ASCEND

LabCheck™

Version 5

Quick Reference Guide

800.800.5655 Option 1

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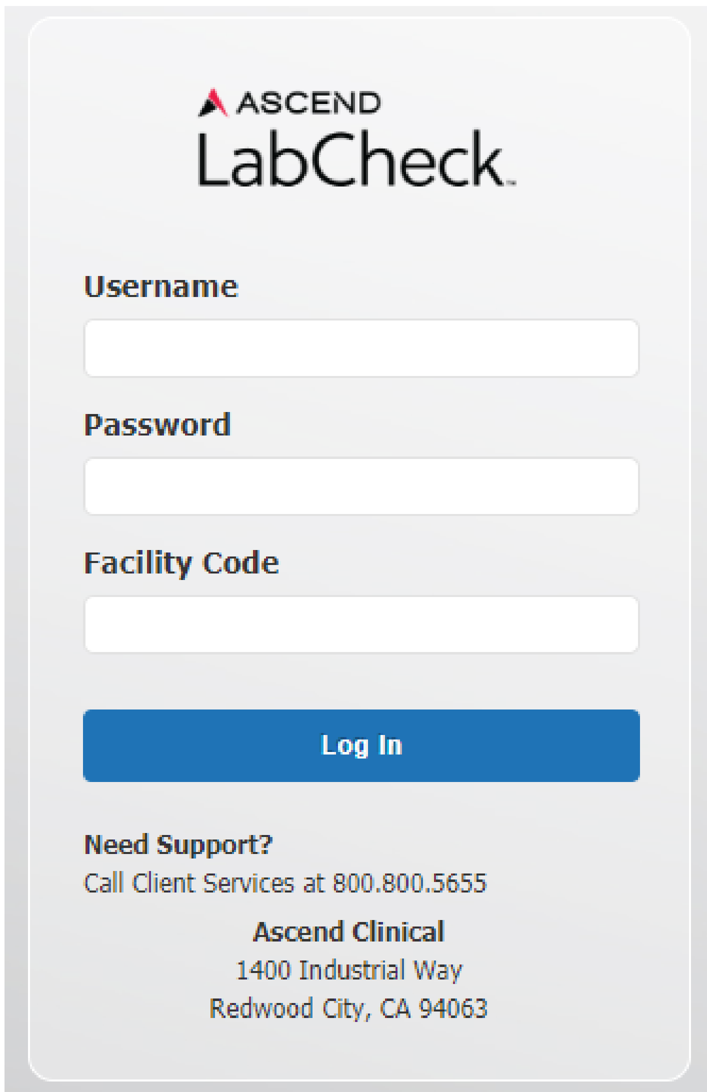
SYSTEM REQUIREMENTS

LabCheck 5 is a web-based application requiring a computer running a modern browser.

LabCheck 5 is designed to be standards-compliant and works best with the following operating-systems and browser versions: Windows 7 or later, Apple OS 10 or later, Internet Explorer 10 or later, modern Chrome, modern Firefox, and Safari (for OS X) 10.7 or later.



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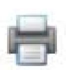
PATIENTS: ADD A NEW PATIENT

1. From **Patients** menu, select **Patient List**
2. Click **New Patient**
3. Enter Last Name. Click **Check Existing Patient**
4. If no matching patients are found, click **Create New Patient**

   Note: If patient match occurs, follow instructions noted under **READMIT A PATIENT OR ADMIT A TRANSFERRED PATIENT** to readmit patient.

5. Enter patient's demographic information in all bold face* fields. When complete, click **Save**
6. Click **Assignment of Benefits Form**

   Note: AOBs are required on all new patients. Please fax completed form and copy of insurance cards to Accounts Receivable.

7. Click **Open**
8. Click 
9. Click X in the upper right corner to close the AOB window.
10. To add the patient schedule now, click **Add a New Schedule**

    Note: Follow instructions noted under **ENTER A PATIENT'S HEMO SCHEDULE**.

11. To add the schedule later, from **Patients** menu, select **Patient List** return to the patient list.
    You are now able to select this patient to enter additional demographic, order and schedule information.

PATIENTS: READMIT A PATIENT OR ADMIT A TRANSFERRED PATIENT

1. From **Patients** menu, select **Patient List**
2. Click **New Patient**
3. Enter Last Name. Click **Check Existing Patient**
4. Click **Reactivate** to reactivate/transfer an existing patient.
5. Enter Start Date.
6. Click **Save**
7. Status of patient changes from Inactive to Active. Click **View** to confirm demographic information is accurate. Edit as needed.
8. Confirm Nephrologist and Modality. Edit as needed.

   Note: Remember to enter Patient Schedule and Orders.

PATIENTS: ENTER A PATIENT'S HEMO SCHEDULE

1. From **Patients** menu, select **Patient List**
2. Find patient from the alphabetical list by entering first or last name in the Search field and click **Apply**
3. Click patient name.
4. Click **Schedule**
5. Click **New Schedule**
6. Choose Start Date on calendar, otherwise it defaults to current date.
7. Check the box to the left of the Treatment Days.
8. Select the shift on the right side of each day.
9. Click **Save**

PATIENTS: EDIT A PATIENT'S HEMO SCHEDULE

1. From **Patients** menu, select **Hemo Schedule**
2. Find patient from the alphabetical list by entering first or last name in the Search field and click **Apply**
3. Click patient name.
4. Click **Edit**
5. Choose Start Date on calendar, otherwise it defaults to current date.
6. Check or uncheck the box to the left of the Treatment Days.
7. Select the shift on the right side of each day.
8. Click **Save**

PATIENTS: ADD A ONE TIME PATIENT HEMO SCHEDULE

1. From **Patients** menu, select **Hemo Schedule**
2. Find patient from the alphabetical list by entering first or last name in the Search field and click **Apply**
3. Click (+) under the appropriate date.
4. Select the shift from drop-down menu.
   Note: Check “Print Labels” box to quickly print labels for tests with Not Yet Submitted or Rescheduled status.
5. Click **Save**

PATIENTS: ADD TEST SET FOR A NEW PATIENT

1. From **Patients** menu, select **Patient List**
2. Find patient from the alphabetical list by entering first or last name in the Search field and click **Apply**
3. Click patient name.
4. Click **Order**
5. Click **Add Test Set**

   Note: Test Sets should only be entered once on new patients.
6. Select the Test Set from drop-down menu.
7. Review the selected defaults for Start Date, Ordering Physician, Order Date, Schedule, ICD and ESRD Related.

   Note: An End Date should not be entered, allowing tests to automatically populate on their scheduled frequency.
8. For those tests that contain components, select additional ICDs for those non-bundled tests. For each test, click inside the ICD box to either select a code from the existing list or type a new code or diagnosis in the box.
9. To exclude a test that is part of the Test Set, uncheck the Include box.
10. Click **Save**
11. A message box appears in the upper left: “The order has been successfully saved.”

PATIENTS: ADD INDIVIDUAL TESTS

1. From **Patients** menu, select **Patient List**
2. Find patient from the alphabetical list by entering first or last name in the Search field and click **Apply**
3. Click patient name.
4. Click **Orders**
5. Click **Add Test**
6. Select the test from the alphabetical list that displays drop-down menu.

   Note: Click to view additional test information.
7. Click inside the ICD box to either select a code from the existing list or type a new code or diagnosis in the box.
8. Select ESRD Related Yes No

   Note: If the test ordered is not related to the patient's dialysis treatment, select No. If the test ordered is related to the patient's dialysis treatment, select Yes.
9. Enter Specimen Source, if applicable.
10. Enter Details (optional).
11. Click Start Date field to edit Start Date, otherwise it defaults to current date. End Date is required only if using "One Time Only" schedule frequency.
12. Select frequency from Schedule drop-down menu (e.g. Monthly, Weekly, Quarterly).
13. Enter Notes (optional).
14. Edit or Confirm Ordering Physician and Order Date.
15. Click **Save**
16. A message box appears in the upper left: "The order has been successfully saved."

PATIENTS: ADD ORDER TO MULTIPLE PATIENTS (BATCH ORDERS)

1. From **Patients** menu, select **Batch Orders**
2. Select Nephrologist from drop-down menu, otherwise it defaults to All.
3. Select Modality from drop-down list, otherwise it defaults to Hemodialysis.
4. Select one or more Patients or click **Select All**
5. Select test from drop-down menu.
6. Enter Details (optional).
7. Click Start Date field to edit Start Date, otherwise it defaults to current date. End Date is required only if using "One Time Only" schedule frequency.
8. Select frequency from Schedule drop-down menu (e.g. Monthly, Weekly, Quarterly).
9. Enter Notes (optional).
10. Click **Next**
11. Review the test summary and patients selected for accuracy.
12. Edit ordering physician and order date, otherwise it defaults to patient's nephrologist and current date.
13. Click inside the ICD box to either select a code from the existing list or type a new code or diagnosis in the box.
14. Select ESRD Related ○ Yes ◉ No
15. Click **Save**
16. Screen will refresh.

PATIENTS: STOP ORDERS

Active orders can be stopped by applying an end date. This action will discontinue the order from appearing on the label screen.

1. From **Patients** menu, select **Patient List**
2. Find patient from the alphabetical list by entering first or last name in the Search field and click **Apply**
3. Click patient name.
4. Click **Orders**
5. Check box to the left of the Test.
6. Click **Stop Orders**
7. Select End Date from calendar, otherwise it defaults to current date.
8. Click **Save**

PATIENTS: PRINT BAR CODE LABELS FOR A COLLECTION DATE

A Bar Code Label is the requisition for the tests ordered and shipped to the lab. All specimens are required to be appropriately labeled. Ascend Clinical will not process any specimen that is unlabeled.

1. From **Patients** menu, select **Hemo Labels** or **PD Labels**
2. Click Collection Date field to edit Collection Date, otherwise it defaults to current date.
3. Select Shift to print a selected shift, otherwise it defaults to All Shifts.
4. Select one or more patients or Click **Select All**
5. Click **Find Labels For Selected Patients**

   Note: Click ▶ to the left of each patient to reveal order details.
6. Click **Print/Save**
7. Screen will refresh. Status will change from All Not Submitted to All Submitted. The labels will print in approximately one minute.

PATIENTS: REPRINT PRINTED BAR CODE LABELS

There may be instances where a user would need to reprint labels that have previously been printed. For example, the labels were misplaced once they were printed.

1. From **Patients** menu, select **Hemo Labels** or **PD Labels**
2. Click Collection Date field to edit Collection Date, otherwise it defaults to current date.
3. Select one or more patients or Click **Select All**
4. Click **Find Labels For Selected Patients**
5. Status of labels will read as All Submitted. Click ▶ to the left of each patient to reveal order details.
6. Check "Reprint All Submitted Labels" box.
7. Click **Print/Save**
8. Screen will refresh. The labels will print in approximately one minute.

PATIENTS: RESCHEDULE TESTS & PRINT LABELS

Rescheduling allows you to print labels for another scheduled treatment day within the test order frequency. For example, the patient didn't show as scheduled and labs are to be drawn the next scheduled treatment, therefore labels need to be reprinted with the updated collection date.

1. From **Patients** menu, select **Hemo Labels** or **PD Labels**
2. Click Collection Date field to edit Collection Date, otherwise it defaults to current date.
3. Select one or more patients or Click **Select All**
4. Click **Find Labels For Selected Patients**
5. To reschedule all submitted tests, click Reschedule All to the right of the Patient Name.
6. To reschedule an individual test, click ▶ to the left of the patient and click reschedule box to the right of the test name.
7. Click **Print/Save**
8. Screen will refresh. Status will change to Rescheduled or Various. The test has now been made available for the next scheduled treatment day.
9. Labels can now be printed. Follow instructions noted in **PRINT BAR CODE LABELS FOR A COLLECTION DATE.**

   Note: Remember to add patient to the schedule for draws occurring on a nonscheduled treatment day.

PATIENTS: CANCEL TESTS

Canceling a test eliminates the order for that test order frequency. The test will reappear on the next scheduled frequency. It does not end-date the original order. For example, physician wants to hold the test until next month. To stop a test permanently by adding an end-date, follow instructions noted in **Stop Orders**.

1. From **Patients** menu, select **Hemo Labels** or **PD Labels**
2. Click Collection Date field to edit Collection Date, otherwise it defaults to current date.
3. Select one or more patients or Click **Select All**
4. Click **Find Labels For Selected Patients**
5. To cancel all submitted tests, click Cancel All to the right of the Patient Name.
6. To cancel an individual test, click ▶ to the left of the patient and click cancel box to the right of the test name.
7. Click **Print/Save**
8. Screen will refresh. Status will change to Cancelled or Various. The tests have now been cancelled and will not be available again until the next scheduled frequency.

PATIENTS: DRAW INFORMATION ENTRY

Draw Information is needed for the lab to provide certain calculated results. For example, Kt/V Natural Log and PD Adequacy. The required draw information will be displayed with entry fields for the user to enter and submit.

1. From **Patients** menu, select **Draw Info Entry**
2. Find collection date and click **Edit** on the right side of screen.
3. Enter appropriate data into Draw Information field.
4. Click **Save**

PATIENTS: VIEW, PRINT or FAX INDIVIDUAL PATIENT RESULTS

1. From **Patients** menu, select **Patient List**
2. Find patient from the alphabetical list by entering first or last name in the Search field and click **Apply**
3. Click patient name.
4. Click **Results** to display lab results from the past three months.
   Note: Select the MICRO RESULTS tab to display micro results from the past three months.
5. Check the box to the left of the Collected date.
6. Click **Print Lab Copy** to print results directly to your designated lab printer.
7. A message box appears in the upper left: "Your request for Lab Report will print shortly to the LAB PRINTER."
8. Click **Print Web Copy** to print results to any local printer.
9. Click **Open** to view results.
10. Click  to print results to a local printer.
11. Click **Fax Web Copy** to fax results to selected destination.
12. Select Staff/Location/Facility contact from drop-down menu.
13. Enter Cover Sheet Message.
14. Click **Send**

PATIENTS: VIEW, PRINT or FAX MULTIPLE PATIENT RESULTS (LAB, MICRO, SENSITIVE)

1. From **Patients** menu, select **Patient Results**
2. Click Patient Lab Results.

   Note: For micro results, click Patient Micro Results. For sensitive results, click Sensitive Patient Lab Results.
3. Edit report filters and click **Search**
4. To view individual results, click ▶ to the left of each patient collected date.
5. To print, check the box to the left of the Collected date.

   Note: Check "Select All" box to choose all patients and collection dates.
6. Click **Print Lab Copy** to print results directly to your designated lab printer.
7. A message box appears in the upper left: "Your request for Lab Report will print shortly to the LAB PRINTER."
8. Click **Print Web Copy** to print results to any local printer.
9. Click **Open** to view results.
10. Click to print to a local printer.
11. Click **Fax Web Copy** to fax results to selected destination.
12. Select Staff/Location/Facility contact from drop-down menu.
13. Enter Cover Sheet Message.
14. Click **Send**

CONFIGURATION: CREATING A SCHEDULED FAX or PRINTED REPORT

Users can create scheduled printed reports or routine faxes through Print Scheduler. When setting up a scheduled printed report or fax, first determine if a Custom Report is needed, second determine if a Patient Group is needed, third confirm the contact is available in the Contact List (faxes only), then proceed to build a Print Scheduler.

1. From **Configuration** menu, select **Print Scheduler**
2. Click **Add Schedule**
3. Select Report Type from drop down
   NOTE: Patient Inquiry Template is the patient's lab result report
4. Select Template from drop down, if applicable
5. Click **Next**
6. Select Report Criteria
7. Click **Next**
8. Select Reporting Frequency
   NOTE: Date Range selection should ensure it covers the days between faxes.
9. Click **Next**
10. Select Report Print Fax Option
    a. Print Report using SecurePrint will print the selected report to the lab designated printer
    b. Fax Report option allows you to select a contact from your contact list or contacts that have been shared by others
11. Enter Schedule Description
    a. The description is visible on the Print Scheduler screen offering a description of the type of print scheduler created
12. Click **Finish**

NOTE: Review the Print Scheduler/Fax Confirmation Report, located under General Reports, regularly to ensure printed reports and faxes were successfully sent

PATIENTS: ICD/ESRD CORRECTIONS

ICD/ESRD correction requests are routed to the Message Center when an insurance company denies services for not meeting medical necessity criteria or when the service is considered non-covered. Please review your requests on a regular basis, and provide updated ICD codes when appropriate. Requests will remain in the Message Center for 60 days. Requests not acted upon after 60 days will be billed on your facility invoice.

1. Click ICD/ESRD Corrections in Message Center.
2. Double click selected correction.
3. Enter the revised ICD for each test from the existing list or type a new code or diagnosis in the box.
4. Check the box “This change has been authorized by the ordering physician.”
5. If order is a standing order, check the box to the left of the test name to update the standing order.
6. Click Save
7. Screen will refresh.

ENVIRONMENTALS: ADD A NEW SOURCE

1. From **Environmentals** menu, select **Environmental Sources**
2. Click **New Source**
3. Select the Source Type from drop-down menu.
4. Enter Source Name.
5. Click **Save**
6. Screen will refresh. You are now able to select this source to enter orders.

ENVIRONMENTALS: ADD SOURCE ORDER

1. From **Enviromentals** menu, select **Environmental Sources**
2. Find source from the alphabetical list by entering source name in the Search field and click **Apply**
3. Click source name.
4. Click **Orders**
5. Click **Add Test**
6. Select test from drop-down menu.
7. Click in Start Date field and select date on calendar.
8. Select test frequency from Schedule drop-down menu.
9. Click **Save**

ENVIRONMENTALS: ADD ORDER TO MULTIPLE SOURCES (BATCH ORDERS)

1. From **Enviromentals** menu, select **Batch Orders**
2. Select Environmental Source Type from drop-down list.
3. Select one or more Source Names or click **Select All**
4. Select one or more tests or click **Select All**
5. Click in Start Date field and select date on calendar.
6. Select test frequency from Schedule drop-down menu.
7. Click **Save**
8. Screen will refresh.

ENVIRONMENTALS: PRINT LABELS

1. From **Enviromentals** menu, select **Labels**
2. Click Collection Date field to edit Collection Date, otherwise it defaults to current date.
3. Select Environmental Source Type, otherwise it defaults to All.
4. Select one or more Source Names or click **Select All**
5. Click **Find Labels For Selected Sources**

   Note: Click ▶ to the left of each source to reveal order details. Click **Print/Save**
6. Screen will refresh. Status will change from All Not Submitted to All Submitted. The labels will print in approximately one minute.

ENVIRONMENTALS: VIEW or PRINT SOURCE RESULTS

1. From **Enviromentals** menu, select **Results**
2. Select Environmental Source, otherwise it defaults to All.
3. Select Source Type, otherwise it defaults to All.
4. Select Start Date, otherwise it defaults to 1st of current month.
5. Select End Date, otherwise it defaults to current date.
6. Select source Status, otherwise it defaults to Active.
7. Click **Search**
8. Click ▶ to the left of each source collected date to view individual source results.
9. Check the box to the left of the Collected date for each selected source and collected date.
10. Click **Print Lab Copy** to print results directly to your designated lab printer.
11. A message box appears in the upper left: "Your request for Lab Report will print shortly to the LAB PRINTER."
12. Click **Print Web Copy** to any local printer.
13. Click **Open** to view results.
14. Click to print results to a local printer.

ENVIRONMENTALS: VIEW, PRINT or FAX ENVIRONMENTAL CQI REPORT

1. From **Results** menu, select **Environmental**
2. Click Environmental CQI Report.
3. Click Facilities field to select multiple facilities, otherwise it defaults to current facility.
4. Select Start Date, otherwise it defaults to 1st of current month.
5. Select End Date, otherwise it defaults to current date.
6. Click **Generate Report**
7. Click **Open** to view report.
8. Click  to print to a local printer.
9. Click **Send to Fax** fax results to selected destination.
10. Select Staff/Location/Facility contact from drop-down menu.
11. Enter Cover Sheet Message.
12. Click **Send**