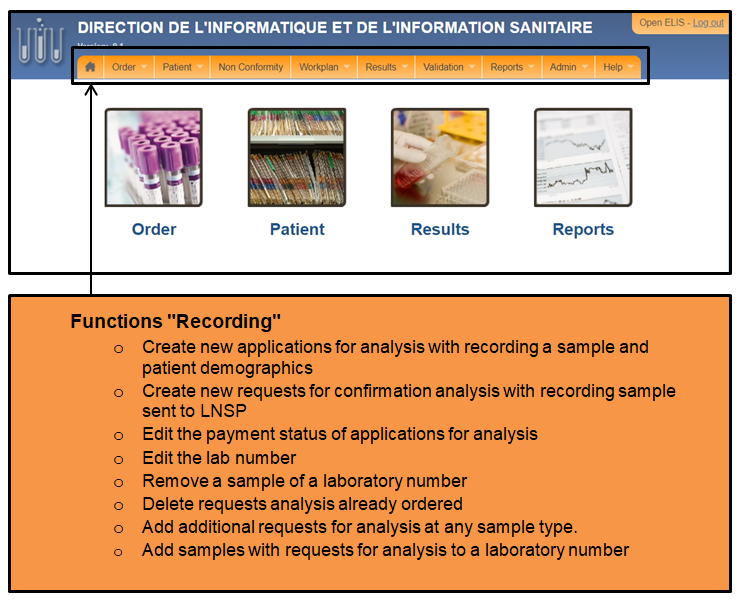
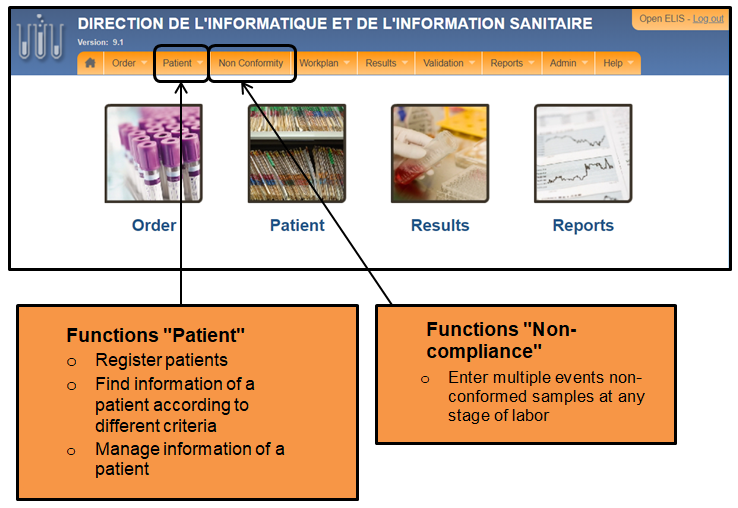
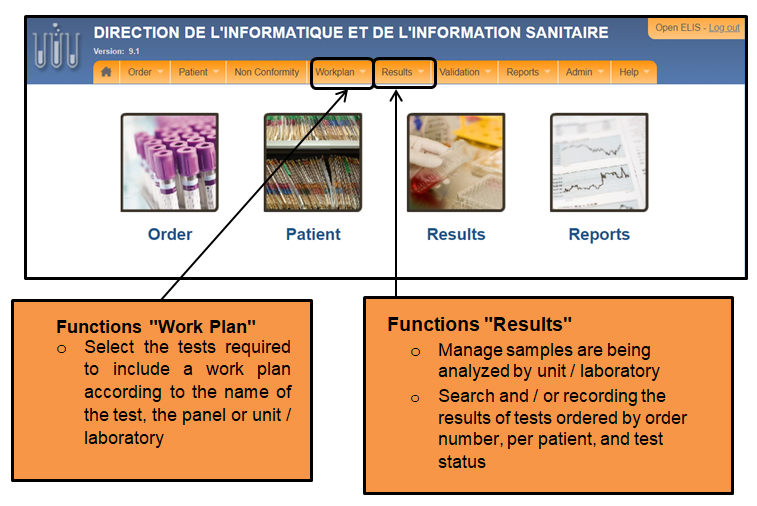
**PART 1: NAVIGATING OpenELIS SYSTEM**

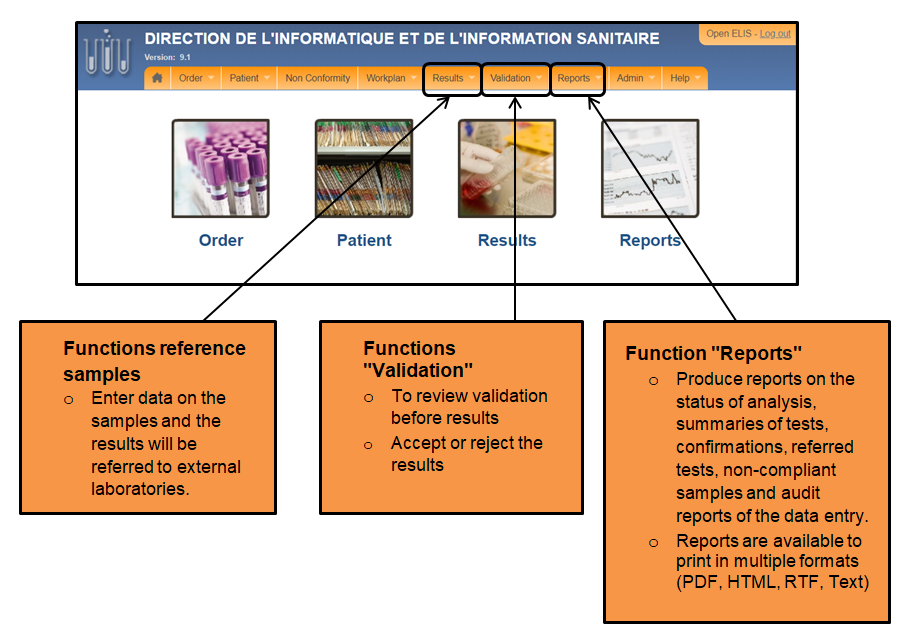
The OpenELIS system includes several modules to help with the collection and reporting of laboratory data. Once you connect to OpenELIS system, the main menu appears with modules that contain major functions OpenELIS system.

Note that the various modules of the system OpenELIS occur in the order of the laboratory workflow. The main menu always remains on the page and you can navigate to other modules to suit your work needs. The functions of the system are organized by OpenELIS module as in the following figures.









**PART 2: SEIZURE OF SAMPLES AND ANALYSIS APPLICATIONS**

This part of the manual has the following checklists:

* How to create analysis requests for the initial evaluation and monitoring report
* How to create applications for confirmatory analysis
* How to change the data on demand analysis, including:
  1. modify the payment status
  2. change request / order
  3. remove a sample associated with the order
  4. remove some required tests
  5. add tests to those already requested
  6. adding a sample to the order

**How to create analysis requests for the initial assessment and monitoring report**

**Task:** Create an analysis request for a sample using the OpenELIS system.

**Goal:** Create an electronic application analysis and capture sample data.

**When:** When a sample has been received for analysis either as part of an initial assessment or monitoring balance

**Who:** Lab Home Staff

**Materials:** Sample analysis application, computer system OpenELIS

**Notes:** This is a form to fill, including fields mandatory and optional fields. Required fields are indicated with a red asterisk \*.

|  |  |
| --- | --- |
|  |  |
|  | |  | | --- | | 1. Hover the mouse over the tab "Order" and click "Add Order" | | 1. Choose initial evaluation or a monitoring report by clicking the appropriate radio button   **Note:** Form filling is almost the same if you click "report initial "or" tracking stock ". Only the step 8 on the sample done different. | | 1. \*Enter the lab number      |  |  | | --- | --- | | **Yes…** | **Therefore…** | | You use a scanner | Use the barcode reader to scan the label. The number is displayed directly in the input field. | | You want to enter  manually number | Type in the numbers input field  component laboratory number | | You want to generate the  number automatically | Click on "Generate". The number is displayed automatically in the input field. | |  | | 1. \*Change the application date and the date of receipt in accordance with the dd/mm/yyyy (day/month/year).     **Note:** These dates are automatically generated by the system. The reception date is the date on which the sample is received at the laboratory.  You can also mention the reception time in the format "hh:mm" (hours: minutes) | | 1. Enter the date of appointment in the format dd/mm /yyyy   (day month Year). | | 1. \*Enter the site name in the field.   The site is the institution (hospital, clinic) that requested the analysis. | | 1. \*Enter the last name and first name of the prescriber demand   (Doctor or nurse who sent the sample IPCI). | | 1. Enter the information contact the prescriber demand :  * Phone number * fax number * E-mail | | 1. Select corresponding status the payment made by the patient:  * paid in full * partially paid * not paid | | 1. Select the dropdown list the option corresponding to the place where code the sample will be analyzed. | | 1. \*Click on the button  next to "Sample" to open the section relating to the sample. | | 1. \*Select the type of sample from the choices in the dropdown list.     This triggers the appearance of a table.    Specify the “Condition” of the sample by clicking on the relevant option from the choices in the drop down list.    You can select more. Select each "state" separately.    If you choose an error condition, click the "X" next to the state. | | 1. Put the date and time of collection in accordance with the date and the current sample collection time.     **Note:** OpenELIS fills the date and time of collection automatically with the entry date. It is not always the case that the date and time of entry are the same as the date and time of collection. | | 1. Enter the name of the test “Collector”. | | 1. \*You must indicate for each sample tests to run. To enter the tests to run, navigate to the parties "Panels" and "Tests Available" and follow the following steps.      |  |  | | --- | --- | | **If you want to** | **Go To** | | Add the tests by panel | Step 17 | | Add individual tests | Step 18 | | | 1. Check the box(es) corresponding to panel(s):     **Note:** The number of panels and tests available for a sample depends on the nature of the sample (serum, plasma, blood, urine).  Panels are a set of analyzes that will be automatically selected in "Tests Available" if you select the desired panel.  **Note:** It is possible to choose several panels and tests for each sample and, if you choose a panel, you can always remove or add specific tests.  The test panels selected and are automatically displayed in the "Tests" column. | | |  |  | | --- | --- | | **Yes...** | **Go To...** | | |  | | --- | | You have several samples | | for same laboratory number | | for which you have to seek | | analysis | | Step 12 | | |  | | --- | | You have a sample of | | same laboratory number | | Step 17 | | |  | | --- | | Want to remove tests | | assigned to a sample | | Step 19 | | |  | | --- | | You assigned all | | requests for analyzes | | necessary for a sample | | Step 20 | | | 1. To delete the selected tests, click the "Delete" link to the right of the corresponding sample.     Clicking "Delete All" will delete ALL the tests listed for all samples of the lab number.    Return to Step 17 to add more panels and other testing sample. | | 1. \*Open the section for the patient by clicking the button.      |  |  | | --- | --- | | This opens two sections: “Search" and "Patient Information” | | |  |  | | | |  |  | | --- | --- | | **If...** | **Consult** | | |  | | --- | | You want to check if the database | | OpenELIS contains patient records | | “How to search a  patient file” | | You cannot find the patient’s record in the OpenELIS database, you will have to create a new patient’s record in the system | “How to create a new patient record” | | | 1. **Note:** Once you have found the patient in the database, or that you have entered the information to create a new patient file, the "Save" button becomes active.  |  |  |  | | --- | --- | --- | | If the “Save” button | Becomes active | Click “Save” | | Does not become active | Ensure all the fields on the page are correctly filled |  |  |  |  | | --- | --- | --- | | A new page appears with a confirmation that the request was | | | | registered in the system. |  |  | | | 1. If you have other requests for analysis at request, return to step 3. | |
|  |  |

**How to create requests for confirmatory testing (sample referred to IPCI by another laboratory)**

**Task:** Apply for confirmatory analysis for a sample (sample referred to IPCI by another laboratory) using the OpenELIS system.

**Goal:** Use OpenELIS system to record the request for confirmatory analysis and capture the data of these confirmation samples.

**When:** When other laboratories send the request to do confirmatory testing.

**Who:** Laboratory Reception Staff.

**Materials:** Sample, the form for summarizing the tests already carried out and the results, analysis application, computer system OpenELIS

**Notes:** This is a form to fill, including fields mandatory and optional fields. Required fields are indicated with a red asterisk \*.

|  |
| --- |
| 1. Hover the mouse over Order tab, select Study and then Initial Entry from the menu. |
| 1. New page will appear. Select the form from the dropdown list. |
| 1. \*A new page will appear according to the selected form. Select Center Name from the dropdown list.     Center Code will automatically appear in the text field according to the selected center name. |
| 1. Enter the name of the doctor. |
| 1. \*Enter received date in the format dd/mm/yyyy and the time you received in the format HH:mm |
| 1. \*Enter the taken date and time in the formats dd/mm/yyyy and HH:mm respectively. |
| 1. \*Enter Subject Number of patient and the site. |
| 1. \*Enter lab number. |
| 1. \*Select patient’s gender from the dropdown list. |
| 1. \*Enter date of birth of patient in the format dd/mm/yyyy. Age will automatically be calculated. |
| 1. Specimens collected, dry tube tests, EDTA tests, and other tests will be shown and checked according to the analysis request form. You can check or uncheck any of the tests. |
| 1. If the sample is under investigation, select “yes” otherwise “no”. |
| 1. Enter any comments in the Note text field. |
| 1. Click Save button if you want to save all the information. You can click “Cancel” button if you do not want to save. |

**How to view Sample**

|  |
| --- |
| 1. Hover the mouse over Order tab, select Study and click View. |
| 1. New page will appear. You can search the patient information by:  * First name * Last name * Patient Identification Code * Lab No |
| 1. Select one of the options and enter the information accordingly. Click Search button. |
| 1. Once the patient if found, the sample will be displayed.   If the patient is not found in the database, patients not found message will appear on the screen. Recheck the entered information and click Search button. |

**How to edit data on a sample**

**Task:** Edit a sample analysis request file

**Goal:** Use OpenELIS to modify an application for analysis already entered in the system

**When:** When you want to:

* + - Change payment information
    - Modify the lab number
    - Delete a test for a sample
    - Add a test
    - Add a new sample

**Who:** Laboratory Reception Staff, laboratory technicians

**Materials:** Analysis application form, payment receipts, computer, OpenELIS system

**Notes:** This is a form to fill, including fields mandatory and optional fields. Required fields are indicated with a red asterisk \*.

|  |
| --- |
| 1. Hover the mouse over the tab “Order” and click “Modify Order.” |
| 1. \* You can search the sample file by patient information (Name or ID) for the most recent order. For older orders, you can search by order number.      |  |  | | --- | --- | | **Condition** | **Action** | | If you use the number given by the laboratory | Click on “Search by” and from the drop-down list select “Lab No”. Then enter the lab number in the given field. | | If you use name or first name or last name | Click on “Search by” and from the drop-down list select “Last Name”/ “First Name”/ “Last Name, First Name”. Then enter the information in the given field. | | If you use patient identification code | Click on “Search by” and from the drop-down list select “Patient Identification Code”. Then enter the information in the given field. | |
| |  |  | | --- | --- | | **If…** | **Then…** | | The system cannot find the sample and displays “No patients found matching search terms” | Go back to Step#2 and confirm the entered information | | If the system finds the sample associated with the name or number | Go to Step#5 | |
| |  |  | | --- | --- | | **Yes…** | **Then…** | | If the system finds the patient | Go to Step#5 | |
| 1. A page appears where the you can:  * **Modify Order**   Shows:   * + Patient’s demographics   + Payment Status   + The option to change the order number * **Modify Tests**   Shows:   * + A list of current tests requested by the number   + A list of available tests * **Add Order**   Gives the ability to add new samples   |  |  | | --- | --- | | **If…** | **Go To…** | | You want to change the payment status | Part 1 | | You want to change the order number | Part 2 | | You want to remove some of the requested tests or remove a sample | Part 3 | | You want to add tests to those already requested | Part 4 | | You want to add a sample to the laboratory number | Part 5 | |

**Part 1: Modify the payment status**

1. Click on the drop-down list and select the option for payment status.
2. The performed action activates the “Save” button. Click it.
3. You can also search for a new sample for modification.

**Part 2: Change Order Number**

|  |  |
| --- | --- |
| 1. Type in the text field the new order number |  |
| 1. The action performed activates the Save button. Click it. |  |

**Part 3: How to remove some requested tests or delete a sample**

|  |
| --- |
| 1. Check in the table “Current Tests” where you can check the box to Remove Samples or Delete test |
| 1. The action performed activates the Save button. Click it. |

**Part 4: How to add tests to those who have already requested**

|  |
| --- |
| 1. Check in the table “Available Tests” where you can check the boxes to add tests in the corresponding lab number. |
| 1. The action performed activates the Save button. Click it. |

**Part 5: How to add a sample to a specific laboratory number**

|  |
| --- |
| 1. Under “Add Order”, click on the sample that you want to add in the drop-down list on the Sample Type.   A table appears showing the samples that you have selected and some more information such as Panels and Available Tests. To learn how to fill the table, check "Creating analysis requests”.  Once the table is filled, go to Step 2. |
| 1. The action performed activates the Save button. Click it. |

**How to create batch order entry setup**

|  |
| --- |
| 1. Hover the mouse over Order tab and click Batch Order Entry. |
| 1. \*In the Order section, enter the current date in the format dd/mm/yyyy and current time in the format hh:mm |
| 1. \*Enter the received date in the format dd/mm/yyyy and reception time in the format hh:mm. |
| 1. In the Sample Section, select the sample type from the dropdown menu.   Check the box(es) corresponding to panel(s):    **Note:** The number of panels and tests available for a sample depends on the nature of the sample (serum, plasma, blood, urine).  Panels are a set of analyzes that will be automatically selected in "Available Tests" if you select the desired panel.  **Note:** It is possible to choose several panels and tests for each sample and, if you choose a panel, you can always remove or add specific tests. |
| 1. In the Configure Barcode Entry section, select the barcode method from the dropdown list. |
| 1. Optional Fields are given as shown. You can check them. |
| 1. Click Next button at the bottom of the page. A new page appears which gives you the summary of the sample and the option to save and print. |
| 1. Enter Finish button once done, |

**How to print bar code labels**

|  |
| --- |
| 1. Hover the mouse over Order tab, select Print Bar Code Labels. |
| 1. A search field will appear on the new page. Enter the accession number either manually or you can scan it. |
| 1. Click Search button. Patient’s basic information will be displayed along with the options to:  * Print Individuals * Print Sets |
| 1. Click Print Set/ Print Label button. The barcode will be displayed. You can also set the number of times the barcode has to be printed. |

**PART 3: DEMOGRAPHIC DATA ENTRY OF A PATIENT**

This part of the manual presents the following checklists:

* How to find a patient’s record
* How to create a new patient file
* How to create initial patient entry
* How to create double patient entry
* How to edit patient file
* How to view patient record

**How to find a patient’s record**

**Task:** Use the system search function OpenELIS

**Goals:**

* Search a patient in the database OpenELIS
* Determine whether a patient is new

**When:** When you:

* Perform an analysis request or confirmatory analysis and want to join the lab number to a patient (see datasheet Create a test request and Create demand analysis confirmation)
* Want to change patient information
* Want to make sure that the patient does not exist in the database before you create a new patient record.

**Who:** Laboratory Reception Staff

**Materials:** Paper file related to the patient computer system OpenELIS

**Notes:** This is a form to fill, including fields mandatory and optional fields. Required fields are indicated with a red asterisk \*.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| |  |  | | --- | --- | | **If...** | **Go To...** | | You are on the home page | Step 2 | | You're on the "Create a sample" page or "Confirmation Sample" | Step 3 | |
| * 1. Hover the mouse over the “Patient” tab and click “Add/ Edit Patient”. |
| * 1. Click the “Search by” dropdown list, and select one of the following options: * Last Name * First Name * Last Name, First Name * Patient Identification Code * Lab No |
| * 1. Now type the appropriate information in the search field.   For example If you are looking for a patient by his first name, William, type "William" in the Search field and click on “Search" button. |
| |  |  | | --- | --- | | **If...** | **Go To...** | | OpenELIS shows a list of patients available on the database corresponding to your search criteria | Step 6 | | OpenELIS finds only one patient | Step 7 | | OpenELIS finds no corresponding patient according to the specified criteria | Then Add a “New Patient” button | |
| * 1. Click the radio button to the left of the patient you wish to select.   **Note:** For this, use the other data you have at your disposal. |
| * 1. Check that this is the right patient by comparing the information from your file with what appears on the screen.     Once you choose a patient, the input form will be filled automatically with the selected patient demographics. |
| * 1. On the registration page of the application, the "Save" button is activated. |

**How to create a new patient file**

**Task:** Create a new patient record via OpenELIS system and fill out the fields with the information.

**Goals:**

* Create a new patient record
* Complete the file by ensuring data quality

**When:** When you:

* Have verified that a patient does not exist in the OpenELIS database and you need to create a patient record.
* Perform an analysis request or confirmatory analysis and want to join the lab number to a particular patient (see datasheet Create demand analysis and Create a confirmatory analysis request)

**Who:** Laboratory Reception Staff

**Materials:** Paper file related to the patient computer system OpenELIS

**Notes:** This is a form to fill, including fields mandatory and optional fields. Required fields are indicated with a red asterisk \*.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| |  |  | | --- | --- | | **If...** | **Go To...** | | You are on the home page | Step 2 | | You're on the "Create a sample" page or "Confirmation Sample" | Step 3 | |
| * + 1. Hover the mouse over the “Patient” tab and click “Add/ Edit Patient”.     Go to Step 4 |
| * + 1. Click on “New Patient” button. |
| * + 1. Fill in the field with the National Identification number and the Subject Number. |
| * + 1. Enter the first name and last name of the patient. |
| * + 1. Enter information about patient’s address and phone number. |
| * + 1. Choose from the drop-down list the country and district of patient.   The district is activated once the country is selected. |
| * + 1. \*Enter the date of birth of patient in the format dd/mm/yyyy.   *Example : January 4, 1973 becomes 01/04/1973*    Note: Once the date of birth is entered, age is automatically calculated and displayed by the system.  If the exact date (day and / or month) is not known but the year is known, type “x” in the place of unknown        If you know the age, enter the patient’s age in the given field and the system automatically calculates the birth year. |
| * + 1. \*Select patient’s sex by clicking the appropriate option in the dropdown list. |
| * + 1. Select the most appropriate option from the dropdown list for patient’s education. |
| * + 1. Select patient’s Marital status from the drop-down list. |
| * + 1. Select the most appropriate option from the drop-down list for corresponding patient’s Nationality.     The patient is:   * Native to West Africa * Coming from a country in Africa that is not part of West Africa * Coming from a country outside Africa   In the text-field “Specify” the country of which he is a national. |
| * + 1. Verify that the information entered is correct and click the Save button.     **Note:** The Save button is activated once all the Required fields are filled. If the button is not active, make sure that all the required data has been entered.  A new page appears with a confirmation that the patient has been registered in the system. |

**How to create initial/ double patient entry**

|  |
| --- |
| * + 1. If you want to create initial patient entry, hover the mouse over Patient tab, select Study, and click on Initial Entry.     If you want to create double patient entry, hover the mouse over Patient tab, select Study, and click on Double Entry. |
| * + 1. A new page will appear. Select one of the forms from the dropdown list. |
| * + 1. \*A new page with a form will appear according to the one you have selected. |
| * + 1. \*Enter the received date and interview date in the format dd/mm/yyyy. |
| * + 1. Enter Subject Number and Site Subject Number. |
| * + 1. \*Enter lab number. |
| * + 1. Select Center Name from dropdown list.     Center Code will automatically appear in the text field according to the selected center name. |
| * + 1. Enter Family Name and First Name. |
| * + 1. \*Select patient’s sex by clicking the appropriate option in the dropdown list. |
| * + 1. Enter Date of Birth in the format dd/mm/yyyy. Age will automatically be calculated. |
| * + 1. Select Level of Education from the dropdown list. |
| * + 1. Select Marital Status from the dropdown list. |
| * + 1. Select patient’s nationality from the dropdown list. |
| * + 1. Enter the legal residence of patient. |
| * + 1. Enter the name of the doctor. |
| * + 1. Answer the questions shown by selecting the appropriate option from the dropdown list. |
| * + 1. Enter patient’s weight in kg. |
| * + 1. You can also add note in the textbox if required. |
| * + 1. Click Save button if you want to save the information. You can click Cancel button if you do not want to save.   **Note:** If Save button is not activated, check if all the required fields are filled. |

**How to edit patient file**

|  |
| --- |
| * + 1. Hover over the mouse on Patient tab, select Study, and click on Edit. |
| * + 1. A search form will appear. From the dropdown list, select the appropriate option for searching the patient.     Enter the information in the textbox and click Search button. |
| * + 1. \*A new page with a form will appear according to the one you have selected. |
| * + 1. \*Enter the received date and interview date in the format dd/mm/yyyy. |
| * + 1. Enter Subject Number and Site Subject Number. |
| * + 1. \*Enter lab number. |
| * + 1. Select Center Name from dropdown list.     Center Code will automatically appear in the text field according to the selected center name. |
| * + 1. Enter Family Name and First Name. |
| * + 1. \*Select patient’s sex by clicking the appropriate option in the dropdown list. |
| * + 1. Enter Date of Birth in the format dd/mm/yyyy. Age will automatically be calculated. |
| * + 1. Select Level of Education from the dropdown list. |
| * + 1. Select Marital Status from the dropdown list. |
| * + 1. Select patient’s nationality from the dropdown list. |
| * + 1. Enter the legal residence of patient. |
| * + 1. Enter the name of the doctor. |
| * + 1. Answer the questions shown by selecting the appropriate option from the dropdown list. |
| * + 1. Enter patient’s weight in kg. |
| * + 1. You can also add note in the textbox if required. |
| * + 1. Click Save button if you want to save the information. You can click Cancel button if you do not want to save.   **Note:** If Save button is not activated, check if all the required fields are filled. |

**How to view patient file**

|  |
| --- |
| * + 1. Hover over the mouse on Patient tab, select Study, and click on View. |
| * + 1. A search form will appear. From the dropdown list, select the appropriate option for searching the patient.     Enter the information in the textbox and click Search button. |
| * + 1. \*A new page with a form will appear according to the one you have selected. |
| * + 1. \*Enter the received date and interview date in the format dd/mm/yyyy. |
| * + 1. Enter Subject Number and Site Subject Number. |
| * + 1. \*Enter lab number. |
| * + 1. Select Center Name from dropdown list.     Center Code will automatically appear in the text field according to the selected center name. |
| * + 1. Enter Family Name and First Name. |
| * + 1. \*Select patient’s sex by clicking the appropriate option in the dropdown list. |
| * + 1. Enter Date of Birth in the format dd/mm/yyyy. Age will automatically be calculated. |
| * + 1. Select Level of Education from the dropdown list. |
| * + 1. Select Marital Status from the dropdown list. |
| * + 1. Select patient’s nationality from the dropdown list. |
| * + 1. Enter the legal residence of patient. |
| * + 1. Enter the name of the doctor. |
| * + 1. Answer the questions shown by selecting the appropriate option from the dropdown list. |
| * + 1. Enter patient’s weight in kg. |
| * + 1. You can also add note in the textbox if required. |
| * + 1. Click Save button if you want to save the information. You can click Cancel button if you do not want to save.   **Note:** If Save button is not activated, check if all the required fields are filled. |

**PART 4: GENERATION OF WORKPLANS**

OpenELIS helps you determine the tests to be using workplans. Once you choose the type of workplan you want to create - by test or unit - follow the steps for the type of workplan. OpenELIS presents a list of all samples and their associated data yet to be analysed.

This part includes three checklists:

* How to create a workplan by test, panel or unit
* How to remove samples of a workplan
* How to print a workplan

**How to create a workplan by test, by panel or unit**

|  |
| --- |
| 1. From the main menu, select the tab “Workplan”. |
| |  |  | | --- | --- | | **If you want to...** | **Go To...** | | Create a test plan of work | Step 3 | | Create a workplan by panel | Step 6 | | Create a workplan by unit | Step 9 | |
| 1. Click on “By Test Type” |
| 1. Use the drop-down menu to search the test for which you want to create a workplan.     Click on your selection. |
| 1. Once you select, all samples with an analysis request that matches the selection will be compiled.     Continue with Step 10. |
| 1. Click on “By Panel Type”     A search screen is displayed. |
| 1. Click on the Panel Type drop-down list. |
| 1. Select the panel for which you want to create a workplan. Continue with step 10. |
| 1. Click on “By Unit”     A search screen is displayed    Click on the Unit Type drop-down list and click on the laboratory unit for which you want to make a workplan. |
| 1. A workplan samples for test type, panel type or unit that you selected appears on the screen. At the head of the work plan, the number of all tests that are part of the work plan is presented. They are in order according to their laboratory numbers and dates of receipt. All samples reported as non-compliant will have a red flag side of their information.     Test workplan    Panel workplan    Per unit workplan |
| |  |  | | --- | --- | | **If you want...** | **Go to the checklist...** | | |  | | --- | | Remove samples of a plan  working | | |  | | --- | | "How to Remove | | samples of a work plan " | | | |  | | --- | | Print a work plan that you  have created | | |  | | --- | | "How to print a map job” | |  | | |

**How to remove samples of a workplan**

|  |
| --- |
| * 1. On the work plan on the screen, use the lab number, the test name or the date of receipt to seek the correct samples to be removed. |
| 2.   |  |  | | --- | --- | | **If you want to...** | **Go to...** | | Delete other samples of the same workplan | Step 1 | | Print a workplan that you have created | “How to print a map job” | |

**How to print a workplan**

|  |
| --- |
| * 1. Confirm that the work plan on the screen includes all samples and tests to achieve. |
| 1. Click the "Print Work Plan".     A new window will open with your work plan in PDF. |

**PART 5: SEIZURE OF RESULTS ANALYSIS OF APPLICATIONS**

Once the samples and patient exist in the system, it is possible to record the results of analyzes made from the samples. It is at this stage that the lab technician plays an important role in the functioning of the information system. There are several ways to capture the results of laboratory tests for a patient: enter results by type of laboratory analysis, or search results by patient, lab number or the status of the analysis (conducted or not made).

The results are displayed in order of the date of receipt and subsequently by laboratory number. From left to right, the results page still contains six columns of data.

DATE OF

TEST

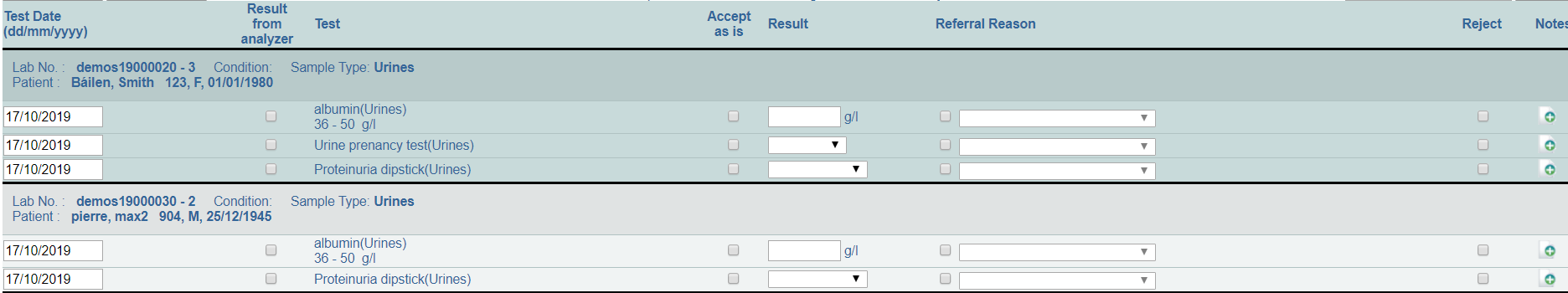
THE RESULT ON PLC

THE NAME OF TEST

THE RESULT

THE REFERENCE AND THE REASON

NOTES



For results to be referred to external laboratories for confirmation, you must first indicate the initial results. This section includes the following checklists:

* How to capture results
* How to order requests for reference to external laboratory analysis
* How to enter the results of samples sent to the external laboratory

All samples reported as non-compliant will have a red flag side of their results.

**How to capture results**

|  |
| --- |
| * 1. From the main menu, select the “Results tab”. |
| |  |  | | --- | --- | | **If you want to…** | **Go To…** | | Enter the results by unit laboratory | Step 3 | | Enter the results by patient | Step 4 | | Enter the results by laboratory number | Step 10 | | Enter the results by status (done or not done) | Step 13 | |
| 1. Click “Enter by Unit”.     Click the laboratory unit for which you want to enter results.    Continue with step 17. |
| 1. Rollover option “Search” on the Results tab until menu choices appear.     Click on “By Patient”. |
| 1. Click on Search by… drop-down list and select one of the following options:  * Last name * First name * Patient identification code * Lab No   If you are looking for a patient by his first name, William, select search by “first name”, type “William” in the search field and click on Search button. |
| |  |  | | --- | --- | | **If...** | **Go To...** | | OpenELIS shows a list of patients available on the database corresponding to your search criteria | Step 7 | | OpenELIS finds only one patient | Step 8 | |
| 1. Click the radio button to the left of the patient you wish to select.   **Note:** For this, use the other data you have at your disposal. |
| 1. Check that this is the right patient by comparing the information from your file with what appears on the screen. |
| 1. Click “Get Tests For Patient”     Continue with step 16 |
| 1. Rollover the Results tab and click on Search from the menu until next menu appears.   Click on “By Order” |
| 1. A search field will appear. Enter lab number in that field. |
| 1. Click on “Get Tests for Accession Number”     Continue with step 16. **demos19000147** |
| 1. On the main menu, move the mouse over “Results” and then over “Search” until another menu appears. Click “By Test, Date or Status” |
| 1. Enter collection date (in the format dd/mm/yyyy), received date (in the format dd/mm/yyyy), the test name and / or analysis status and / or sample status. |
| 1. Click “Get Tests For Status” |
| 1. Enter the date when the test was performed in the "Date of the Test." It may be that the existing dates must be updated. |
| |  |  | | --- | --- | | **If...** | **Then...** | | The result comes from a PLC | Check the box in the “Result from analyzer” | | The result does not come from a PLC | Make sure the box “Controller of Income” is not checked and go to Step 19 | |
| 1. Enter the results.   Examples:    Color Indications:   * + If the result is high or low (outside the normal range), the result field turns yellow.   + If the result is too high or too low, the result field turns red to indicate an alert.   + If the result is in normal range, the result field remains white. |
| |  |  | | --- | --- | | **If...** | **Then...** | | The results are to be referred to an external library | Check the column “Referral Reason” and go to step 20 | | A reference is not necessary | Continue with step 23 | |
| 1. Select why the reference is required from the drop-down list. |
| 1. Click the icon  to open the text box for “Notes”.     If you want to mention any important information, you can type in the text box.  Click the icon  to close the “Note” text box after you have typed your comments. |
| 1. Make technical validation. Check the “Accept as is” box.     You will receive a warning asking you to confirm that you technically validate these results. Click “OK”. |
| |  |  | | --- | --- | | **If...** | **Then...** | | You have more results to enter on this results’ page | Go back to Step 16 | | You have entered all the Results | Click on the “Save” button at the bottom of the page. | | You do not want to save your results | Click “Cancel” | | You have more results to enter but for another patient, laboratory number, status or laboratory unit | Go to Step 2 | |

**PART 6: THE REFERENCE TO THE LABORATORY EXTERNAL**

**How to complete a reference**

|  |
| --- |
| * 1. On the “Results” tab on the main menu, click on “Referred Tests”.     A list of all samples referred when entering the results and data appear. |
| * 1. Identify the sample to see for the lab number, the date of request, the type of sample and / or the name of the test. |
| * 1. Confirm the reason for the reference that appears in the text box under the column “Reason”.     If applicable, use the dropdown menu to select a new reason. |
| * 1. Type the name of the technician who referred the sample in the text box under the column “Referrer” |
| * 1. \*Using the dropdown menu, select and click the external laboratory to which IPCI will send the interim sample under the column “Institute”. |
| * 1. Confirm or change the date in the text box under the column “Sent Date” in the format dd/mm/yyyy |
| * 1. Select the test that the external laboratory is asked to do. |
| |  |  | | --- | --- | | **If you want to...** | **Go To...** | | Edit the requested test | Step 9 | | Delete a requested test | Step 10 | | Add other desired tests | Step 11 | |
| * 1. In the test field to change, use the dropdown menu to select the test that the external laboratory is asked to do.     Continue with step 13. |
| * 1. Click on underlined “Remove” at the left of the test.     Continue with Step 13 |
| * 1. Click on the underlined word “Add Test Request”. A new text box appears with a dropdown menu. |
| * 1. Use the dropdown menu and select the test to add.   Continue with step 13. |
| |  |  | | --- | --- | | **If...** | **Go To...** | | You have other samples to refer to laboratory | Step 2 | | Want to remove a reference to the external laboratory | Step 14 | | You recorded all tests referred to external laboratories | Step 15 | | You have received a report with Results of an external laboratory | See “How To Enter Results Of Samples Referred To External Laboratory” | |
| * 1. Check the box to column “Cancel Referral” if you want to make the referred sample inactive. |
| * 1. Save your work by clicking “Save” button placed at the bottom of the page.   You can also click “Cancel” button if you do not want to save. |

**How to enter the results for confirmation test (Test sent to an external laboratory results received from the external laboratory)**

|  |
| --- |
| * + 1. On the “Results” tab on the main menu, click on “Referred Tests”. |
| * + 1. A list of all the samples referred when entering the results and data appear.     **NOTE:** You cannot change the test asked for a sample that has already been referred to the external laboratory. To redo the analysis requests to external laboratory again, add more tests by clicking the underlined words "Add Test Request". Go to the checklist "How To Refer to External Laboratories Samples" for specific instructions. |
| * + 1. In the column “Result”, use the text box to indicate the results according to the report received from the external laboratory. |
| * + 1. Type the date when the report was received in the format (dd/mm/yyyy). |
| * + 1. Click the icon  to open the text box “Note”. |
| * + 1. Type notes on the sample and / or results in the text box. |
| * + 1. Click the icon  to close the “Note” text box.   The icon changes to  to indicate the presence of notes in the text box.    Once you have saved all your changes and additions, the note appears as “Prior Notes” |
| * + 1. Check the box in column “Cancel Referral” if you want to make the referred sample inactive. |
| * + 1. Save your work by clicking “Save” button placed at the bottom of the page.   You always have the option to not save your work and click “Cancel” button. |

**PART 7: VALIDATION OF RESULTS**

To facilitate the validation of results by biologists, the OpenELIS system displays all results recorded by the laboratory unit. They are presented in laboratory number order, the name of the test and the result seized by the laboratory technician. The checklist that follows explains how to accept or reject the results.

**How to validate the results**

|  |
| --- |
| * 1. From the main menu, select “Validation” tab, click “Routine”.     A new page will open displaying a dropdown menu to search for the laboratory unit. Select the desired laboratory unit.    A list of all the results ready for validation in the laboratory is displayed. |
| |  |  | | --- | --- | | **If...** | **Go To...** | | You want to accept or reject all the results presented | Step 3 | | You want to select the results to accept or reject individually | Step 7 | |
| |  |  | | --- | --- | | **If...** | **Then...** | | You want to accept all the results presented on the page | Check “Save all results” | | You want to accept all the results associated with a specific laboratory number | Check the box in the column “Save” associated with the lab number | | You want to reject all the results presented on the page | All the boxes in Retest are checked | | You want to reject all the results associated with a specific laboratory number | Check the box in the column “Retest” associated with the lab number | |
| |  |  | | --- | --- | | **If...** | **Go To...** | | You want to deselect some accepted or rejected results | Uncheck the box corresponding to the test | | You want to accept some rejected results | Check the box in the “Save” column corresponding to that test | | You want to reject some accepted results | Check the box in the “Retest” column corresponding to that test | |
| * 1. Click the icon  to open the “Note” text box     Type in the text box some information that seems important to mention.  Click the icon  to close the “Note” text box once you have typed the information. |
| * 1. K  |  |  | | --- | --- | | **If...** | **Go To...** | | You still have results to accept or reject on the page | Go back to Step 2 | | You no longer have results to validate | Click the “Save” button at the bottom of the page. | | You do not want to save the results that you just validated | Click “Cancel” button at the bottom of the page. | |

**PART 14: GENERATION OF REPORTS**

The availability of high quality data for decision-making based on evidence is the purpose of a laboratory information system. The OpenELIS software provides reports that contain data well organized according to the needs of physicians and laboratory managers receiving reports. Currently, the reports available are classified into three categories:

|  |  |
| --- | --- |
| **CATEGORY** | **REPORT** |
|  |  |
| individual report | Patient Outcome ( "Patient Test by the Statute") |
|  |  |
| Comprehensive Report - level | Summary HIV tests, Summary of all tests, Tests |
| laboratory | Confirmation ( "Confirmation") Samples Report |
|  | Referred to external laboratories ( "Referred to") |
|  |  |
| Quality Control Reports - | the backward validations, Noncompliance by Date, Non- |
| the laboratory | compliance with Section and Reason, the Audit Review |
|  |  |

In this section there are four checklists about generating reports.

**How to generate reports on patient outcomes**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| * 1. From the main menu, select “Reports” tab, click “Routine”.      |  |  | | --- | --- | | **If you want to report...** | **Go To...** | | The results of a single patient | “Patient Status Report” and click Classic Version    Continue with step 2 | |  |  | |  |  | |
| |  |  | | --- | --- | | **If...** | **Then...** | | You want a Patient Status Report by Subject Number | Type the subject number in the text box | | You want a Patient Status Report by range of order number / lab number | Type the starting lab number in the first textbox and the end of range in the second.    Continue with step 3 | |
| * 1. To generate the report format, click on Generate printable version     PDF will be generated as shown below. |
| * 1. To generate the summary of all the results, click on “Aggregate Reports” and then click “Summary of All Tests”.     Once a new page will appear, enter the start date and the end date in the format dd/mm/yyyy for which you want to view the summary.  Click “Generate Printable Version” to generate PDF. |

**PART 8: GENERATION OF REPORTS ON THE BASIS OF PARAMETERS**

|  |
| --- |
| * 1. From the main menu, select “Reports” tab, click “Study”.     Then click the report that you want to generate. |
| * 1. Reports are generated on the basis of parameters.   Following are the reports based on different parameters:  **Order Number/ Lab Number**   * ARV * EID * VL * Serology Routine * Indeterminate * Special Request   **Subject Number**   * Collected ARV Patient Report * Associated Patient Report     Non Conformity Report can be generated on the basis of following parameters:   * Date * Unit and Reason * Lab No |
| * 1. To generate a report on the basis of order number, click on the report that you want to generate.     Enter a range of order number/ lab number or simply an order number in the given fields. For a single order number, leave the right box empty.    Click on Generate printable version button. |
| * 1. To generate a report on the basis of subject number, click on the report that you want to generate.     Enter the subject number in the given field.    Click on Generate printable version button. |

# PART 9: ADMIN

# Edit the test name

**Task:** Change the name of a test / exam

**Who:** Director of the laboratory; the Head of

**When:** When there is a spelling that appears on the screen; when the test name changed available

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** "Rename existing  test names."  From this link, you can view and edit the names of the tests that are already programmed in the catalog of the tests. |  |
| 4 | **CLICK** the name of the desired test.  In this example, the spelling "Blood Shugar" is incorrect.  You will get to the edit page ( "Edit") to edit and correct the test name. |  |
| 5 | It asks to SPECIFY the test name for 4 categories:   * The name in French * The name in English * The name as it should appear on the reports in French * The name as it should appear on the reports in English   **INQUIRE** fields as shown at right. |  |
| **TO NOTE :**If you do not have access to the name in English, you can enter a substitution element but it may be that it will not comply with the guidelines for laboratory information systems. Refer to your accrediting agency. | |
| 6 | **CLICK** the "Save" button.  If, however, you want to CANCEL the modification, CLICK on the "Cancel" button. |  |
| 7 | **REVISE** CHECK and the names entered in each category. If they are correct, CLICK on the "Accept" button.  You will come to the page of tests and you can continue to correct further testing if desired. |  |
| 8 | If the new names are not correct, CLICK on the "Reject" button.  You will come to the previous page where you can change the names. |  |

# Changing the name of a panel

**Task:** Change the name of a panel of tests

**Who :**Head/Director of the laboratory

**When:** When there is a spelling error that appears on the screen; when the name of the panel available has changed

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** "Rename Existing Panels".  From this link, you can view and edit the names of the panels that already exist in the catalog of the tests. |  |
| 4 | **CLICK** the name of the desired panel.  You will get to the edit page ( "Edit") the name of the panel.  If, however, you want to CANCEL the modification, CLICK on the Finished" button. |  |
| 5 | There must be the name of the panel for 2 categories:   * The name in French * The name in English   **INQUIRE** fields as shown at right. |  |
| **TO NOTE :**If you do not have access to the name in English, you can enter a substitution element but it may be that it will not comply with the guidelines for laboratory information systems. Refer to your accrediting agency. | |
| 6 | **CLICK** the "Save" button.  You will reach the confirmation page.  If, however, you want to CANCEL the modification, CLICK on the "Cancel" button. |  |
| 7 | **Recheck** the names entered in each category. If they are correct, CLICK on the "Accept" button.  You will come to the page panels and you can continue to correct other panels if desired. |  |
| 8 | If specified names are not correct, CLICK on the "Reject" button.  You will come to the previous page where you can make changes in the names. |  |

# 3 Edit a sample type name

**Task:** Edit a sample type name (specimen)

**Who :**Head/Director of the laboratory

**When:** When there is a spelling error that appears on the screen

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** "Change names of sample types."  From this link, you can view and edit the names of sample types that are already programmed in the catalog of the tests. |  |
| 4 | **CLICK** on the desired type of sample.  You will get to the edit page ( "Edit") of the sample type name.  If, however, you want to CANCEL the modification, CLICK on the "Finished" button. |  |
| 5 | There must name the type of sample to 2 categories:   * The name in French * The name in English   **INQUIRE** fields as shown at right. |  |
| **TO NOTE :**If you do not have access to the name in English, you can enter a substitution element but it may be that it will not comply with the guidelines for laboratory information systems. Refer to your accrediting agency. | |
| 6 | **CLICK** the "Save" button.  You will reach the verification page.  If, however, you want to CANCEL the modification, CLICK on the "Cancel" button. |  |
| 7 | **Recheck** the names entered in each category. If they are correct, CLICK on the "Accept" button.  You will come to the page of sample types and you can continue to correct other types of sample if desired. |  |
| 8 | If informed names are not correct, CLICK on the "Reject" button.  You will come to the previous page where you can take the change of names. |  |

# 4 Change the name of Test Sections

**Task:** Changing the name of a unit of analysis (test section, laboratory unit)

**Who :**Director of the laboratory; the Head of

**When:** When there is a spelling error that appears on the screen

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** "Rename Existing Test Sections."  From this link, you can view and edit the names test sections which are already programmed in the catalog of the tests. |  |
| 4 | **CLICK** on the desired test section.  You will get to the edit page ( "Edit") of the test section.  If, however, you want to CANCEL the modification, CLICK on the "Done" button. |  |
| 5 | There must be the name of the unit of analysis for 2 categories:   * The name in French * The name in English   **INQUIRE** fields as shown at right. |  |
| **TO NOTE :**If you do not have access to the name in English, you can enter a substitution element but it may be that it will not comply with the guidelines for laboratory information systems. Refer to your accrediting agency. | |
| 6 | **CLICK** the "Save" button.  You will reach the confirmation page.  If, however, you want to CANCEL the modification, CLICK on the "Cancel" button. |  |
| 7 | **Recheck** the names entered in each category. If they are correct, CLICK on the "Accept" button.  You will come to the page of analysis units and you can continue to correct other analysis units if desired. |  |
| 8 | If informed names are not correct, CLICK on the "Reject" button.  You will come to the previous page where you can take the change of names. |  |

# 5 Change the Name of a Measurement Unit

**task:** Changing the name of a unit of measure

**Who :**Director of the laboratory; the Head of

**when:** When there is a spelling error that appears on the screen

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** on "Rename unit of measurement."  From this link, you can view and edit the names of the units of measurement that are already programmed in the catalog of the tests. |  |
| 4 | **CLICK** on the desired unit of measuring entry.  You will get to the edit page ( "Edit") of the unit of measurement.  If, however, you want to CANCEL the modification, CLICK on the "Finished" button. |  |
| 5 | There must be the name of the unit of measurement.  **INQUIRE** field as shown at right. |  |
| 6 | **CLICK** the "Next" button.  You will reach the confirmation page.  If, however, you want to CANCEL the modification, CLICK on the "Reject" button. |  |
| 7 | **Recheck** the name. If correct, CLICK on the "Accept" button.  You will come to the page of measurement units and you can continue to correct other units of measurement if desired. |  |
| 8 | If the name is not filled in properly, CLICK on the "Reject" button.  You will come to the previous page where you can take the change of names. |  |

# 6 View the Test Catalog

**Task:** Read, search, conduct audits of testing catalog

**Who :**Director of the laboratory; the head of the service; other necessary

**When:** At any moment

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** "View Test Catalog."  From this link, you can view the tests that are already programmed in the test catalog. |  |
| 4 | If you want to consult the definitions of terms used in the test catalog, CHECK the box next to "Show Guide". |  |
|  | The guide will appear on the same page.  **UNSELECT** the box to close the guide. |  |
| 5 | **CHECK** box (or boxes) corresponding to the test you want to see.  The list of tests and specifications appear on the same page.  The specifications for each test are:   * Test Name * Name in English * Name of reports * Unit of Measure * Test unit * Sample Type * Panel * Result type * Significant digits * Reference Value * Limits results by gender and age * normal range * valid range |  |
|  | **TO NOTE :** See the guide for definitions of each parameter. | |

# 7 Add a new test

**Task:** Add a new test to test catalog

**Who :** Head/ Director of the laboratory; the Head of

**When:** When you have to work with (téchniquer) a test that is not yet identified in the catalog

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **STEP** | | **ACTION** | | |
| 1 | | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  | |
|  | |
| 2 | | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  | |
|  | |
| 3 | | **CLICK** "Add new tests." |  | |
| 4 | | If you want to consult the definitions of terms used in the test catalog, CHECK the box next to "Show Guide".  **UNSELECT** the box to close the guide. |  | |
|  | | Then you go FILL information about the test on several pages of forms. The fields displayed with a red star\*are mandatory. We can not save the entry if all the mandatory fields are not filled. | | |
| 5 | | **INQUIRE** the name of the test in French, the name of the test in English.  Then INQUIRE test the name that will appear on the reports (often a shortened version) in French and English.  If the test name and the name of the report are the same CLICK on the button "Copy from Test Name" to automatically fill in the reporting test name in English and French. |  | |
| 6 | | **SELECT** the Test Section to which the test belongs from the drop down menu. |  | |
| 7 | | If the test is part of a panel of tests, SELECT the panel that owns the test from the dropdown menu.  A test can belong to multiple panels. In this case, SELECT panels one by one from the drop down menu. The panels will be displayed. If you selected a panel by mistake, CLICK on the "X" next to the panel to remove it. |  | |
| 8 | | **SELECT** the result type from the drop down menu.  The choices are:   * Select List * Numeric * Free Text * Alphanumeric * Multiselect * Cascading multiselect |  | |
|  | | **NOTE :** See the guide for definitions of each parameter. | | |
| 9 | | If the result requires a measurement unit, **SELECT** the unit of measurement from the drop down menu. | |  |
| 10 | | **CHECK** the box "Active" to activate the test; it can now be associated with an order.  **CHECK** the "Orderable" box to put the test on the order form (order). | |  |
| 11 | | **CLICK** on the "Next" button to continue with the information about the new test.  **CLICK** the "Back" button to cancel. | |  |
| 12 | | If you want to consult the definitions of terms used in the test catalog, CHECK the box next to "Show Guide". (1)  **UNSELECT** the box to close the guide.  **CHECK** the information already entered.  Then, select the type of sample (specimen) from the drop down menu. (3)  A test can be associated with several types of sample. In this case, SELECT sample types one by one from the drop down menu. The sample types will be displayed. If you selected a type error, CLICK on the "X" next to the type of sample to remove. | |  |
| 13 | | The table display order of the tests will appear on the same page when you select the type of sample.  The order refers to the order on the order form (order) in the "Order" module.  The test will appear **green** down the list of tests.  **CLICK** and DRAG on the test side by arrows to move the test in the display order. | |  |
| 14 | | **CLICK** on the "Next" button to continue with the information about the new test.  **CLICK** the "Back" button to return to previous form. | |  |
| 15 | | First, CHECK the information you just completed.  Then SET the limits to the result. (2) | |  |
| 16 | | If the normal range of the result does change according to the patient’s sex, CHECK the box "Sex dependent."  If the normal range of the result does not vary depending on the patient's sex, DO NOT CHECK the box "Sex dependent." | |  |

# 8 Disable test

**task:** Making an idle test

**Who :**Director of the laboratory; the Head of

**when:** It takes a particular test to be active to record information. If a test is not available (not reactive, down PLC, changes in laboratory guidelines, etc.), we can remove the test temporarily catalog. This helps to avoid errors on the part of users because they will not be able to choose the review by chance.

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** "Activate / Deactivate tests." |  |
| 4 | Tests with checked  boxes are already active. To make a test inactive, UNSELECT the box next to the test. The test name will become green.  (See checklist 9 to make an active test.) |  |
| 5 | **CLICK** the "Save" button to proceed to the confirmation page.  **CLICK** on the "Cancel" button to cancel. |  |
| 6 | **Recheck** the changes that you have made.  **CLICK** on the "Accept" button to finish and return to the activation page. **CLICK** on the navigation "Test Management" or to use the main navigation bar.  If you want to return to the previous page without keeping your changes, CLICK on the "Previous" button. |  |

# 9 Activate test

**task:** Making an active test catalog tests

**Who :**Director of the laboratory; the Head of

**when:** It takes a particular test to be active to record information. Otherwise, we will be unable to order this test or record data about this test. A given type of sample should have at least one active test are associated to be activated itself.

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** "Activate / Deactivate tests" |  |
| 4 | Tests with checked boxes are already active. To make an active test currently inactive, CHECK the box next to the test. The test name will become green.  (See checklist 8 to make an idle test.) |  |
| 5 | **CLICK** on the 'Save' button to continue.  You arrive at the verification page. CLICK on the " Accept"  button.  CLICK on the "Previous" button to cancel. |  |
| 6 | To return to the test management menu, CLICK on the navigation bar "Test Management" or to use the main navigation bar.  If you want to return to the previous page without keeping your changes, CLICK on the "Cancel" button. |  |

# 10 Make a test available or unavailable to order

**task:** Set or remove a test from the choice of tests ordered

**Who :**Director of the laboratory; the Head of

**when:** A test available for order can be ordered at the time of registration of the order. If the test is not available for order, it can be ordered only as a reflex test. The default is a test is available for order. Those who are active but not available to order are available as reflex testing in an algorithmic protocol.

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** "Enable / disable test orderability" |  |
| 4 | Tests with checked boxes are already available to order. To make a test available for order, CHECK the box next to the test. The test name will become green.  **UNSELECT**the box to make a test not available for order. |  |
| 5 | **CLICK** on the 'Save' button to continue.  **CLICK** on the "Cancel" button to cancel. |  |
| 6 | **Recheck** the changes you have made and CLICK on the "Accept" button.  To return to the test management menu, CLICK on the navigation bar or the mian navigation bar.  If you want to return to the previous page without keeping your changes, CLICK on the "Back" button. |  |

# 11 Create a new unit of analysis

**task:** Add a new unit of analysis (laboratory unit test section)

**Who :** Director of the laboratory; the Head of

**when:** When you divide the workflow into several sections analysis.

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** on "Manage Test Units." |  |
| 4 | **CLICK** "Create New Test Unite." |  |
| 5 | You get to the page of analysis units. The existing test units are displayed. Also the units that are not yet active (they have no associated test) are shown below.  SPECIFY the name of the unit of analysis for 2 categories:   * The name in French * The name in English   **INQUIRE** fields as shown at right. |  |
|  | **TO NOTE :**If you do not have access to the name in English, you can enter a substitution element but it may be that it will not comply with the guidelines for laboratory information systems. Refer to your accrediting agency. | |
| 6 | **CLICK** the "Save" button.  You will reach the confirmation page.  If, however, you want to CANCEL, CLICK on the "Cancel" button. |  |
|  | **Recheck** the names entered in each category. If they are correct, CLICK on the "Accept" button.  You will come to the page of analysis units and you can continue to add another unit of analysis if desired.  If specified names are not correct, CLICK on the "Reject" button. You will come to the previous page where you can make the changes in the names. |  |

# 12 Establishing the display order of analysis units

**task:** Specify the display order of the units of analysis as they appear on the order page and elsewhere in the system.

**Who :** Director of the laboratory; the Head of

**when: -** After creating new units of analysis

* After changing the names of the units of analysis
* If the order current display leads to user confusion

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** on "Manage Test Units." |  |
| 4 | **CLICK** on "Set Test Unit Order" |  |
| 5 | **CLICK** and DRAG on the side of the unit to the arrows to move in the display order.  In this example, the unit "Immunology" is moved to the fourth position in the list.  **CLICK** on the 'Save' button to continue. CLICK on the "Cancel" button to cancel. |  |
|  | **TO NOTE :** The units inactive-that is to say, those without test-related does not appear on the display order list. It must involve a test unit so that it appears in the list. | |
| 6 | **Recheck** and order. If correct, CLICK on the "Accept" button.  You will get to the edit page of the display order and you can still make changes if desired.  If the order is not correct, CLICK on the "Reject" button. You will come to the previous page where you can resume the task. |  |

# 13 Affect the analysis (test) to an evaluation unit

**task:** Assign an analysis (a test) to an evaluation unit.

**Who :** Director of the laboratory; the Head of

**when: -** After adding a new test

* After creating a new unit of analysis in order to activate

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** on "Manage Test Units" |  |
| 4 | **CLICK** on "Test Assignment" |  |
| 5 | **CLICK** the name of a test.  A drop down menu will appear. |  |
| 6 | **SELECT** the desired unit from the drop down menu.  **CLICK** on the 'Save' button to continue. CLICK on the "Cancel" button to return to the previous page. |  |
| 6 | **Recheck** the allocation. If correct, CLICK on the "Accept" button.  You will come to the unit selection page and you can still make changes if desired.  If the assignment is not correct, CLICK on the "Reject" button. You will come to the previous page where you can resume the task. |  |

# 14 Create a new type of sample

**task:** Add a new type of sample (specimen)

**Who :** Director of the laboratory; the Head of

**when:** When a particular specimen is not yet represented in the catalog tests

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** on "Manage Sample Types" |  |
| 4 | **CLICK** "Create New sample type." |  |
|  | You get to the page of sample type. The existing sample types are displayed. Also the sample types that are not active (they have no associated test) are shown. |  |
| 5 | SPECIFY must name the type of sample to 2 categories:   * The name in French * The name in English   **INQUIRE** fields as shown at right. |  |
|  | **TO NOTE :**If you do not have access to the name in English, you can enter a substitution element but it may be that it will not comply with the guidelines for laboratory information systems. Refer to your accrediting agency. | |
| 6 | **CLICK** the "Save" button. You will reach the confirmation page.  If, however, you want to CANCEL, CLICK on the "Cancel" button. |  |
|  | **Recheck** the names entered in each category. If they are correct, CLICK on the "Accept" button.  You will come to the page of analysis units and you can continue to add another unit of analysis if desired.  If specified names are not correct, CLICK on the "Reject" button. You will come to the previous page where you can make changes in the names. |  |
|  |
| **NOTE :** A sample type will not appear on the order page before it is  activated. To enable it, you must assign at least one analysis. See checklist 16 Label test a sample type. | |

# 15 Establishing the display order of sample types

**task:** Specify the order of samples display as they appear on the order page and elsewhere in the system.

**Who :** Director of the laboratory; the Head of

**when: -** After creating new types of sample

* After changing the names of sample type
* If the order current display leads to user confusion

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** on "Manage Sample Types" |  |
| 4 | **CLICK** on "Set Sample Type Order" |  |
| 5 | **CLICK** and DRAG on the sample type side by the arrows to move in the display order.  In this example, sample type "Whole blood" is moved to third position in the list.  **CLICK** on the 'Save' button to continue. CLICK on the "Cancel" button to cancel. |  |
|  | **NOTE :** The inactive sample types-that is to say, those without associated-tests do not appear on the display order list. It must involve a test sample type to appear in the list. | |
| 6 | **Recheck** the order. If correct, CLICK on the "Accept" button.  You will get to the edit page of the display order and you can still make changes if desired.  If the order is not correct, CLICK on the "Reject" button. You will come to the previous page where you can resume the task. |  |

# 16 Assign testing a sample type

**task:** Associating a test (analysis) to one kind of sample.

**Who :** Director of the laboratory; the Head of

**when: -** After adding a new test

* After creating a new type of sample to activate

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** on "Manage Sample Types". |  |
| 4 | **CLICK** on "Test Assignment" |  |
| 5 | **CLICK** the name of a test.  A drop down menu will appear.  CLICK on the "Cancel" button to cancel. |  |
|  | **SELECT** the desired sample from the drop down menu.  **CLICK** on the 'Save' button to continue. CLICK on the "Cancel" button to return to the previous page. |  |
| 6 |
| 6 | **REVISE** CHECK and allocation. If correct, CLICK on the "Accept" button.  You get to the selection page of sample types and you can make changes if desired.  If the assignment is not correct, CLICK on the "Reject" button. You will come to the previous page where you can resume the task. |  |

# 17 Create a new unit of measurement

**task:** Add a new unit of measurement

**Who :** Director of the laboratory; the Head of

**when:**  - Before creating a new test and measurement unit is not yet represented in the catalog tests

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** "Manage Units of Measure." |  |
| 4 | **CLICK** "Create New Units of Measure" |  |
| 5 | You get to the measurement units’ page. The existing units of measure units are displayed.  SPECIFY the name of the unit of measure (uom) in the "English" textbox.  **INQUIRE** field as shown at right. |  |
|  | **TO NOTE :**Now the box to specify the unit of measurement reads "English" but you must enter the unit of measurement in your own language. A good practice is to use standard international conventions. | |
| 6 | **CLICK** the "Save" button.  You will reach the confirmation page.  If, however, you want to CANCEL, CLICK on the "Cancel" button. |  |
|  | **Recheck** that the unit of measurement is correct. If correct, CLICK on the "Accept" button.  You will come to the page of measurement units and you can continue to add another unit if desired.  If the specified measurement unit is not correct, CLICK on the "Reject" button. You will come to the previous page where you can make the change. |  |

# 18 Create a new panel analysis

**task:** Add a new panel analysis

**Who :** Director of the laboratory; the Head of

**when:** If a panel is not yet represented in the catalog tests

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
|  |
| 3 | **CLICK** on "Manage Panels " |  |
| 4 | **CLICK** "Create New Panel." |  |
| 5 | You get to the page panels. Current panels are displayed. Also panels that are not yet active (they have no associated test) are shown.  SPECIFY the name of the unit of analysis for 3 categories:   * The name in French * The name in English   **INQUIRE** fields as shown at right. |  |
|  | **NOTE:** If you do not have access to the name in English, you can enter a substitution element but it may be that it will not comply with the guidelines for laboratory information systems. Refer to your accrediting agency. | |
| 6 | **SELECT** the sample type required for this panel from the drop down menu.  **CLICK** the "Save" button. You will reach the confirmation page.  If, however, you want to CANCEL, CLICK on the "Cancel" button. |  |
| 7 | **Recheck** the names entered in each category and the specified sample. If they are correct, CLICK on the "Accept" button.  You will come to the page panels and you can continue to add another panel if desired.  If specified names or samples are not correct, CLICK on the "Reject" button. You will come to the previous page where you can continue changing the names or specify the sample. |  |

# 19 Establish the order of panels display

**task:** Specify the display order of the panels as they appear on the order page and elsewhere in the system.

**Who :** Director of the laboratory; the Head of

**when: -** After creating new panels

* After changing the names of panels
* If the order current display leads to user confusion

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
| 3 | **CLICK** on "Manage Panels" |  |
| 4 | **CLICK** on "Set Panel Order." |  |
| 5 | **CLICK** and DRAG on the panel side of the arrows to move in the display order.  In this example, "Typage lymphocytaire" panel is moved to last in the list.  **CLICK** on the 'Save' button to continue. CLICK on the "Cancel" button to cancel. |  |
| 6 | **Recheck** the order. If correct, CLICK on the "Accept" button.  You will get to the edit page of the display order and you can still make changes if desired.  If the order is not correct, CLICK on the "Reject" button. You will come to the previous page where you can resume the task. |  |

# 20 Affect analysis (test) to a panel

**task:** Associating a test (analysis) in a panel.

**Who :** Director of the laboratory; the Head of

**when: -** After adding a new panel

* After creating a new panel to activate

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **NAVIGATE** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Test Management".  You will reach the catalog of test management page. |  |
| 3 | **CLICK** on "Manage Panels" |  |
| 4 | **CLICK** on "Test Assignment" |  |
| 5 | A drop down menu will appear.  **SELECT** the desired panel from the drop down menu. |  |
|  | Two areas appear: an area with the tests specified for the selected panel and an area with all the available tests. |  |
| 6 |
| 7 | **CLICK** the desired test.  **USE** the arrows between the two zones in order to move a test panel in the area (<) or remove a panel test (>).  **CLICK** the "Save" button to save. |  |
| 8 | **CHECK** that the test appears from the test panel. They are automatically displayed in alphabetical order. |  |

# 21 Add/Edit Analyzer Test Names

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Analyzer Test Names"  You will see the list of analyzer names. |  |
| 3 | **CHECK** the Analyzer Test Name that you want to add.  **CLICK** on the Add/ Edit button.  You can see more analyzer test names by clicking on the Next button. |  |
| 4 | Analyzer and Analyzer test name will appear of the selected analyzer test name.  **CLICK** on Actual test name. |  |
| 5 | A drop down menu will appear.  **SELECT** the desired test name from the drop down menu.  **CLICK** on the Save button. |  |

# 

# 22 Add Dictionary

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Dictionary"  You will see the list of dictionary entries. |  |
| 3 | **CLICK** on the Add button.  You can see more analyzer test names by clicking on the Next button. |  |
| 4 | Add Dictionary form will appear.  **SELECT** Category from dropdown list.  **ENTER** Dictionary Entry and Local Abbreviation.  Fields with red asterick \* are mandatory to fill. |  |
| 5 | **CLICK** on the Save button.  If you do not want the changes to be saved, **CLICK** Exit button. |  |

# 23 Edit Dictionary

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Dictionary"  You will see the list of dictionary entries. |  |
| 3 | **CHECK** the box at the left to the dictionary entry that you want to edit.  You can check only one dictionary entry. |  |
| 3 | **CLICK** on the Edit button.  You can see more analyzer test names by clicking on the Next button. |  |
| 4 | Edit Dictionary form will appear.  **EDIT** the desired information.  Fields with red asterick \* are mandatory to fill. |  |
| 5 | **CLICK** on the Save button.  If you do not want the changes to be saved, **CLICK** Exit button. |  |

# 24 Deactivate Dictionary

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Dictionary"  You will see the list of dictionary entries. |  |
| 3 | **CHECK** the box at the left to the dictionary entry that you want to deactivate.  You can check multiple dictionary entries. |  |
| 3 | **CLICK** on the Deactivate button.  You can see more dictionaries by clicking on the Next button.  You can see that the corresponding Is Active column will become **N** |  |

# 25 Add Organization

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Organization"  You will see the list of organizations. |  |
| 3 | **CLICK** on the Add button.  You can see more organzations by clicking on the Next button. |  |
| 4 | Add Organization catalog will appear.  **ENTER** organization name and its prefix.  By default, the organization is active, but you can set it to N.    **ENTER** Internet Address.  **CHECK** the boxes for type of activity.  Fields with red asterick \* are mandatory to fill. |  |
| 5 | **CLICK** on the Save button.  If you do not want the changes to be saved, **CLICK** Exit button. |  |

# 26 Edit Organization

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Organization"  You will see the list of organizations. |  |
| 3 | **CHECK** the box at the left to the organization that you want to edit.  You can check only one organization. |  |
| 4 | **CLICK** on the Edit button.  You can see more organizations by clicking on the Next button. |  |
| 5 | Edit Organization form will appear.  **EDIT** the desired information.  Fields with red asterick \* are mandatory to fill. |  |
| 6 | **CLICK** on the Save button.  If you do not want the changes to be saved, **CLICK** Exit button. |  |

# 27 Deactivate Dictionary

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Dictionary"  You will see the list of dictionary entries. |  |
| 3 | **CHECK** the box at the left to the organization that is active and you want to deactivate.  You can check multiple organizations. |  |
| 3 | **CLICK** on the Deactivate button.  You can see more organizations by clicking on the Next button.  You can see that the organization’s  corresponding ‘Is Active’ column will become **N** |  |

# 28 Edit Site Information

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** on "Site Information"  You will see catalog of site information. |  |
| 3 | **CHECK** the box at the left to the site information that you want to edit.  You can check only one. |  |
| 4 | **CLICK** on the Edit button. |  |
| 5 | Edit site information form will appear.  **EDIT** the desired information. |  |
| 6 | **CLICK** on the Save button.  If you do not want the changes to be saved, **CLICK** Exit button. |  |

# 29 Edit Order Entry Configuration

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
| 2 | **CLICK** on "Order Entry Configuration"  You will see catalog of order entry. |  |
| 3 | **CHECK** the box at the left to the order entry that you want to edit.  You can check only one. |  |
| 4 | **CLICK** on the Edit button.  **EDIT** the desired information.  Fields with red asterick \* are mandatory to fill. |  |
| 5 | Edit site information form will appear.  **EDIT** the desired information. |  |
| 6 | **CLICK** on the Save button.  If you do not want the changes to be saved, **CLICK** Exit button. |  |

# 30 Batch Test Reassignment and Cancelation

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
| 2 | **CLICK** on "Batch test reassignment and cancelation"  You will see the catalog. |  |
| 3 | **SELECT** the sample type from the dropdown list. |  |
| 4 | **SELECT** current test from the dropdown list.  **SELECT** current test from the dropdown list.  **SELECT** test from which it is to be replaced by. You can select multiple. If any test is selected by mistake, click ‘X’.  Fields with red asterick \* are mandatory to fill. |  |
| 5 | Check the boxes according to what is desired.  Click OK button. |  |
| 6 | Check the information that you have entered. If it is correct, select Accept button.  If the information is not correct, select Reject button. |  |
| 7 | Confirmation message appears on the screen. |  |

# 31 Edit Menu Configuration

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
| 2 | **CLICK** on "Menu Configuration"  You will see catalog of menu configuration. |  |
| 3 | **CHECK** the box at the left to the menu that you want to edit.  You can check only one. |  |
| 4 | **CLICK** on the Edit button. |  |
| 5 | Edit form will appear.  **EDIT** Value if desired. |  |
| 6 | **CLICK** on the Save button.  If you do not want the changes to be saved, **CLICK** Exit button. |  |

# 32 Edit Patient Entry Configuration

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
| 2 | **CLICK** on "Patient Entry Configuration"  You will see catalog of patient entry configuration. |  |
| 3 | **CHECK** the box at the left to the patient entry configuration that you want to edit.  You can check only one. |  |
| 4 | **CLICK** on the Edit button. |  |
| 5 | Edit form will appear.  **EDIT** Value if desired. |  |
| 6 | **CLICK** on the Save button.  If you do not want the changes to be saved, **CLICK** Exit button. |  |

# 33 Edit Result Entry Configuration

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
| 2 | **CLICK** on "Result Entry Configuration"  You will see catalog of result entry configuration. |  |
| 3 | **CHECK** the box at the left to the result entry configuration that you want to edit.  You can check only one. |  |
| 4 | **CLICK** on the Edit button. |  |
| 5 | Edit form will appear.  **EDIT** Value if desired. |  |
| 6 | **CLICK** on the Save button.  If you do not want the changes to be saved, **CLICK** Exit button. |  |

# 34 Edit Printed Reports Configuration

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
| 2 | **CLICK** on "Printed Reports Configuration"  You will see catalog of printed reports configuration. |  |
| 3 | **CHECK** the box at the left to the printed reports configuration that you want to edit.  You can check only one. |  |
| 4 | **CLICK** on the Edit button. |  |
| 5 | Edit form will appear.  **EDIT** the Value. |  |
| 6 | **CLICK** on the Save button.  If you do not want the changes to be saved, **CLICK** Exit button. |  |

# 35 Edit Workplan Configuration

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
| 2 | **CLICK** on "Workplan Configuration"  You will see catalog of workplan configuration. |  |
| 3 | **CHECK** the box at the left to the workplan configuration that you want to edit.  You can check only one. |  |
| 4 | **CLICK** on the Edit button. |  |
| 5 | Edit form will appear.  **EDIT** the Value. |  |
| 6 | **CLICK** on the Save button.  If you do not want the changes to be saved, **CLICK** Exit button. |  |

# 36 Edit Non-Conformity Configuration

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
| 2 | **CLICK** on "Non-Conformity Configuration"  You will see catalog of non-conformity configuration. |  |
| 3 | **CHECK** the box at the left to the non-conformity configuration that you want to edit.  You can check only one. |  |
| 4 | **CLICK** on the Edit button. |  |
| 5 | Edit form will appear.  **EDIT** the Value. |  |
| 6 | **CLICK** on the Save button.  If you do not want the changes to be saved, **CLICK** Exit button. |  |

# 37 Barcode Configuration

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
| 2 | **CLICK** on "Barcode Configuration"  You will see three sections :   * Number Bar Code Label * Bar Code Label Elements * Dimensions Bar Code Label |  |
| 3 | In the section "number bar code", indicate the maximum number of bar code labels that can be printed for each order or specimen. Once the maximum has been reached, a user will be unable to print additional labels. |  |
| 4 | In the section "Bar Code Label Elements", check the box next to the optional elements that should appear on the order and sample bar code labels. |  |
| 5 | In the section "Dimensions Bar Code Label", indicate the dimensions that bar code labels should conform to when printing. |  |
| 6 | **CLICK** on the Save button.  If you do not want the changes to be saved, **CLICK** Cancel button. |  |

# 38 Data Submission

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| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
| 2 | **CLICK** on "Data Submission" |  |
| 3 | You will see Data Submission form.  **CLICK** on Edit button. Enter Data Submission URL. |  |
| 4 | **SELECT** report date (month and year). **CLICK** on Fetch Date button. |  |
| 5 | **CHECK** Send Indicator box. Turnaround Time which is the difference of days between date of report generation date and interview date. |  |
| 6 | **CHECK** Send Indicator box. VL Coverage which is the count of suppressed and unsuppresed divided by a reference (totalartmar). |  |
| 7 | **CHECK** Send Indicator box. VL Outcomes which is the additional values surrounding VL. |  |
| 8 | **CHECK** Send Indicator box. Testing Trends is the number of tests done. |  |
| 9 | **CHECK** Send Indicator box. Testing trends by Gender is the number of tests done by each gender. |  |
| 10 | **CHECK** Send Indicator box. Age Trends is the number of tests done by age. |  |
| 11 | **CHECK** Send Indicator box. Justification is the number of tests done by reason. |  |
| 12 | **CHECK** Send Indicator box. Current suppression by Gender indicates the suppression by each gender. |  |
| 13 | **CHECK** Send Indicator box. Current suppression by Age indicates the suppression by eachdf age. |  |
| 14 | **CLICK** on the Save and Submit button.  If you do not want to submit the changes, **CLICK** Save and Exit button. |  |

# 40 External Connections

|  |  |  |
| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
| 2 | **CLICK** on "External Connections"  **CLICK** on "Result Repoting Configuration" |  |
| 3 | Select the radio button to enable or disable the result reporting.  You do not need to enter URL if you selected Disable.  If you selected Enable, enter URL for site to which the results will be sent. Click Test URL button to test if the URL has been entered correctly. |  |
| 4 | Select the radio button to enable or disable Malaria Surveillance  You do not need to enter URL if you selected Disable.  If you selected Enable, enter URL for site to which the results will be sent. Click Test URL button to test if the URL has been entered correctly.  Reports are sent daily. Enter time when it is likely that there will be a good internet connection. |  |
| 5 | Select the radio button to enable or disable Malaria Case Report  You do not need to enter URL if you selected Disable.  If you selected Enable, enter URL for site to which the results will be sent. Click Test URL button to test if the URL has been entered correctly. |  |
| 6 | **CLICK** on the Save button.  If you do not want the changes to be saved, **CLICK** Cancel button. |  |

# 41 List Plugins

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| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
| 2 | **CLICK** on "List Plugins" |  |
| 3 | Catalog of Plugin Files will appear on the screen. |  |

# 42 Add System User

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| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** "Manage Users" |  |
| 3 | You can see more System Users by clicking on the Next button.  **CLICK** on the Add button. |  |
| 4 | Add User form will appear.  **ENTER**  Login Name, Password, First Name, Last Name.  **ENTER** Password Expired Date, User Time Out in minutes.  **SELECT** Y or N radio buttons for :  Account Locked  Account Disabled  Is Active  Fields with red asterick \* are mandatory to fill. |  |
| 5 | **SELECT** the checkboxes for the roles that can be performed using that account. |  |
| 6 | **CLICK** on the Save button.  If you do not want the changes to be saved, **CLICK** Exit button. |  |

# 43 Edit Dictionary

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| --- | --- | --- |
| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** "Manage Users" |  |
| 4 | **CHECK** the box at the left to the System User that you want to edit.  You can check only one system user. |  |
| 5 | **CLICK** on the Edit button.  You can see more users by clicking on the Next button. |  |
| 6 | Edit User form will appear.  **EDIT** the desired information.  Fields with red asterick \* are mandatory to fill. |  |
| 7 | **CLICK** on the Save button.  If you do not want the changes to be saved, **CLICK** Exit button. |  |

**44 Deactivate Dictionary**

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| **STEP** | **ACTION** | |
| 1 | **CLICK** the tab "Admin" in the navigation bar on the home page. |  |
|  |
| 2 | **CLICK** "Manage Users"  You will see the list of dictionary entries. |  |
| 3 | **CHECK** the box at the left to the users that you want to deactivate.  You can check multiple users. |  |
| 4 | **CLICK** on the Deactivate button.  You can see more users by clicking on the Next button.  You can see that the corresponding Is Active column will become **N** |  |