

Lab Management System

Standard Operating Procedure (SOP)

Effective Date: February 17, 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
- **Automatic Lab Date Tracking:** NEW Pre Required lab dates auto-update on approval

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
Patient Detail	Patients  Click patient	View Last Lab, Next Lab, and Lab Status

CLINIC & PROVIDER ASSIGNMENT

Clinic Selection Rules:

Clinic	Client ID	Default Provider	Provider NPI
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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/Men's Health 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

ACTIVE PATIENTS ONLY: NEW The patient search only returns **active** Healthie patients. Archived/inactive patients will not appear in search results. If you cannot find a patient, verify they are not archived in Healthie.

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)

ARCHIVED PATIENT PROTECTION:  The system will **block** lab uploads to archived/inactive Healthie patients. If you attempt to approve a lab for an archived patient, you will see an error: *"Cannot upload to archived patient: [Name]. Please select an active patient instead."* Use the patient search to find the correct active patient record.

What Happens When You Approve a Pre Required Lab

When a lab containing **Male Pre Required** or **Female Pre Required** tests is approved, the system automatically:

1. Uploads the lab result to the patient's Healthie portal
2. Sets **Last Lab Date** = collection date of the lab
3. Sets **Next Lab Date** = collection date + 1 year
4. Updates **Lab Status** on the patient record (Current / Due Soon / Overdue)

NOTE: Only **Pre Required** labs update the patient's lab dates. Post-treatment labs, PSA, Lipid Panels, and other tests do **NOT** change the Last Lab / Next Lab dates.

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 & TRACKING

Viewing Patient Lab Information

1. Go to **Patients** page (nowoptimal.com/ops/patients/)
2. Find patient in list — the table shows **Last Lab** and **Next Lab** columns
3. Click patient to see full detail page

Patient Detail Page

The patient detail page now displays dedicated lab information cards:

Card	Shows	Description
Last Lab	Date of last Pre Required lab	Automatically set when a Pre Required lab is approved
Next Lab	Date of next lab due	Last Lab Date + 1 year, color-coded by urgency
Lab Status	Current status text	Calculated from Next Lab date

Lab Status Indicators & Color Coding

Status	Color	Meaning
Current	Green	Next lab is > 30 days away
Due Soon	Yellow	Next lab is within 30 days
Overdue	Red	Next lab date has passed
No Data	Gray	No lab history on file

Automatic Lab Date Updates

Lab dates are managed automatically — **no manual entry needed:**

Event	What Happens
Pre Required lab approved	Last Lab = collection date, Next Lab = +1 year

Post-treatment lab approved	No date change (Post labs don't reset the schedule)
Patient not found by Healthie ID	System falls back to name match, auto-links Healthie ID

WHERE LAB DATES APPEAR: Lab dates are visible in three places:

1. **Patients list** — Last Lab / Next Lab columns
2. **Patient detail page** — Dedicated lab cards
3. **NOW Optimal mobile app** — Patients can see their lab status

GHL Integration

When a patient's labs become overdue, GHL sync automatically applies the tag `has_labs_overdue`. If you have GHL automations configured on this tag (e.g., reminder workflows), they will trigger automatically.

NOTE: There is currently **no automated messaging** to patients about lab due dates. The system tracks and displays the data, but does not send push notifications or text messages. Any patient communication about labs must be done manually.

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

Results 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

"Cannot Upload to Archived Patient" Error NEW

If you see this error when approving a lab:

1. The matched patient is **archived/inactive** in Healthie
2. Click "Approve" again — the patient selection modal will open
3. Search for the patient's name — only **active** patients are shown
4. Select the correct active patient and approve
5. If no active patient is found, the patient may need to be reactivated in Healthie first

Lab Dates Not Updating After Approval

Lab dates only auto-update for **Pre Required** tests. If dates didn't update:

1. Check if the lab contains **MALE PRE REQUIRED** or **FEMALE PRE REQUIRED** in tests
2. Post-treatment labs, PSA-only, Lipid Panels, etc. do **not** trigger date updates

3. If the patient has no `healthie_client_id` , the system tries a name match — verify the name matches exactly

"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 Support	1-800-XXX-XXXX
Urgent Patient Issues	Telegram Ops Channel

RELATED DOCUMENTS

- **Patient Workflows** — Clinical procedures by visit type
- **Staff Onboarding SOP** — New staff checklist
- **Inventory Check SOP** — DEA compliance

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