Status exclusion</li><li>c. Location exclusion</li></ul></li><li>• Check that the printer name is correct in the device file</li></ul>

**Note:** If you have any questions concerning the implementation of this application, contact the VA Service Desk at 1-888-596-4357 or directly log a Remedy ticket via Remedy Requester application using the Category-Applications-Vista, Type-Lab 5.2, Item-Howdy.



# Frequently Asked Questions (FAQs)

1. **What equipment is required with Howdy?**

Using the Howdy Main Menu

- Dedicated PC with an attached scanner
- Optional keyboard for patient check-in
- Shared barcode label printer
- Shared PC with scanner for phlebotomy staff

Using the Howdy PPOC Main Menu

- Dedicated PC with an attached scanner
- Optional keyboard for patient check-in
- Barcode label printer per phlebotomy station
- Display (Bingo) board

2. **With Howdy, what type of scanners do I use?**

It does not matter, as long as the scanner is a magnetic or a bar code scanner; either will work with the patient's VIC.

3. **Does Howdy require someone to *man the station* at the receiving desk?**

No, as long as there is someone available to address issues.

It is better not to have someone at the receiving desk; patients want the personnel to scan for them. Without someone at the receiving desk, the patient will read signage and automatically scan the VIC without assistance.

4. **Why have signage?**

Signage is an important piece for Howdy--to be most efficient.

Using Howdy, the check-in process does not require the assistance of a staff member for over 80% of the patients; the patient does need instruction on what to do. Once patients are familiar with this process, they like to assist new patients.

5. **What is the advantage of having a keyboard available with a dedicated Howdy PC?**

When a patient cannot use the VIC, (do not have it or it is damaged), the patient can type the SSN on the keyboard, which serves the same purpose as scanning the VIC. This eliminates the need for a staff member to assist and saves time.

6. **Does the Bingo Board have to be a wall-mounted screen?**

No, you can use a computer screen, as long as it is visible to the phlebotomy staff.

**Note:** The bingo board process was validated using a printer to verify functionality. Using a display monitor for the bingo board functionality was not tested, but may be included in a future release.

7. **Should there be laboratory policies pertaining to Howdy?**

Yes

Once you determine how Howdy works best for your site, you develop your policies accordingly. Be sure to communicate this to your providers and scheduling staff, so the ordering practices match. This makes the flow of patients through the phlebotomy check-in process much smoother.

8. **What is the optimum date range for Howdy to find orders?**

Optimum date range is up to the individual site.

- If you set the range short, you get too many **no orders found**.
- If you set the range wide, you get too many **multiple orders**.

We have found that **+7 days and back 31 days** works well for a majority of sites.

9. **Does Howdy change laboratory *turnaround time* (TAT) in VistA?**

No

Howdy retrieves information only from VistA. Generating reports from Howdy is a standalone tool to help you with your laboratory practices. TAT in the Laboratory package is still accession time to verification time.

# Attention Site ISOs and Privacy Officers

## Update Your Existing Site PIA

You must add the following information to the appropriate Minor Application tab of your existing site PIA.

- Tab 10 is for a minor application that gets security controls from VistA.
- Tab 11 is for a standalone minor application.

<b>Name</b>	Howdy
<b>Description</b>	Howdy Computerized Phlebotomy Login Process is an automated laboratory check-in application used in the Veterans Health Information Systems and Technology Architecture (VistA) Laboratory system.
<b>Comments</b>	
<b>Is PII collected by this minor application?</b>	No
<b>Does this minor application store PII?</b>	No
<b>If yes, where?</b>	
<b>Who has access to this data?</b>	

# Optional - Howdy Validation Scripts

## Test Accounts

Site Name\_\_\_\_\_

Person(s) Completing Testing\_\_\_\_\_

	Test Scenarios for Test Account	Date Tested	Comments
<p><b>Note:</b> Test the implementation instructions for site-specific parameters with Howdy accessioning.</p> <ul style="list-style-type: none"><li>• Use patients with no history of orders.</li><li>• Use different patients for each scenario or multiples of that scenario.</li></ul>			
	In a test account, choose tests or profiles to accession and place the order within the timeframe set in your site file. They should all accession and print appropriate accession labels. Repeat two more times using different tests.		
	In a test account, choose one test or profile to accession and one test or profile listed in your order label file and place an order within the timeframe listed in your site file. The first should print an accession label and the other an order label. Repeat two more times using different tests.		
	In a test account, place an order for outside the timeframe to the future. You should be prompted <i>no orders found, please see clerk.</i> Repeat two more times using different tests.		
	In a test account, place an order for outside the timeframe to the past. You should be prompted <i>no orders found, please see clerk.</i> Repeat two more times using different tests.		

	Test Scenarios for Test Account	Date Tested	Comments
	<p>In a test account, place two separate orders for different days inside the timeframe. You should be prompted <i>multiple orders, please see clerk</i>. Repeat two more times using different tests.</p>		
	<p>In a test account, place one order outside the timeframe to the future and one order inside the timeframe. The order outside should be ignored and the order inside should be accessioned. Repeat two more times using different tests.</p>		
	<p>In a test account, place an order for a location in your medical center to-be-excluded. Place one order for today and another order for another day for that excluded location. Howdy should accession the order for today and ignore the other order. Repeat two more times using different locations.</p>		
	<p>In a test account, place an order with a specimen type to-be-excluded. You should be prompted <i>no orders found, please see clerk</i>. Repeat two more times using different specimen types.</p>		
	<p>In a test account, place an order using a collection type to-be-excluded. You should be prompted <i>no orders found, please see clerk</i>. Repeat two more times using different collection types.</p>		
	<p>In a test account, place two orders containing the same test for today. One should be accessioned and the other should be merged and documented as <i>duplicate order</i>. Repeat two more times using different tests.</p>		

	Test Scenarios for Test Account	Date Tested	Comments
	<p>In a test account, place an order for an urgency to-be-excluded.</p> <p>You should be prompted <i>no orders found, please see clerk.</i></p> <p>Repeat two more times using different urgencies</p>		
	<p>In a test account, choose one test or profile to accession and one test or profile is listed in your lab test to-exclude-file, and place the order within the timeframe listed in your site file.</p> <p>The first should be accessioned and print an accession label, the other should be ignored.</p> <p><b>Note:</b> You must have these tests entered in the LAB TEST to Exclude file and the ORDER LABEL TEST file.</p> <p>Repeat two more times using different tests.</p>		
	<p>In a test account, choose a test with a collection sample to exclude. This test may also have a site specimen to exclude.</p> <p>Also, choose a test with a collection sample/site specimen not to exclude and verify that that Howdy only accessions the latter.</p> <p>Repeat two more times using different collection samples.</p>		

**Note:** If your site is a multi-divisional site, repeat validation at each site

## Production Accounts

	Test Scenarios for Production Account (Optional)	Date Tested	Comments
<p><b>Note:</b> Test the implementation instructions for site- specific parameters with Howdy accessioning.</p> <ul style="list-style-type: none"> <li>• Use test patients with no history of orders.</li> <li>• Use different patients for each scenario or multiples of that scenario.</li> </ul>			
	<p>In a production account, choose tests or profiles to accession and place the order within the timeframe set in your site file. They should all accession and print appropriate accession labels</p> <p>Repeat two more times using different tests.</p>		
	<p>In a production account, choose one test or profile to accession and one test or profile listed in your order label file and place an order within the timeframe listed in your site file.</p> <p>The first should print an accession label and the other an order label.</p> <p>Repeat two more times using different tests.</p>		
	<p>In a production account, place an order for outside the timeframe to the future.</p> <p>You should be prompted <i>no orders found, please see clerk.</i></p> <p>Repeat two more times using different tests.</p>		
	<p>In a production account, place an order for outside the timeframe to the past.</p> <p>You should be prompted <i>no orders found, please see clerk.</i></p> <p>Repeat two more times using different tests.</p>		
	<p>In a production account, place two separate orders for different days inside the timeframe.</p> <p>You should be prompted <i>multiple orders, please see clerk.</i></p> <p>Repeat two more times using different tests.</p>		

	<b>Test Scenarios for Production Account (Optional)</b>	<b>Date Tested</b>	<b>Comments</b>
	<p>In a production account, place one order outside the timeframe to the future and one order inside the timeframe.</p> <p>The order outside should be ignored and the order inside should be accessioned.</p> <p>Repeat two more times using different tests.</p>		
	<p>In a production account, place two orders for a location in your medical center to-be-excluded. Place one order for today and another order for another day for that excluded location.</p> <p>Howdy should accession the order for today and ignore the other order.</p> <p>Repeat two more times using different locations.</p>		
	<p>In a production account, place an order with a specimen type to-be-excluded.</p> <p>You should be prompted <i>no orders found, please see clerk.</i></p> <p>Repeat two more times using different specimen types.</p>		
	<p>In a production account, place an order using a collection type to-be-excluded.</p> <p>You should be prompted <i>no orders found, please see clerk.</i></p> <p>Repeat two more times using different collection types.</p>		
	<p>In a production account, place two orders containing the same test for today.</p> <p>One should be accessioned and the other should be merged and documented as <i>duplicate order.</i></p> <p>Repeat two more times using different tests.</p>		
	<p>In a production account, place an order for an urgency to-be-excluded.</p> <p>You should be prompted <i>no orders found, please see clerk.</i></p> <p>Repeat two more times using different urgencies</p>		



	<b>Test Scenarios for Production Account (Optional)</b>	<b>Date Tested</b>	<b>Comments</b>
	<p>In a production account, choose one test or profile to accession and one test or profile listed in your lab test to-exclude-file and place the order within the timeframe listed in your site file.</p> <p>The first should be accessioned and print an accession label and the other should be ignored.</p> <p><b>Note:</b> You must have these tests entered in the LAB TEST to Exclude file and the ORDER LABEL TEST file.</p> <p>Repeat two more times using different tests.</p>		
	<p>In a production account, choose a test with a collection sample to exclude. This test may also have a site specimen to exclude.</p> <p>Also, choose a test with a collection sample/site specimen not to exclude and verify that Howdy only accessions the latter.</p> <p>Repeat two more times using different collection samples.</p>		

**Note:** If your site is a multi-divisional site, repeat validation at each site