Lab Management System - Standard Operating Procedure (SOP)

Effective Date: January 22, 2026

Department: Clinical Operations - Men's Health & Primary Care

Purpose: Comprehensive lab ordering, result review, and patient management procedures

■ OVERVIEW

The GMH Lab System integrates with **Access Medical Labs** to provide:

• **Lab Ordering**: Submit lab orders directly from the dashboard

• **Result Retrieval**: Automatic fetching of completed lab results every 30 minutes

• **Provider Review**: Queue system for providers to review and approve results

• **Patient Portal**: Approved results automatically visible in Healthie patient portal

System Components

Component	Location	Purpose
Lab Dashboard	`nowoptimal.com/ops/labs/`	Central hub for all lab operations
Order Modal	Dashboard → "Order Lab" button	Create new lab orders
Review Queue	Dashboard → "Review Queue" tab	Pending results for provider review
Orders Tab	Dashboard → "Order Labs" tab	Track submitted orders

■ CLINIC & PROVIDER ASSIGNMENT

Clinic Selection Rules

Clinic	Client ID	Default Provider	Provider NPI

Tri-City Men's Health	22937	Dr. Whitten	1366037806
NOW Primary Care	72152	Phil Schafer NP	1790276608

> ■■ **IMPORTANT**: When ordering labs, the provider is automatically assigned based on the selected clinic. Do NOT manually override unless specifically instructed.

■ ORDERING LABS

Step 1: Access the Order Modal

1. Navigate to `nowoptimal.com/ops/labs/`

2. Click the **"+ Order Lab"** button in the top right

3. The Order Lab Modal will open

Step 2: Select Clinic & Patient

1. **Clinic Selection**:

   • Select **Tri-City Men's Health** for TRT/Hormone patients
   • Select **NOW Primary Care** for primary care/weight loss patients

2. **Patient Selection**:

   • **Existing Patient**: Type the patient name to search, select from dropdown
   • **New Patient**: Click "New Patient" tab and fill in demographics manually

Step 3: Select Lab Tests

Category	Test Code	Description
Core Panels		
Male Pre-Treatment	9757	Initial hormone workup
Male Post-Treatment	9761	Follow-up hormone panel
Female Pre-Treatment	9765	Female hormone baseline
Female Post-Treatment	9760	Female hormone follow-up
Add-Ons		
PSA	146	Prostate screening

Restricted (Requires Approval)		
Lipid Panel	L509	Cholesterol/Lipid profile
A1C	202	Diabetes screening
Custom	varies	Any non-standard test code

Step 4: Submit Order

1. Review all information

2. Click **"Submit Order"** (or "Request Approval" for restricted tests)

3. Order is sent to Access Medical Labs

4. Order appears in "Orders" tab with status

Order Statuses

Status	Meaning	Action Required
`pending`	Waiting in queue	None - will auto-submit
`pending_approval`	Restricted test - needs admin	Admin must approve
`submitted`	Sent to Access Labs	Patient can go in for draw
`failed`	Submission error	Review error, re-submit

■ REVIEWING LAB RESULTS

Automatic Result Fetching

- Results are automatically fetched from Access Labs **every 30 minutes**
- When results arrive, they appear in the **Review Queue**
- Critical values trigger **Google Chat alerts** and **Telegram notifications**

Provider Review Workflow

1. **Navigate to Review Queue**

   - Go to `nowoptimal.com/ops/labs/`
   - Default view shows pending review items

2. **Review Each Result**

   - Click **"■ View Results"** to open the PDF

- Review all values, flag critical findings

3. **Patient Matching**

- System auto-matches patients with ≥80% confidence
- Low-confidence matches show a warning
- If unmatched, click and search for correct patient

4. **Approve or Reject**

- ✓ **Approve**: Result is uploaded to Healthie and made visible to patient
- ✗ **Reject**: Result is archived with reason (requires note)

Critical Value Alerts

These values trigger immediate alerts:

Test	Critical Low	Critical High	Alert Method
Testosterone (Total)	< 200	> 1500	Telegram + Google Chat
PSA	-	> 4.0	Telegram + Google Chat
Hematocrit	< 35%	> 54%	Telegram + Google Chat
Hemoglobin	< 10	> 18	Telegram + Google Chat

■■■■ PATIENT LAB HISTORY

Viewing Patient Lab History

1. Go to **Patients** page (`nowoptimal.com/ops/patients/`)

2. Find patient in list

3. Review **Last Lab** and **Next Lab** columns

4. Click patient to see full history

Lab Status Indicators

Status	Color	Meaning
■ Current	Green	Labs within expected range
■ Due	Yellow	Labs needed within 30 days

■ Overdue	Red	Labs past due date
■ Unknown	Gray	No lab history on file

Next Lab Due Calculation

- **TRT Patients**: Labs due every 6 months after stabilization
- **New Patients**: Follow-up at 6 weeks post-start
- **Weight Loss**: Quarterly metabolic panel

■ TROUBLESHOOTING

Order Not Appearing in Access Labs

1. **Check Order Status**: Go to Orders tab, find the order

2. **If "submitted"**: Order may take up to 24 hours to appear in Access Labs portal

3. **If "failed"**: Click to view error, correct issue, re-submit

4. **If blank/stuck**: Contact IT - may be API connectivity issue

Result Not Fetching

1. **Wait**: Results auto-fetch every 30 minutes

2. **Manual Fetch**: Run `python3 /home/ec2-user/scripts/labs/fetch_results.py`

3. **Check Logs**: `pm2 logs gmh-dashboard --lines 50`

Patient Not Matching

1. **Manual Match**: Click the unmatched result

2. **Search by Name**: Enter exact patient name from Healthie

3. **Select Correct Patient**: Click to link

4. **Complete Review**: Approve after linking

"Submitted" But No Confirmation

- Access Labs API returns empty 200 response on success
- This is NORMAL - verify in Access Labs portal
- If not appearing after 24 hours, contact Access Labs support

■ CONTACTS & SUPPORT

Issue	Contact
System Questions	IT/Aaron
Lab Results Questions	Provider on duty
Access Labs Portal	1-800-XXX-XXXX
Patient Matching	Front desk staff

■ RELATED DOCUMENTS

• [Patient Workflows](file:///home/ec2-user/gmhdashboard/docs/PATIENT_WORKFLOWS.md) - Clinical procedures by visit type

• [Staff Onboarding SOP](file:///home/ec2-user/gmhdashboard/docs/STAFF_ONBOARDING_SOP.md) - New staff checklist

• [Inventory Check SOP](file:///home/ec2-user/gmhdashboard/docs/SOP-Inventory-Check.md) - DEA compliance

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