Assignment of Duty Policy for Tracking Pending Lab and Imaging results

Policy Date: 4/1/17

It is the policy of Practice Nameto manage the ordering and follow-up of all Lab and Diagnostic Imaging as follows:

**Ordering Workflow:**

1. Create an order for the lab or imaging test in Practice EMR.
2. For imaging and lab orders, a new row is added to the external “DI Order Tracking Chart,” and “Lab Order Tracking Chart” in order to better track and follow up on imaging orders.
3. On a daily basis, staff monitors these logs.
4. For any overdue orders, staff or provider follows up with patient and/or facility, as described in the general office policy. Any lab or image, which is more than 7 days past the appointment date, are considered by the practice to be overdue.
5. For labs, **all** results are automatically stored into the patient record; no intervention is needed from staff. For imaging, staff logs into the imaging center’s database and **all** result documents go directly into the patient record immediately upon receipt.
6. Upon receipt of any lab or imaging result, and after consultation with the provider, the front desk staff will create a telephone encounter, notifying the patient of such results. In the case of abnormal results, the telephone encounter is handled by the provider.

**Flagging Workflow:**

1. For labs, the EMR Practice EMR results are automatically pushed to the provider secure messaging inbox, and abnormal results are automatically marked as ABN.
2. For imaging the provider adds a row the “DI Order Tracking Chart” and manually marks “YES” or “NO” under the “ABN?” column, depending on whether the imaging result is abnormal or not, respectively. The provider will review the results and handle this flagging.

**Notifying Workflow:**

1. **Phone Call** - Use the Telephone Encounter feature in MSG/Activity tab or the notes field on the result to document communication, or the “Create Follow Up” feature within the lab result.
2. **Patient Portal** – Use the Secure Messaging system to send a message to the Patient Portal, or use the “Create Follow Up” feature within the lab result and check off “Send a message to Patient Portal”.
3. **Lab Letters** - Use the print feature within the lab result and mail document.

**Setup*:***

The practice has an established bi-directional interface with lab test facilities. Also, the practice uses an electronic system to order and retrieve labs.