Vision 3

Test Requesting in Vision

The Bread Factory, 1A Broughton Street, Battersea, London, SW8 3QJ
T: +44 (0) 207 5017000 F:+44 (0) 207 5017100 W: www.inps.co.uk

INPS Ltd.
The Bread Factory
1a Broughton Street
London
SW8 3QJ

Website: www.inps.co.uk

Table of Editions and Contents

Date	Version	Contents	Output
29/09/10	001	Draft	Docx
26/10/10	002	Review CSMI, NHAN and SHAS	Docx
26/10/10	003	Available providers added	Docx & PDF
24/05/11	004	tQuest log in with no patient selected added	PDF
11/07/11	005	of Cyberlab	PDF
13/07/11	006	Editing, Deleting, Reports and Password Changing added	PDF
13/07/11	007	Review HJOH	PDF
08/08/11	008	Recording Sample Taken added	PDF
07/09/11	009	Cyberlab added	PDF
18/04/12	010	Dart OCM added, guide updated to 2012 style	PDF
24/07/13	011	Plumtree added and style tweaked	PDF &HTML
21/01/2014	012	What's New added with DLM 460 details, Test Request button option added	PDF & HTML

Contents

Test Requesting in Vision

Introduction

Electronic test requesting provides an integrated link directly from the patient record in Consultation Manager to the laboratory system via a secure NHSNet connection. Vision is currently integrated with several requesting systems:

- tQuest
- Cyberlab
- Plumtree
- Technidata
- Dart OCM
- ICE

Note – ICE is **not** included in this user guide. Please refer to *ICE Test Requesting User Guide* (*http://www.inps4.co.uk/my_vision/vua/user-guides/clinical.html*).

The integrated test requesting functionality allows for:

- The request details to be recorded on the patient record.
- The request and/or specimen details to be updated after they have been sent.
- Immediate access to patient results.
- The ability to view outstanding requests.

Other benefits of integrated electronic test requesting:

- There is no longer a need to re-key/write out demographic data for each test request.
- There is a reduction in errors and mismatches when the result comes back.
- It reduces the need to chase results from the laboratory.
- There is an improvement in data quality as the patient record is more up-to-date.
- Reduction/cessation of ordering duplicate test requests.

Note - Your Hospital Trust is responsible for delivering your test requesting integration. Please liaise with them to arrange activation or with any queries regarding your Requesting System outside of the Vision software. On instruction from your test request software company, INPS remotely enables the software at your practice.

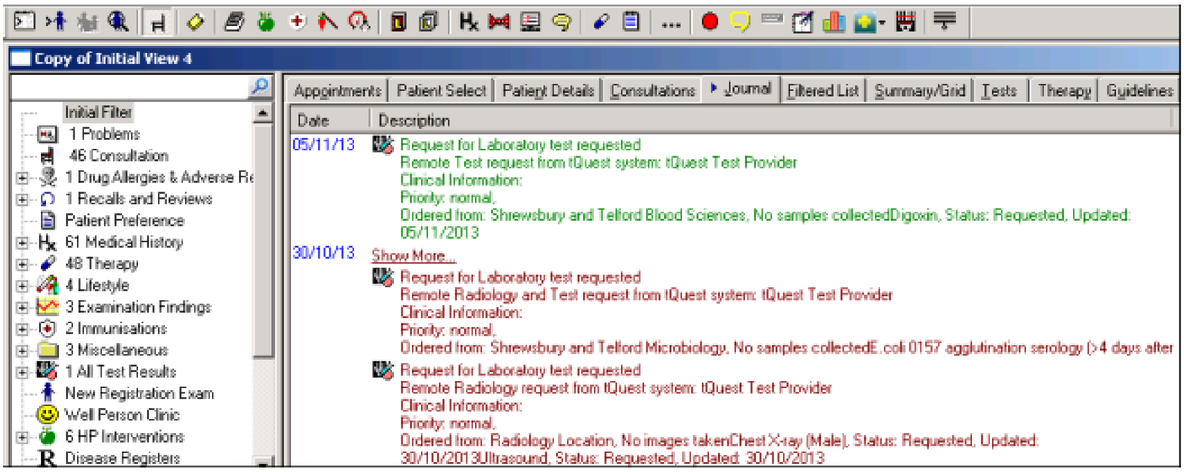
What's New?

DLM 460

- **Create Electronic Test Request** button added to the Consultation Manager toolbar .
- When you select a radiology test from your tQuest test request system it is now displayed as one of the following within Consultation Manager:

  – **Remote Radiology and Test request from tQuest system...** - which indicates a mixture of radiology and pathology tests.

  – **Remote Radiology request from tQuest system...** - which indicates a radiology request only.

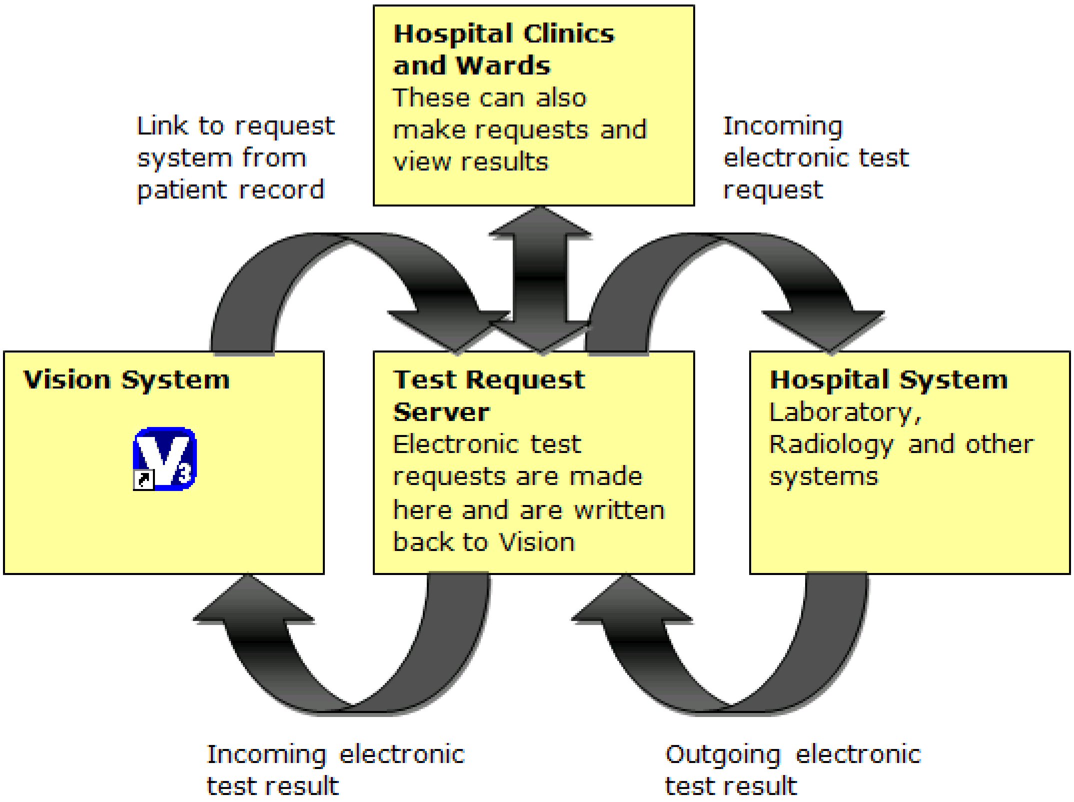


Example Radiology requests

Workflow Overview

The network and request workflow process for test requesting with Vision is as follows:

Network Workflow



Workflow between Vision, Test Server and Hospital

Request Workflow

- Go to **Add - Requests – Electronic Requests**. Then link to the test requesting interface.
- Make test request and print the details. Affix specimen to the printed request. **OR** Make the test request, but leave the sample collection details to be entered at a later date.
- The details are copied back to the request form in Vision and are saved to the Journal.

Setting Up

Switching On Test Requesting

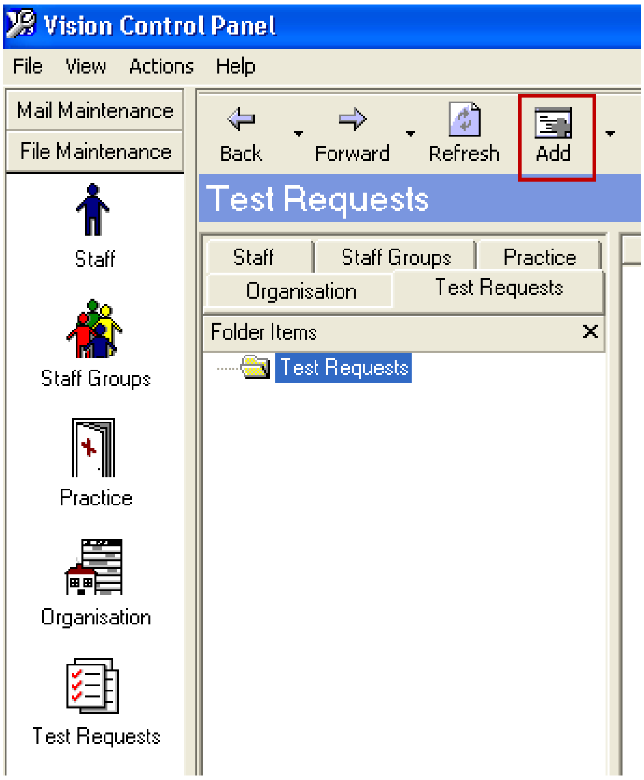
Your Hospital Trust is responsible for delivering your test requesting integration. Please liaise with them to arrange activation or with any queries regarding your Requesting System outside of the Vision software. On instruction from your test request software company, INPS remotely enables your software. Once this has been done, you need to:

- Add required provider(s) in **Control Panel - File Maintenance - Control Panel – Test Requests**.
- Make sure you have staff accounts details (provided by your trust).
- It is also advisable to liaise with your trust and provide them with a list of Clinicians and non-Clinicians who want to use the test request software before go live.

Adding Providers

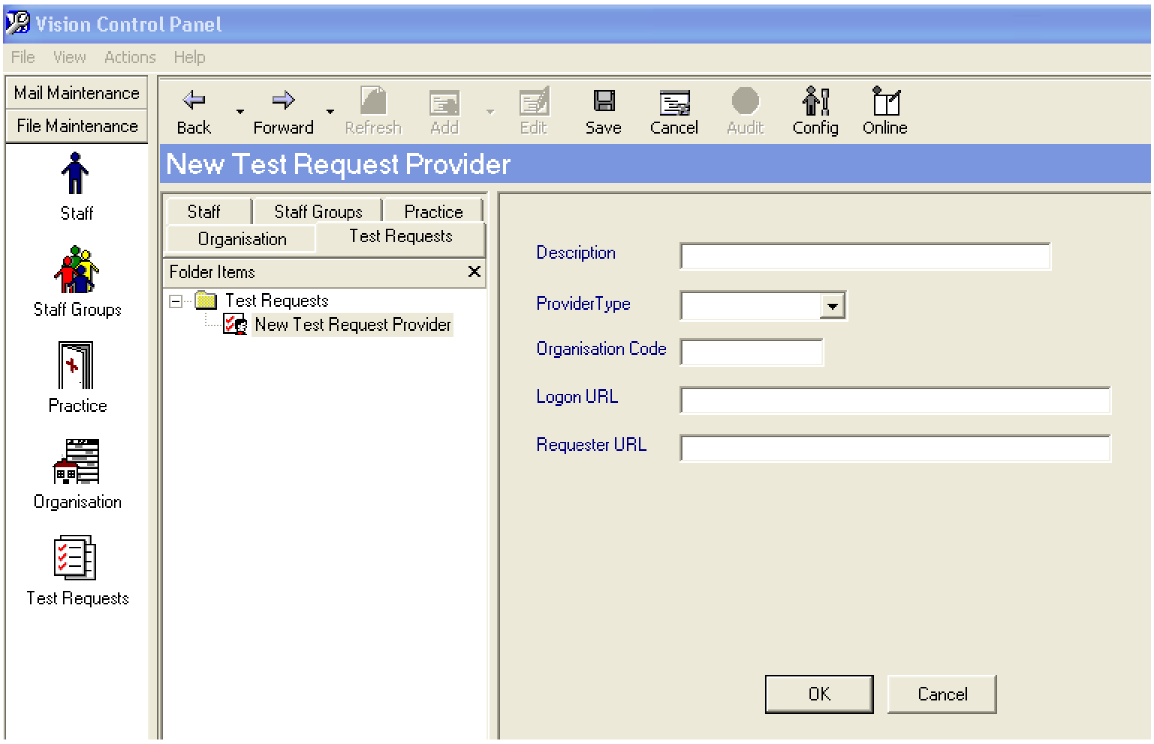
You need to add the provider(s) which you intend to use for electronic test requesting. This is done from **Test Requests** in **Control Panel**. You need the requestor URL, Provider Type and Organisation Code which is obtained from your trust.

1. From the Vision front screen, go to **Management Tools - Control Panel**.
2. Select **File Maintenance** and click on the **Test Requests** icon.
3. Click **Add**.



Test Request – Add

4. Complete the **New Test Request Provider** form:



New Test Request Provider form

- **Description** - Enter the name of the Provider.
- **Provider Type** – Select your test request provider from the pull down list.
- **Organisation Code** – This is provided by your trust.
- **Logon URL** – If this field is active, complete with the information provided by your Trust.
- **Requestor URL** – If this field is active, complete with the information provided by your Trust.

Note – Logon URL and Requester URL are not both active fields, it is dependent on the Provider Type selected above.

5. Click **OK**. The provider details are added to the list in the **Test Request** Pane in **Control Panel**.

Creating Electronic Test Requests

Electronic test requests are generated in Consultation Manager from the Electronic Requests form. From here, you can link to your test requesting system.

Some systems offer various scenarios which you can apply to electronic test requesting:

- Record the full request and sample collection details, (you would also follow this method if samples are collected by an external hospital phlebotomist, for example).
- Record the request only, i.e. the GP can add a request, and then practice nurse can collect the sample and update the request.
- Record the sample collection details for a previously generated request.

Other systems record the data as full request and sample collection details with no other choice.

All request and sample collection details are written back to the patient record. You can edit and view the requests and sample details at any time.

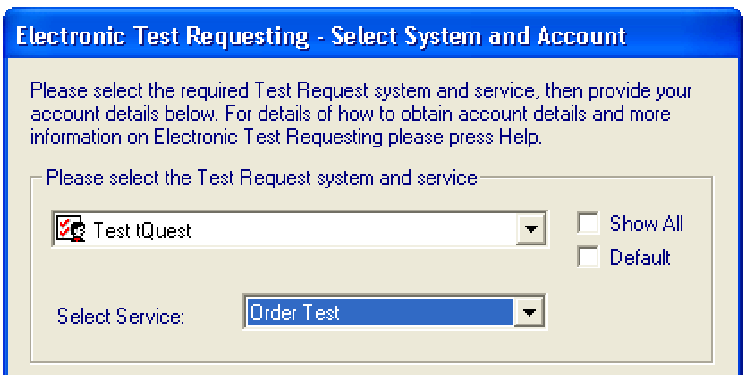
Recording a Test Request

Electronic test requests are generated in Consultation Manager from the Electronic Requests Form. From here you can link to your laboratory(s) test request system.

1. From **Consultation Manager**, select the patient and open a consultation.

> **Note** – For tQuest you can access this option without a patient being selected to view the Location Report List. This is a read only option, no changes can be made.

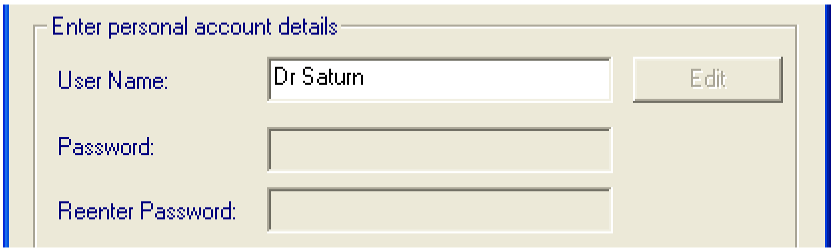
2. Select Create Electronic Test Request from the tool bar or go to **Add - Requests - Electronic Requests.**
3. At the **Electronic Test Requesting - Select System and Account** screen, select the request system and provider you would like to use:



Top of the Electronic Test Requesting – Select System and Account screen

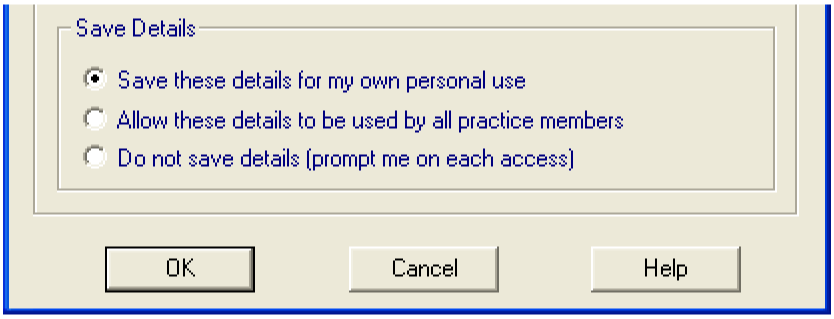
- **Test Request System and Service** – Select the required test request interface and provider.
- **Show All** – when ticked, this allows you to select from the full list of providers on your system.
- **Default** – when ticked keeps the current provider as the default option. This is a per user setting.
- **Select Service –** lists the possible services that your test request interface offers. This defaults to Order Test for new requests and Update Test when editing.

4. Now enter **User Name** and **Password** – When you first use laboratory(s) test request system, your Vision user name is populated in the Test Request **User Name** box. Click **Edit** and change this to the user name supplied by your Hospital Trust/Laboratory and then look at the save details options below. Use a password if provided. Where Passwords are not required the field is locked.



Enter personal account details

5. From **Save Details** you have three options for saving account details:



Save Details screen

Note - The first time you login, select **Do not save details**. This is because Vision immediately saves these details which, if incorrect, you have to reset from Control Panel. See *Resetting Test Requesting Passwords* (page 14).

- **Save these details for my own personal use** – Saves the user name and password to your Vision user account.
- **Allow these details to be used by all practice members** – This option is used to accommodate generic accounts.
- **Do not save details (Prompt me on each access)** – If you select this option, you have to enter the username details each time you want to access your test request interface.

6. You are now connected to your test request provider and have their interface displayed on your screen. This screen varies depending on your provider.

7. From the test request interface, you can choose:
    - To complete a request only, which allows you or, for example, the nurse, to record sample collection at a later date.
    - To complete a request and record sample collection at the same time.

Note - You can request multiple samples within one test request.

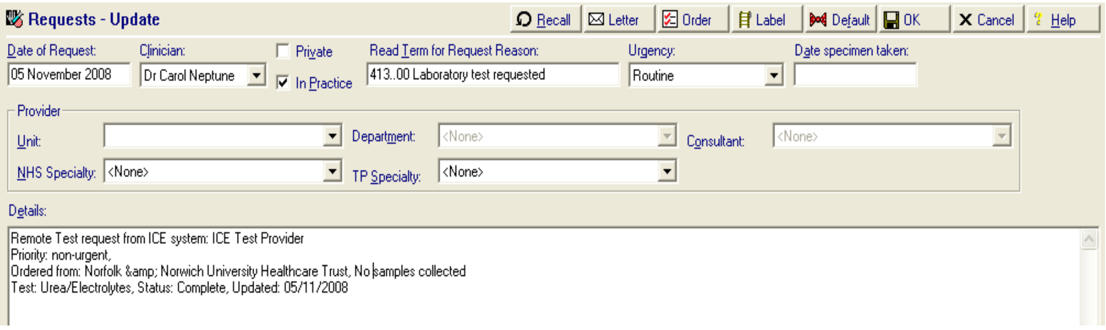
8. Once your request has been made, the window connecting you to your test request provider must be closed; this may happen automatically or may involve you closing it manually. You are now returned to **Consultation Manager - Request**.
9. You can see that the request has been recorded, for example, in the **Journal**. The following details are saved:
    - **Date of the request**
    - **Clinician**
    - **Read term for request** - All requests have the Read code 413..00 -Laboratory Test Requested, although you are able to manually change this Read code if required.
    - **Urgency**
    - **Other details** – This includes test request system, provider, sample description, sample status and date sample was updated. These are added to the details section of the Requests form.

Note - The Details box should not be edited manually, as any manual changes may be lost.

Editing a Test Request

You are able to edit requests that have already been made, for example, you might have forgotten to add specific notes to the request form.

1. Find the previous request from the navigation pane, for example, in the Journal or Medical History.
2. Right click on the request and select **Edit**.



Requests - Update

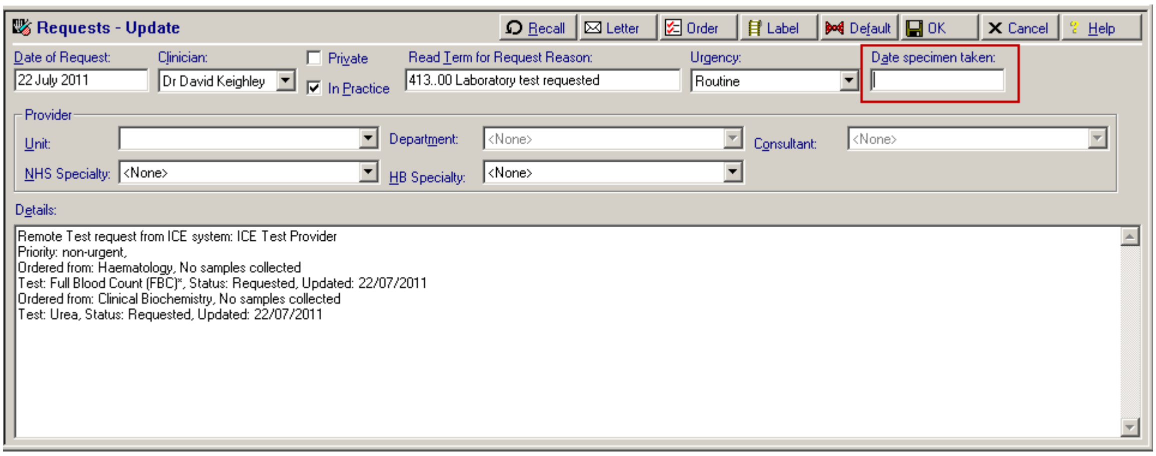
3. From the **Requests – Update** screen, click on the **Order** button.
4. Select the provider and fill in any login details if necessary. The **Select Service** defaults to **Update Test**. Click **OK**.
5. This opens the previously created request.

6. Once you have made your editions and exit the test request system, the details are saved back to the **Request – Update** form in Consultation Manager.

Recording a Sample as Collected

To record a sample as collected:

1. Find the request from the navigation pane, for example, in the Journal or Medical History.
2. Right click on the request and select **Edit**.
3. Enter the collection date in **Date Specimen Taken**.
4. Click **OK** to save and close.



Requests - Update

Deleting Electronic Test Requests

Once you have made a request, you can delete individual or all tests within a request. This must be done from the test request interface via the corresponding request form. The request form in Consultation Manager is updated to reflect any deletions made.

> **Note –** If you delete an entire request form in Consultation Manager this does **not** in turn delete the request from the test request interface.

If part of a request is deleted, the Journal entry is updated automatically to show a status of **Cancelled**. There is no need to delete the Journal entry.

If one test is cancelled in a multi-test request, the Journal entry is updated automatically to mark that specific test as cancelled. In this case, it is most important that the Journal entry should **not** be deleted.

Examples of cancelled requests

The above screenshot shows three test requests.

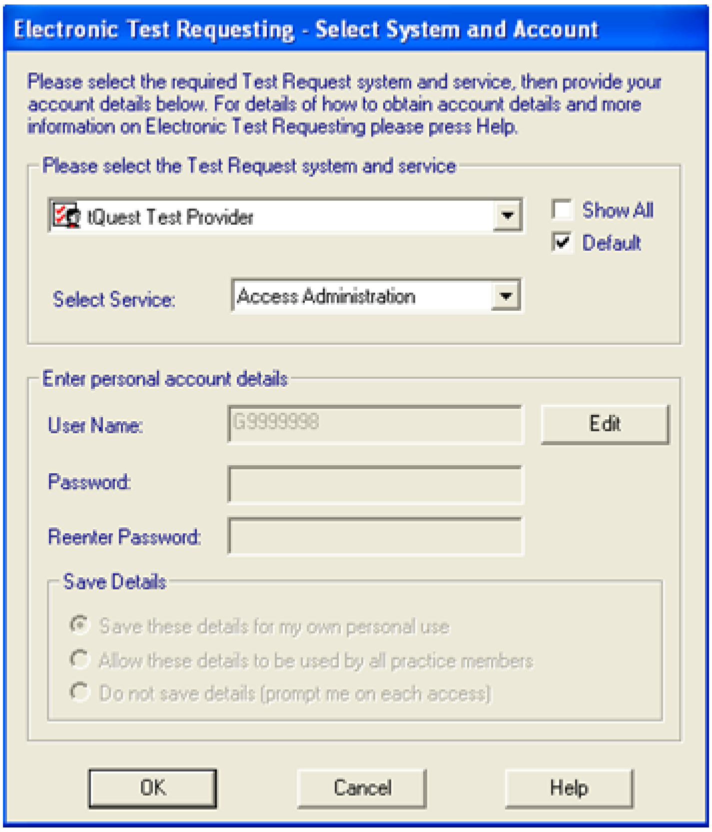
1. In the first request, the Albumin and ANA tests have been cancelled. This Journal entry must not be deleted because other tests (Ferritin and Iron) are still active.
2. The second request has been completely cancelled. Although this Journal entry could be deleted, it is advisable to leave it for audit purposes.
3. The third request consists of two orders (or samples). One of the orders has been cancelled. This Journal entry must not be deleted because the other order is still active.

Reports

Viewing Incomplete/Complete Reports

You can view a list of all completed and incomplete/pending requests for **all** patients from the Access Administration screen.

1. From Consultation Manager, go to **Add – Requests – Electronic Requests**. There is no need to have a patient selected.
2. From the **Select System and Account** screen, make sure the relevant provider is selected.
3. In the **Select Services** box, choose **Access Administration** and click **OK** to login to your test request provider.



View Incomplete Tests

4. Click **OK** to be directed to the relevant pages of your test request system.

Reprinting Requests

You can also reprint a request form for a completed request from the **Access Administration** Screen.

1. From Consultation Manager find the request you would like to reprint in the Navigation Pane from **Medical History - Requests**.
2. Right click on the request and select **Edit**.
3. Click on the Order button 

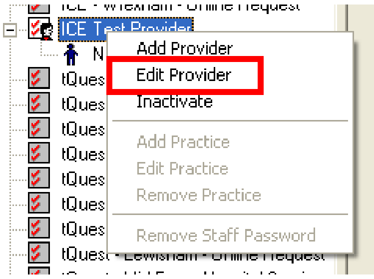
. The Select Services list displays **Access Administration**
4. Click **OK** to load the test requesting interface.
5. You are taken to the **Complete** tab in the test requesting administration screens, here you can see all completed requests for all patients. Locate the required request. You can double click on the request to see further information.
6. Once you have found the relevant request, click on the Reprint icon.
7. Press **Print** when prompted.
8. You are returned to the Request Update form in Consultation Manager. Click **OK** to close the Request-Update box.

Changing Provider Details

Editing Providers

If you need to change the details of a provider, i.e. if the provider changes their URL/logon ID:

1. From the Vision front screen, go to **Management Tools - Control Panel**.
2. Select **File Maintenance** and click on the Test Requests icon.
3. Right click on the provider you would like to change and select **Edit Provider**.



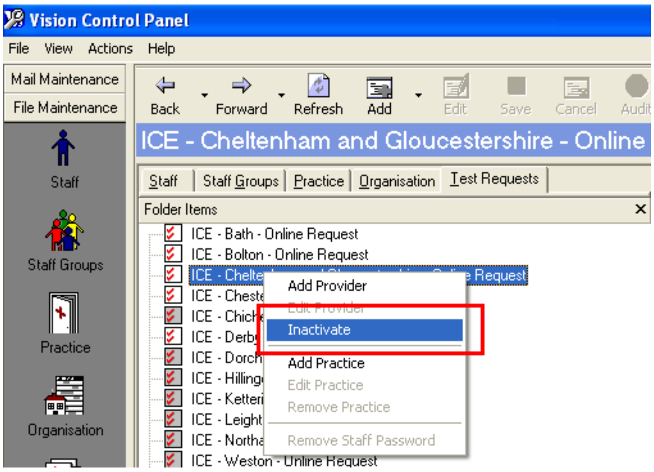
Test Provider - Edit Provider

4. On the Provider Form make the necessary changes, and click **OK** to save.

Inactivating Providers

To inactivate a provider:

1. From Control Panel - File Maintenance, select Test Requests.
2. Right click on the required provider and select Inactivate.



Inactivate Providers

The inactive provider remains in the list but displays a grey icon.

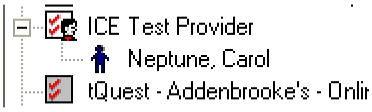
Inactive provider

Managing Test Requesting Login Details

Resetting Test Requesting Passwords

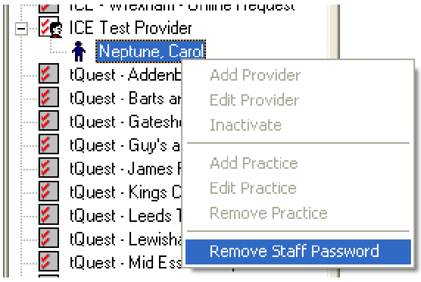
As new users login to test requesting, their password details are logged in **Control Panel – Test Requests**. You can reset a test request password from here, for instance, you might need to do this if a user has opted to save their password details on the Select System and Account screen in Consultation Manager, but has saved the wrong password details.

1. Go to **Management Tools - Control Panel**.
2. Select the **Test Requests** icon.
3. Click on the plus next to the provider for the failed login to view a list of the staff listed to use this provider.



List of staff

4. Right click on the failed login user, select **Remove Staff Password**.



Remove Staff Password

5. You can enter a new password when you next attempt to login to test requesting from Consultation Manager.

Index

A

C

D

E

I

M

N

R

S

T

V

W