

Epic Tip Sheet: Beaker

Add-on Labs for Inpatient and Ambulatory

Summary

When you order tests with Beaker, you have a few options. If you place multiple orders for different specimens, Beaker will automatically allow tests that can share containers to do so. This is based on container volume, container type, and lab section.

Specimens do not need to be received into to the lab to be eligible for add-on orders. They are eligible for add-on orders as soon as they are collected. When you order a test that can be shared with a specimen, follow the process below.

Add-on Lab Test

1. As a provider, you previously ordered a lab test, such as a PT/INR, and want to add on additional tests, such as a PTT.
 - Based on the collection time of the specimen and other criteria, you have a preset amount of time dependent on the orderable to add additional tests on to an existing specimen in the lab.



You will not see an option to use an existing specimen if the previous test is too old, the container type does not match, or the sample is not sufficient based on tube volume.

The screenshot shows the Epic Beaker interface for a Sodium test. The 'Add-on' field is highlighted with a red box, showing options: 'New Collection', 'Use Existing Specimen', and 'Specimen collected 5h ago on 5/5/23 331 a (Tests: CR)'. A red arrow points from the 'Add to specimen collected 5h ago?' message in the 'New Orders' panel to the 'Use Existing Specimen' option.

2. When you see the yellow “ Add to specimen collected X hours ago?” click to open the Order Composer details.
3. In the Add-on field, switch from New Collection to **Use Existing Specimen**.
4. **Sign** the order.
5. The lab will receive an In-Basket message with the add-on request.

The screenshot shows the Epic In-Basket message for a Sodium test. The message is titled 'New Orders' and contains the text: 'Sodium', 'Using an existing specimen', and 'ROUTINE, ONCE, today at 0834, For 1 occurrence, Use existing specimen'. The 'Using an existing specimen' text is highlighted with a red box.

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Add-on Labs for Inpatient and Ambulatory

Behind the Scenes

1. When you select to use an existing specimen, the lab ultimately approves or denies the request. If they do not believe the specimen is viable for the add-on (for example, it was hemolyzed or quantity is no longer sufficient), they are able to trigger a new collection in the system, without affecting or adjusting the initial order that you placed.
2. The system determines the eligibility for the add-on specimen based on:
 - a. Age of the Specimen based on the test expiration time
 - b. Container type (ex: Mint, Lavender, Swab, Sterile Cup, etc.)
 - c. Remaining Volume in the Container
 - d. Performing Lab Section
3. There is an optimization project already planned to have the lab review all tests and update them to allow add-ons in more scenarios. In the meantime, the Beaker IT team will discuss with the lab and update the logic on individual tests as Service Now tickets are submitted.

Add-on Orders are Not Available in the Following Scenarios:

- The specimen in the lab has an order on it that was canceled due to specimen quality (Hemolyzed, Quantity Not Sufficient, etc.).
- The specimen in the lab has a microbiology order on it.
- The order that the user is attempting to add on is a microbiology order.
- The order that the user is attempting to add on is not performable in the lab where the specimen is currently located.
- The order(s) currently on the specimen and the order that the user is attempting to add on are not able to share a container (per lab policy, which is set individually on each test).
- The order that the user is attempting to add on is near/at its expiration time for the specimen (meaning the specimen is too old to perform the test).
- For Ambulatory only, the order that the user is placing is using a frequency other than “Once”, which is the only frequency that allows add-ons.
- The components that exist within the order that the user is attempting to add on already exist in an order that is already on the specimen. For example, you couldn’t add a Basic Metabolic Panel (BMP) onto a specimen that has a Comprehensive Metabolic Panel (CMP) order on it, because a CMP already contains every piece of a BMP.
- The specimen type indicated on the add-on order doesn't match the specimen type of the existing specimen in the lab.



Add-on orders placed into the comments section of a test will **NOT** be recognized or seen by lab staff. If add-on functionality is not presented when placing an order, please call the lab to add-on a send out test.

For Send-Out Add Ons, call the Referral Department at 773-702-6354

For In House Tests that were available Pre-Beaker for add-on and unable to add-on test, call the Laboratory Service Center at 773-795-3693.

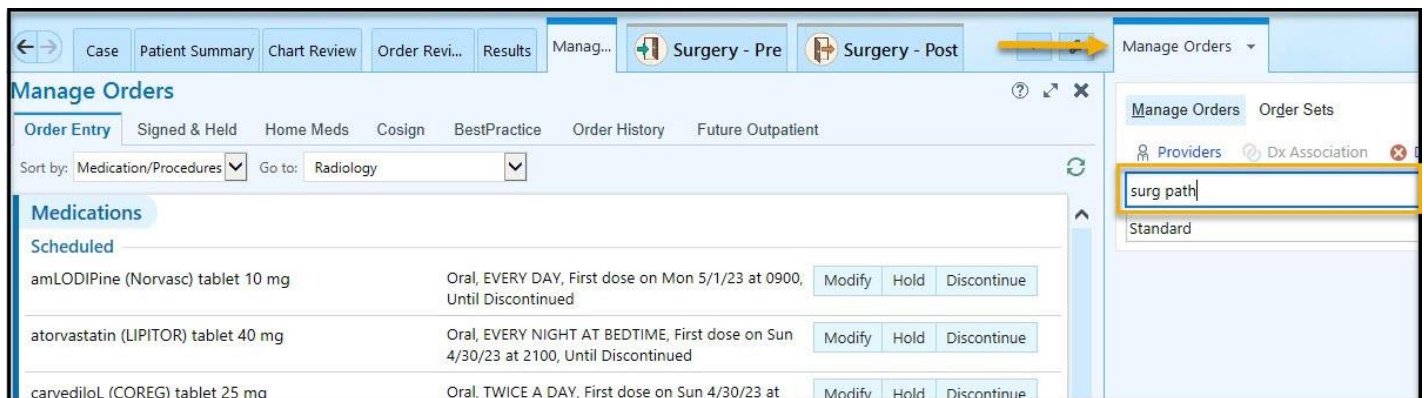
Epic Tip Sheet: Beaker HPK: Placing Orders for Kidney Biopsies for Providers

Summary

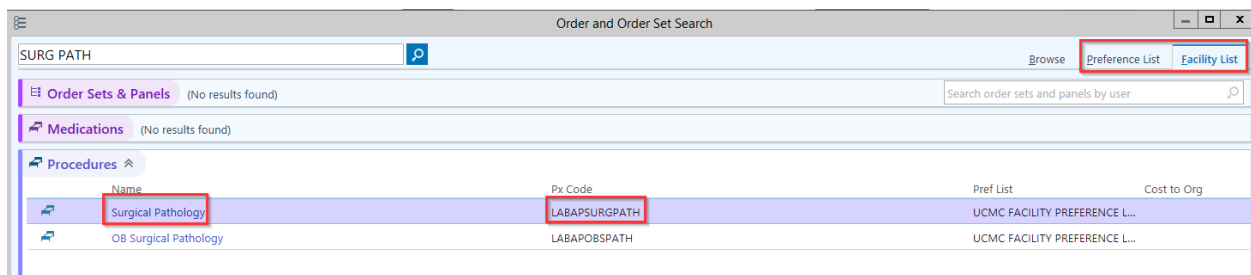
Providers can place inpatient and outpatient surgical pathology orders for kidney biopsy procedures.

Step-by-Step for Inpatients

1. Open patient encounter and navigate to the **Manage Orders** tab.
2. Type **Surg path** or **surgical pathology** in the manage orders window.



3. Look for the **LABAPSURGPATH** Px Code. If it is not available on your preference list screen, click on the tab at the top right that says **Facility List**.



4. A window will appear with required questions, like the brief history. Depending on how many samples will be collected (1 sample for IF, 1 sample for EM, 1 sample for LM), the specimen source question should be filled out accordingly.
5. If it is not known ahead of time how many biopsy samples are going to be collected, just one source and one order is needed. Additional sources can be added when the specimens are collected.

Epic Tip Sheet: Beaker HPK: Placing Orders for Kidney Biopsies for Providers

Surgical Pathology

Priority: ROUTINE

Frequency: ONCE

At: 5/3/2023

Specimen Type: Tissue

Brief History/Clinical Information: kidney transplant

Source of specimen(s):

Kidney, Right	IF
Kidney, Right	Lm transplant

Comments:

Reference Links: General Surgical Pathology Submission, Specialty Surgical Pathology Submission, Intraoperative Surgical Pathology

Phase of Care:

Step-by-Step for Outpatients (Future Orders)

1. Open the patient encounter.
2. In the Visit tab, navigate to the **Add Order** button.
3. In the search bar, type in **Surg Path** or **Surgical Pathology**.

surg path

4. Look for the **LABAPSURGPATH** Px Code. If it is not available on your preference list screen, click on the tab at the top right that says **Facility List**.

Name	Px Code	Pref List	Cost to
Surgical Pathology	LABAPSURGPATH	AMB FACILITY OP LABS	
OB Surgical Pathology	LABAPOBSPATH	AMB FACILITY OP LABS	

5. A window will appear with required questions, like the brief history and number of specimens. Depending on how many samples will be collected (1 sample for IF, 1 sample for EM, 1 sample for LM), the specimen source question should be filled out accordingly.
6. If it is not known ahead of time how many biopsy samples are going to be collected, just one source and one order is needed. Additional sources can be added when the specimens are collected.
7. Be sure the button for Future order is clicked. This order will be released during the procedure for collection.

Epic Tip Sheet: Beaker HPK: Placing Orders for Kidney Biopsies for Providers

Surgical Pathology Accept Cancel

Status: Normal Standing Future

Expected Date: 5/3/2023 Today Tomorrow 1 Week 2 Weeks 1 Month 3 Months 6 Months Approx.

Expires: 11/3/2023 1 Month 2 Months 3 Months 4 Months 6 Months 1 Year 18 Months

Priority: ROUTINE ROUTINE

Class: Unit Collect Unit Collect/Clinic Collect

Specimen Type: Tissue

Brief History/Clinical Information:

Number of specimens:

Source of specimen (s):

Comments:

Reference Links: [1. General Surgical Pathology Submission](#) [2. Specialty Surgical Pathology Submission](#) [3. Intraoperative Surgical Pathology](#)

Next Required Accept Cancel

8. Sign the order.

Epic Tip Sheet: Beaker

HPK: Placing Orders for Kidney Biopsies for Providers

Date	Summary of Revisions	User
5-3-23	created	Jessika Fuentes/Jamie Myers

Epic Training

Beaker

Lesson Plan



AT THE FOREFRONT
UChicago
Medicine

Information
Technology

Beaker Ambulatory



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CLASS INTRODUCTION

Training Introduction

Welcome to UCM Epic training for the Beaker Application in the Ambulatory setting. This course is a mandatory CBT for all clinical staff that will utilize Beaker to perform a “clinical collect” in an ambulatory clinic setting:

- An understanding of the workflows in Epic
- Exposure to terminology and functionality

Training Tools

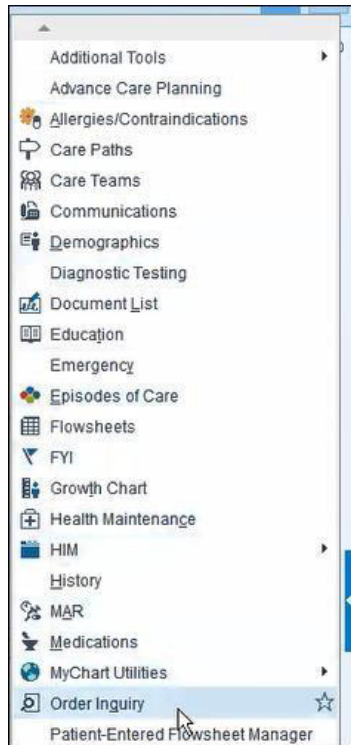
There are many tools available to you during your Epic learning experience, including:

- **E-Learning Lessons:** available through Absorb as the Ambulatory Beaker CBT in our learning management system
- **Independent Practice in the Playground:** after-class practice

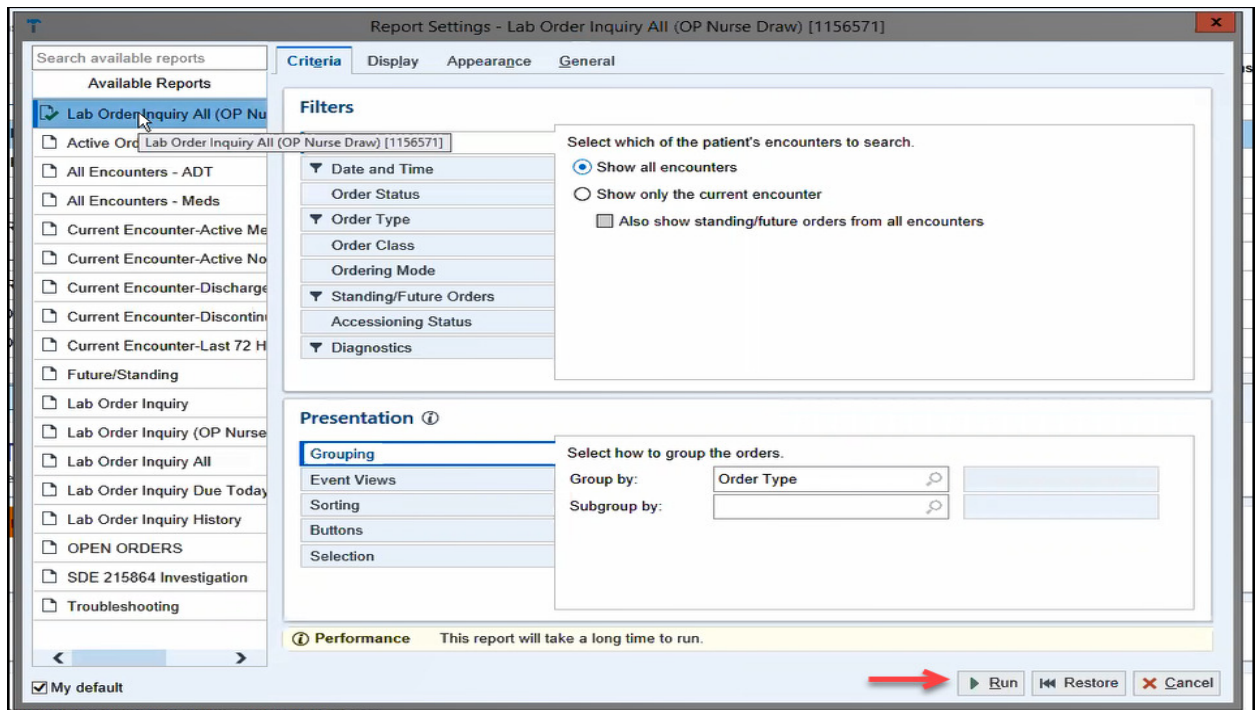
In the CBT, you will be shown how to perform a specimen collection using the “unit/clinic collect” feature of Beaker. This is a new workflow for this type of collection. You can practice the scenario in the Epic Playground after viewing the CBT. The exercise will reinforce this new workflow for your clinic and there is a tipsheet for you to refer to also.

LOGGING IN

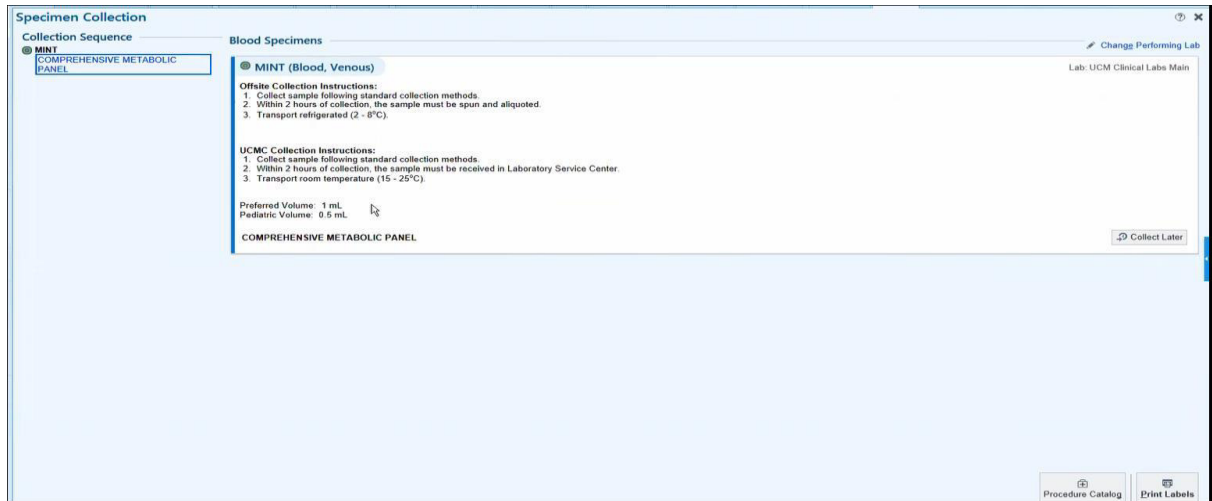
1. Locate and Launch ACE 02 or PLY2
2. Enter the User ID and Password as given below:
 - a. User ID: **Nurse 02-10**
 - b. Password: **train**
 - c. Dept : DCAM INT Med
3. Your Provider has ordered a Comprehensive Metabolic Profile (CMP) and the order is to be collected by the clinical staff (Nurse or CMA)
4. You open the patient’s chart to find and review the order.
5. You will go to the **Order Inquiry** option, which is found in the **Additional Tools** menu on the right side of your screen. If you will use regularly be sure to “star” this and it will be on you toolbar always.



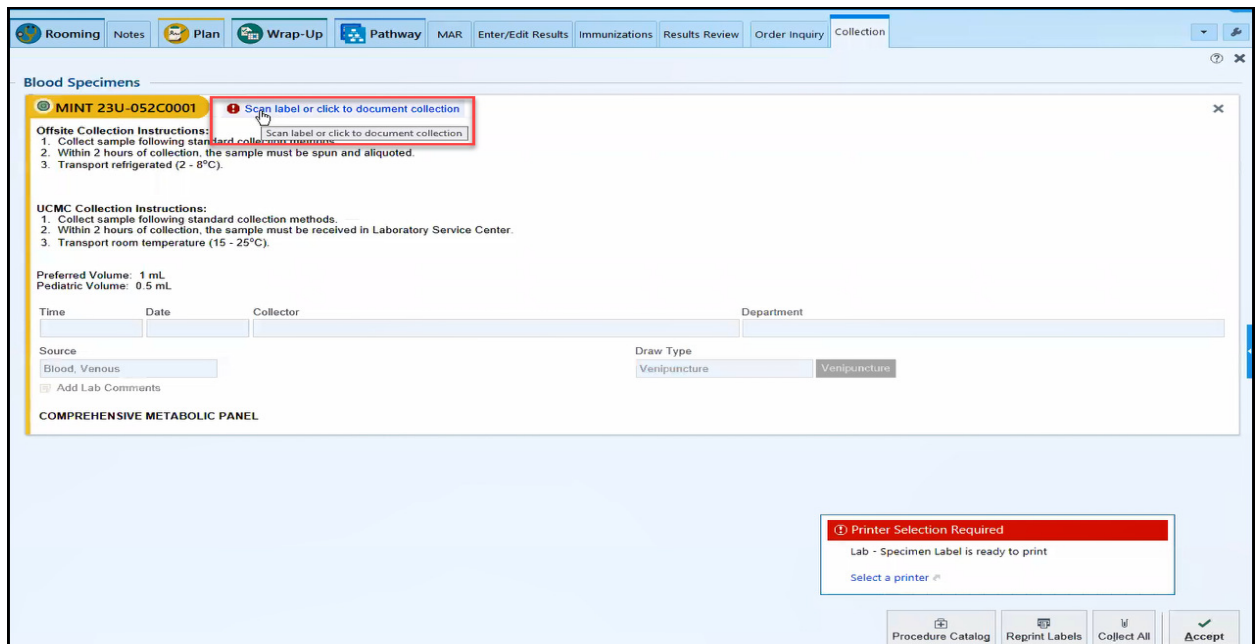
6. In Order Inquiry, it will go to a Reporting screen.
choose the **Lab Order Inquiry All - Outpatient Nurse Draw** and **Click Run:**



7. You will now see the order(s) for collection:



8. At this point, you will scan the patients' wristband or you can input the collection information manually. Once the information is entered, click to print the specimen label(s)



9. Apply the label to the specimen, Click accept to close this window. Send specimen to be picked up as per you clinics instruction.

The screenshot displays a medical software interface for specimen collection. The main window is titled "Specimen Collection" and contains two primary sections: "Collection Sequence" on the left and "Blood Specimens" on the right. In the "Collection Sequence" section, a specimen with ID "23U-052C0001.1" is listed, with a red arrow pointing to it. The "Blood Specimens" section shows a specimen "MINT 23U-052C0001" with a status of "Collected on 2/21/2023 at 9:44 AM by AMB R.N., RN in DERMATOLOGY", also indicated by a red arrow. Below this, there are "Offsite Collection Instructions" and "UCMC Collection Instructions" with numbered steps. Further down, there are fields for "Time" (9:44 AM), "Date" (2/21/2023), "Collector" (AMB R.N., RN), and "Department" (DERMATOLOGY). A "Source" dropdown is set to "Blood, Venous" and a "Draw Type" dropdown is set to "Venipuncture". A "COMPREHENSIVE METABOLIC PANEL" is listed below. At the bottom right, a red notification box states "Printer Selection Required" and "Lab - Specimen Label is ready to print". The bottom of the interface features a green bar with "All collections documented!" and a row of buttons: "Procedure Catalog", "Reprint Labels", "Collect All", and "Accept".

Epic Tip Sheet: Orders

Pathology Consult - Referred In Cases

Summary

When a patient comes to UCM for an appointment to likely transfer their care, pathology does a review of the relevant outside hospital materials (slides/blocks) based on UCM physician request (HemeOnc, surgeon, etc.). Pathology issues a report to our UCM provider, and when materials are sent back to the outside hospital, they are sent a copy of the report.

The UCM providers will enter a Pathology Consult order for these cases, and someone from their team, usually their nurse, then delivers the materials to Pathology Client Services. From there, staff in Client Services will find the patient's encounter and accession the case.

Step-by-Step

Provider Order Entry

Patient Presents with Materials to their Appointment

1. Enter a **Pathology Consult – HP** (Px Code: LABAPCONSULT) order as a **Normal** order.
2. In the order composer details, update the **Brief History/Clinical Information**.
3. ✓ **Sign** the order.
4. Deliver the materials to pathology.

Pathology Consult - HP

Status: **Normal** Standing Future

Priority: ROUTINE ROUTINE

Class: Unit Collect Unit Collect/Clinic Collect Print Script

Brief History/Clinical Information: patient referred in for transfer of care; slides from IU Methodist

Comments:

Reference Links: 1. General Surgical Pathology Submission 2. Specialty Surgical Pathology Submission 3. Intraoperative Surgical Pathology


Submitter:

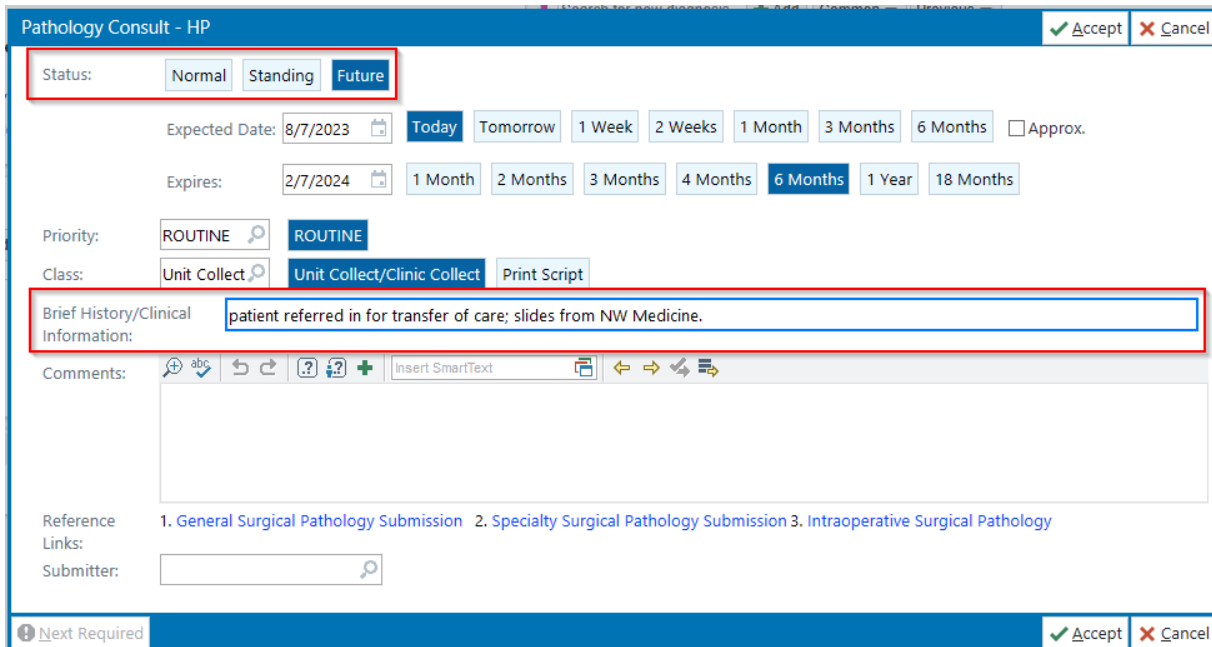
Next Required

Epic Tip Sheet: Orders

Pathology Consult - Referred In Cases

Patient Ships/Presents with Materials Outside of their Appointment

1. Navigate to the  **Orders Only** activity in Epic.
2. Create a **New** encounter.
3. Enter your name as the Provider and the appropriate department, if different from the default.
4. In the **Orders** activity, place an order for a **Pathology Consult – HP** (Px Code: LABAPCONSULT) as a **Future** order.



Pathology Consult - HP Accept Cancel

Status: Normal Standing Future

Expected Date: 8/7/2023 Today Tomorrow 1 Week 2 Weeks 1 Month 3 Months 6 Months Approx.

Expires: 2/7/2024 1 Month 2 Months 3 Months 4 Months 6 Months 1 Year 18 Months

Priority: ROUTINE

Class: Unit Collect/Clinic Collect Print Script





Brief History/Clinical Information:

Comments:

Reference Links: [1. General Surgical Pathology Submission](#) [2. Specialty Surgical Pathology Submission](#) [3. Intraoperative Surgical Pathology](#)

Submitter:

Next Required Accept Cancel

5. In the Order Composer details, update the **Brief History/Clinical Information**.
6. Click  **Accept**.
7.  **Sign** the order.
8. Associate the order with an appropriate diagnosis.
9. Click  **Accept**.
10.  **Sign** the Encounter.



When the materials are dropped off by the patient or shipped to pathology, the lab team will contact the schedulers in your department to create a Specimen Registration encounter to collect the order on.

Epic Tip Sheet: Beaker Doctor's Choice Tip Sheet

Summary



The hematology/oncology clinic utilizes a third party service, Doctor's Choice, that employs phlebotomists that travel to patient's homes and perform lab draws for UChicago Medicine. The laboratory labels are provided for the Doctor's Choice phlebotomist to pick up, perform the draw at the patient's home, and then return to the lab for processing. Use the workflow below to properly to schedule appointments and provide labels and process them appropriately when the labs are dropped off.

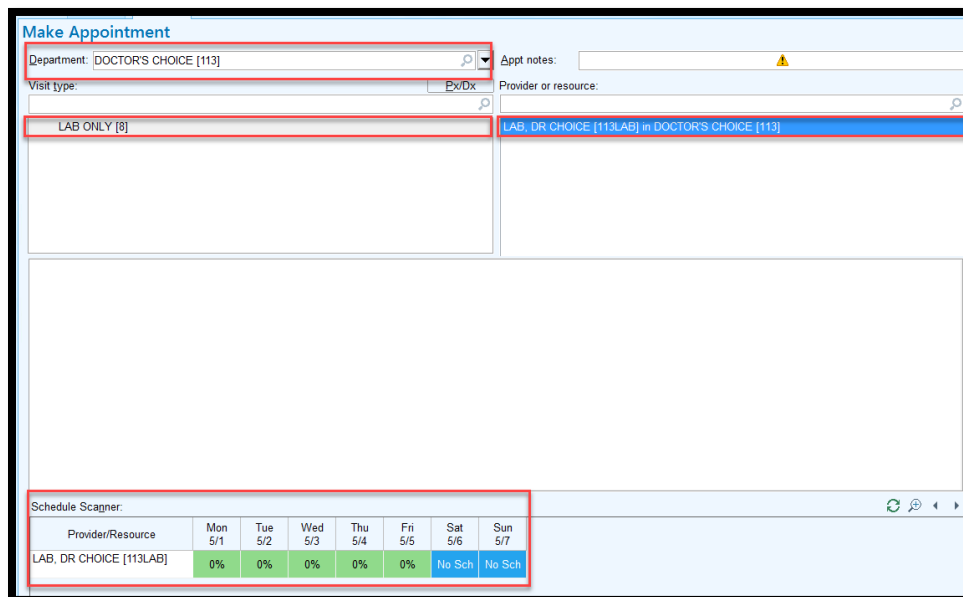
Step-by-Step

Doctor's Choice – Creating Future Appointments

Who: PSRs


When: Prior to Appointment date

1. Navigate to  **Appts**
2. Search for your patient by Name or MRN
3. Click  **Make Appt.**
4. Choose **DOCTOR'S CHOICE [113]** as the department, if not preset.
5. Choose a **Visit Type** of **LAB ONLY [8]**
6. Under **Provider or Resource**, choose **LAB, DR CHOICE [113LAB] in DOCTOR'S CHOICE [113]**
7. Create an appointment using the Schedule Scanner.



Provider/Resource	Mon 5/1	Tue 5/2	Wed 5/3	Thu 5/4	Fri 5/5	Sat 5/6	Sun 5/7
LAB, DR CHOICE [113LAB]	0%	0%	0%	0%	0%	No Sch	No Sch

Epic Tip Sheet: Beaker Doctor's Choice Tip Sheet

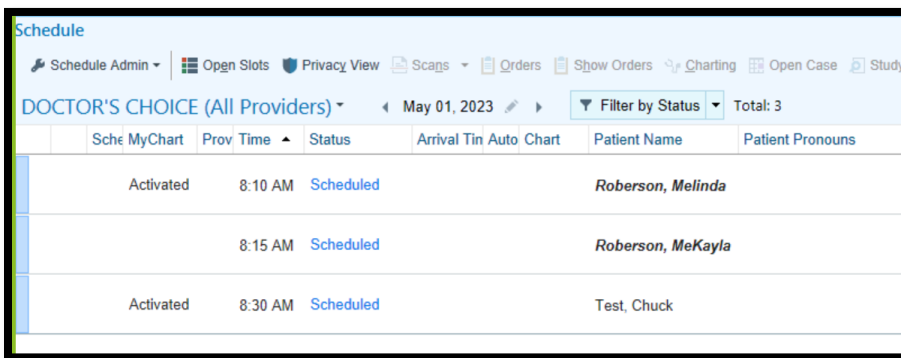
8. Choose an appointment time or time block in the **Provider Schedule**.
9. Click **Schedule**.
10. Review the appointment in Appointment Review and click  **Schedule**.
11. Complete the Registration process.

Lab 6H – Printing Labels



Who: PSRs or ONN




When: The Night Before

12. Open the appointment from the Multi-Provider schedule.



Sche MyChart	Prov	Time	Status	Arrival Tin Auto Chart	Patient Name	Patient Pronouns
Activated		8:10 AM	Scheduled		Roberson, Melinda	
		8:15 AM	Scheduled		Roberson, MeKayla	
Activated		8:30 AM	Scheduled		Test, Chuck	

13. The night before the Dr's Choice appointment, open the scheduled appointment and find the orders either in **Order Inquiry** or release orders from the **Beacon Treatment Plan**.
14. In Order Inquiry, click  **Collect Specimens** for all orders that are meant for the Doctor's Choice Phleb to collect.
15. Click  **Print Labels**.

 Do not click  **Collect Specimens** or **Scan** the barcodes to document collection. Click the  to close the collection activity at this point.

16. Staple the labels to the Doctor's Choice requisition for pickup by the phlebotomist.

Epic Tip Sheet: Beaker Doctor's Choice Tip Sheet

Checking in Appointments

Who: PSRs

When: The Morning of Appointment

Check in all patients according to policy located on the DAR using the Check-In workflow.

Department Appointments Report: Temporary Report

Refresh Settings Appt Desk Walk In Sign In **Check In** Check Out Orders/Follow-Ups Appt Info Registration

1 Full Appointment List 2 Appointment Totals

Date: 5/1/2023 DOCTOR'S CHOICE [113]

Visit Date	Time	Ms Patient	Phone	Provider/Resource	Appt Status
05/01/2023	8:10 AM	Roberson, Melinda	Hm: 502-553-6036	LAB, DR CHOICE	Sch


Epic Tip Sheet: Beaker Doctor's Choice Tip Sheet

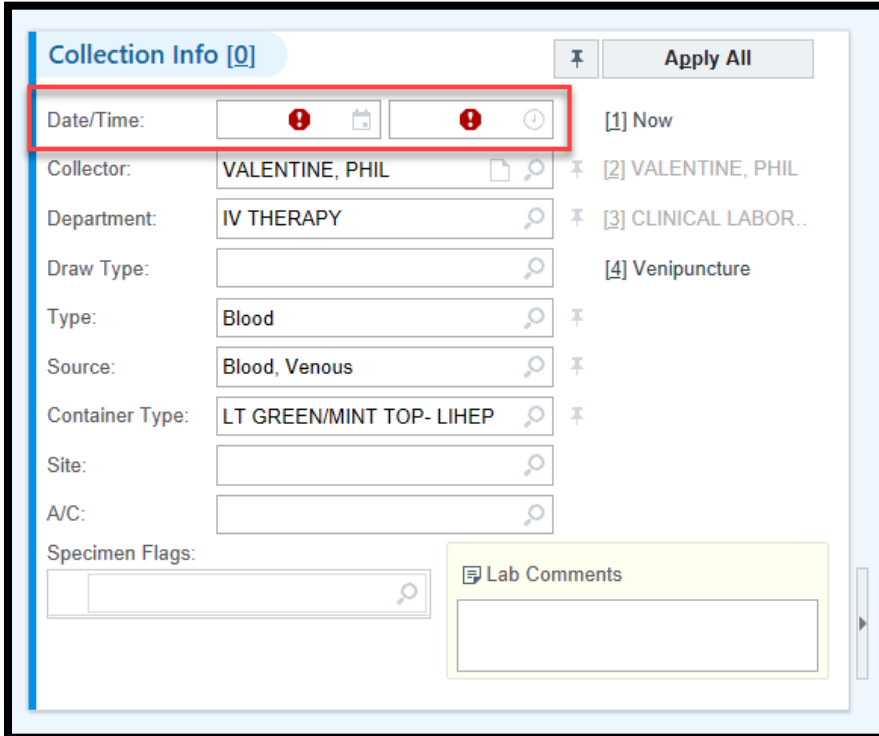
Lab Service Center – Receiving Specimens

Who: ONN

When: After Specimens are dropped off

Once specimens are dropped off or arrive from the clinic after Doctor's Choice dropped off the specimens, use the workflow below to receive the specimens and enter the collection times.


1. Navigate to the  **Receiving** activity.
2. Scan the barcode(s).
3. Enter the collection time in the Receiving activity
 - a. Collection date and time should be written on the tube or on the Doctor's Choice requisition.



The screenshot shows the 'Collection Info' form in Epic. The 'Date/Time' field is highlighted with a red box and contains two red exclamation mark icons. The form includes the following fields and values:

Field	Value
Date/Time:	[Red exclamation mark icon] [Red exclamation mark icon]
Collector:	VALENTINE, PHIL
Department:	IV THERAPY
Draw Type:	
Type:	Blood
Source:	Blood, Venous
Container Type:	LT GREEN/MINT TOP- LIHEP
Site:	
A/C:	
Specimen Flags:	

A 'Lab Comments' section is also visible at the bottom right of the form.

4. Click  **Receive**.
5. Route the specimen to the appropriate laboratory for testing.

Epic Tip Sheet: Beaker Doctor's Choice Tip Sheet

Canceling and Rescheduling an Appointment

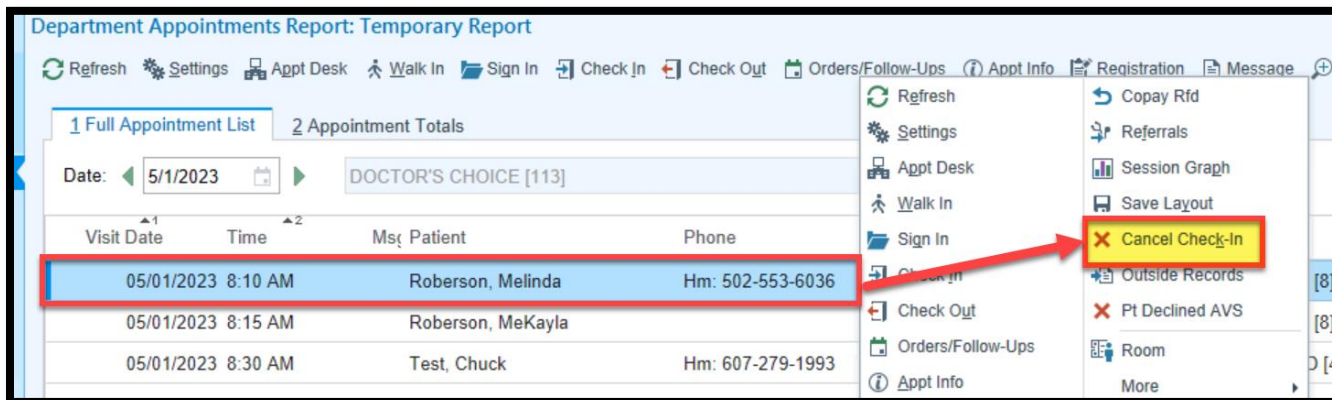
If a specimen was unable to be collected for a patient on the schedule the appointment would need to be canceled or rescheduled based on operational policy.

Who: PSRs

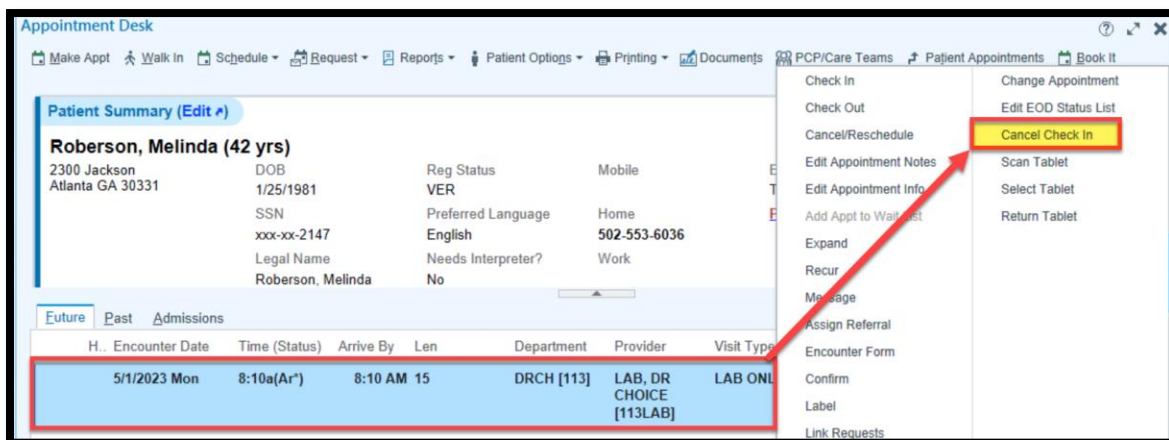
When: If the specimen is not collected that day

1. Highlight your patient from the **DAR** or **Appointment Desk**
2. Right click
3. Select **Cancel Check-In**

DAR Screen Shot

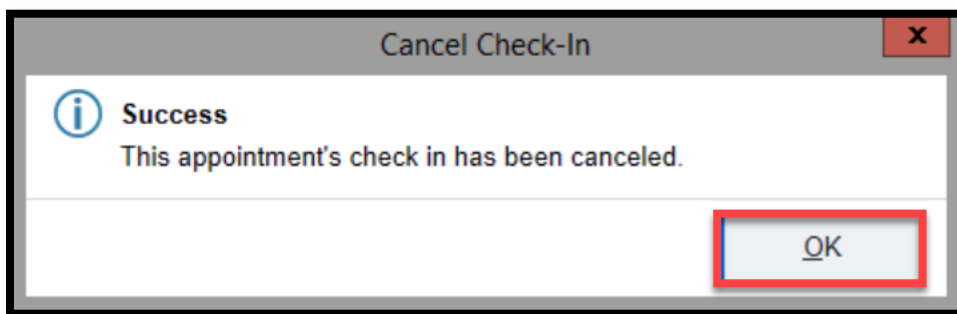


Appointment Desk Screen Shot



Epic Tip Sheet: Beaker Doctor's Choice Tip Sheet

4. Select **OK** when the Cancel Check-In warning appears.



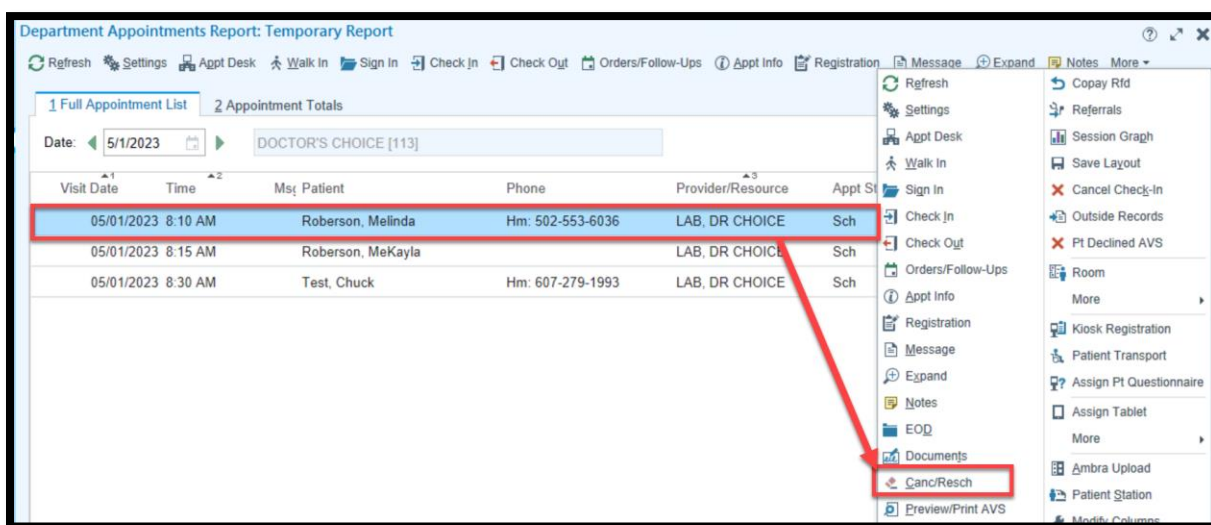
The status will now display as SCH (Scheduled)

Visit Date	Time	Ms; Patient	Phone	Provider/Resource	Appt Status	Type
05/01/2023	8:10 AM	Roberson, Melinda	Hm: 502-553-6036	LAB, DR CHOICE	Sch	Lab Only [8]
05/01/2023	8:15 AM	Roberson, MeKayla		LAB, DR CHOICE	Sch	Lab Only [8]
05/01/2023	8:30 AM	Test, Chuck	Hm: 607-279-1993	LAB, DR CHOICE	Sch	CAROTID [447]

You can now cancel or reschedule the appointment from the DAR or Appointment Desk

DAR

1. Highlight the patient
2. Right Click
3. Select **Canc/Resch**



Epic Tip Sheet: Beaker Doctor's Choice Tip Sheet

Appointment Desk

Future	Past	Admissions							
H..	Encounter Date	Time (Status)	Arrive By	Len	Department	Provider	Visit Type	Notes	
	5/1/2023 Mon	8:10a	8:10 AM	15	DRCH [113]	LAB, DR CHOICE [113LAB]	LAB ONLY [8]	Speci	

Check In | Check Out | **Cancel/Reschedule** | Edit Appointment Notes | Edit Appointment Info | Copy into Make Appointment | Expand | Recur

4. Select a **Cancel/Reschedule Reason**
5. Enter a **Comment**
6. Select **Reschedule**

Cancel Appointments

Patient: Melinda Roberson

Monday May 1, 2023

LAB ONLY DOCTOR'S CHOICE 8:10 AM LAB, DR CHOICE

Cancel/Reschedule Reason
Patient Cancelled

Cancel/Reschedule Comment
Specimen was not collected

You will be taken to the Make Appointment screen to reschedule the patient.

Epic Tip Sheet: Beaker Doctor's Choice Tip Sheet

Date	Summary of Revisions	User
4/25/23	New Tip Sheet	Steph Gillen
5/02/23	Edited Tip Sheet	Melinda Roberson

Epic Tip Sheet: Beaker Timed Draws: Glucose Tolerance Testing (GTT)



Summary

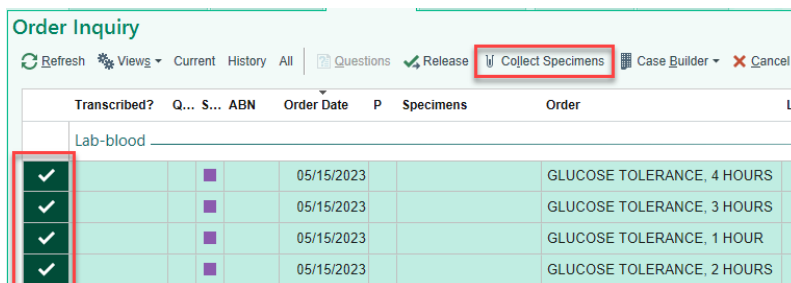
Glucose Tolerance Testing is performed to determine how quickly a patient's body moves sugar from the blood into tissues. There are multiple versions of the test that span from 1 hour to 4 hour timed draws that need specimens collected at specific time points. Use the workflow below to appropriately collect, label, and perform each step of these timed lab draws.

Step-by-Step

Timed Glucose Tolerance Testing

Use the steps below to collect specimens for patients with orders for the 1, 2, 3, or 4-hour Glucose Tolerance Tests.


- 1) Navigate to the  **Schedule**.
- 2) Find your patient and double click their name to open **Order Inquiry**.
- 3) Select the Glucose Tolerance Test (1, 2, 3, or 4 Hour).
- 4) Click  **Collect Specimens**.

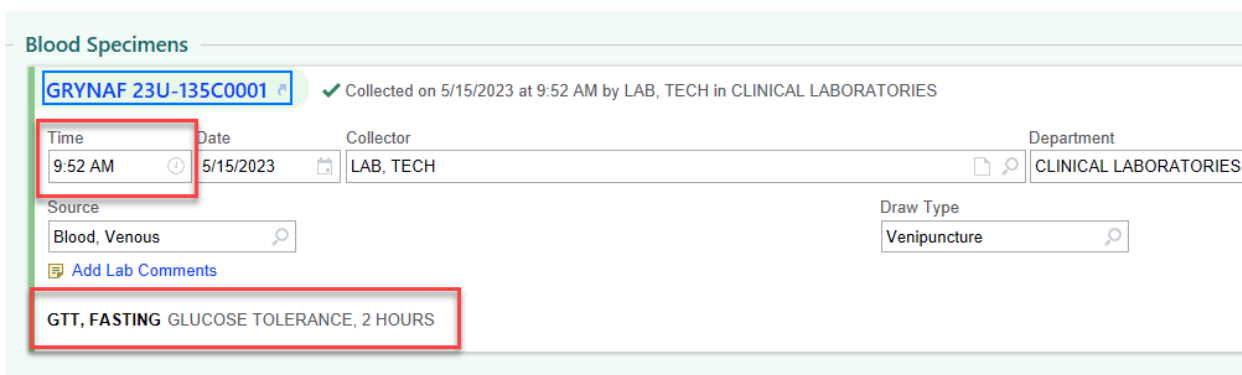


Transcribed?	Q...	S...	ABN	Order Date	P	Specimens	Order	La
<input checked="" type="checkbox"/>			<input type="checkbox"/>	05/15/2023			GLUCOSE TOLERANCE, 4 HOURS	
<input checked="" type="checkbox"/>			<input type="checkbox"/>	05/15/2023			GLUCOSE TOLERANCE, 3 HOURS	
<input checked="" type="checkbox"/>			<input type="checkbox"/>	05/15/2023			GLUCOSE TOLERANCE, 1 HOUR	
<input checked="" type="checkbox"/>			<input type="checkbox"/>	05/15/2023			GLUCOSE TOLERANCE, 2 HOURS	




When you bring the order into the collection sequence, the first order of the Timed Draw will appear. In these cases, the **GTT, Fasting**.

- 5) Click  **Print Labels** and collect the specimen.
- 6) Scan the barcode for the Fasting GTT and update the collection time, if needed.



Blood Specimens

GRYNAF 23U-135C0001  Collected on 5/15/2023 at 9:52 AM by LAB, TECH in CLINICAL LABORATORIES


Time	Date	Collector	Department
9:52 AM	5/15/2023	LAB, TECH	CLINICAL LABORATORIES


Source: Blood, Venous Draw Type: Venipuncture

[Add Lab Comments](#)


GTT, FASTING GLUCOSE TOLERANCE, 2 HOURS

Epic Tip Sheet: Beaker Timed Draws: Glucose Tolerance Testing (GTT)

7) Click  **Accept** to close out of the patient's chart.




When you navigate back into Order Inquiry, there will now be a new order for the next timed draw.
Wait the designated amount of time and call the patient back to collect the next specimen.

8) Double click on the patient's name on the  **Schedule** to open Order Inquiry.


9) Select the **GTT 0.5 HR** and repeat steps 4 through 7.


10) Repeat for each time point until all timed draws are completed.

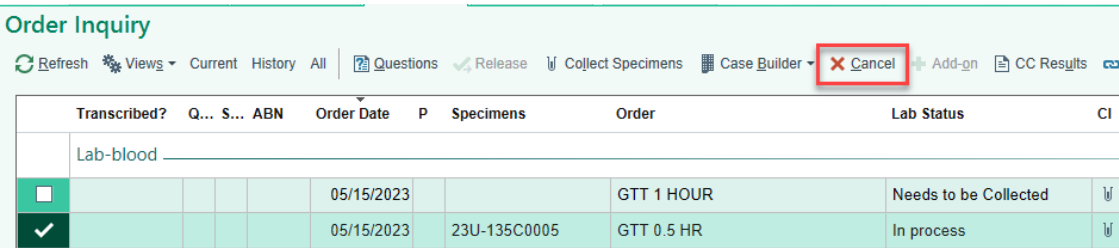


Every time point/specimen should be brought into the collection sequence separately and have a **UNIQUE** specimen ID.

Test	Time Points	Total Specimens with Unique Specimen IDs
Glucose Tolerance Test, 1 Hour	Fasting, 0.5 HR, 1 HR	3
Glucose Tolerance Test, 2 Hour	Fasting, 0.5 HR, 1 HR, 2 HR	4
Glucose Tolerance Test, 3 Hour	Fasting, 0.5 HR, 1 HR, 2 HR, 3 HR	5
Glucose Tolerance Test, 4 Hour	Fasting, 0.5 HR, 1 HR, 2 HR, 3 HR, 4HR	6



If a patient does not present for a time point (ex: misses the 1 hour for a 3 hour GTT) but presents for the time point after (ex: the 2 hour), still collect the previous time point in the collection sequence. However, go back into Order Inquiry, select the missed time point that you just collected, and click  **Cancel**.






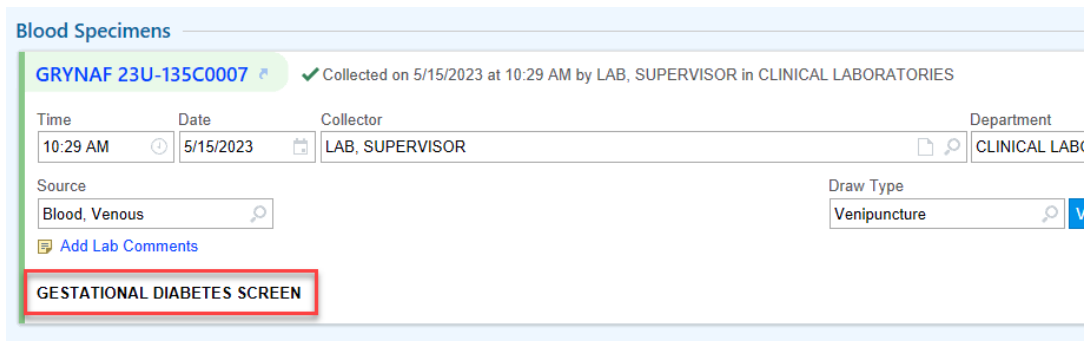
Epic Tip Sheet: Beaker Timed Draws: Glucose Tolerance Testing (GTT)

Gestational Diabetes Screen


Use the steps below to collect a specimen for a patient with an order for a Gestational Diabetes Screen.

These collections are only ONE specimen!

- 1) Navigate to the  **Schedule**.
- 2) Find your patient and double click their name to open **Order Inquiry**.
- 3) Select the Gestational Diabetes Screen
- 4) Click  **Collect Specimens**.
- 5) Click  **Print Labels** and collect the specimen.
- 6) Scan the barcode.




The screenshot shows the 'Blood Specimens' form in Epic. At the top, it displays the patient ID 'GRYNAF 23U-135C0007' and a status 'Collected on 5/15/2023 at 10:29 AM by LAB, SUPERVISOR in CLINICAL LABORATORIES'. Below this is a table with columns for Time, Date, Collector, and Department. The values are: Time: 10:29 AM, Date: 5/15/2023, Collector: LAB, SUPERVISOR, and Department: CLINICAL LAB. There are also fields for Source (Blood, Venous) and Draw Type (Venipuncture). At the bottom, there is a red-bordered box containing the text 'GESTATIONAL DIABETES SCREEN'.

- 7) Click  **Accept** to close out of the patient's chart.

Gestational Glucose Tolerance Test

Use the steps below to collect specimens for a patient with an order for a Gestational Glucose Tolerance Test. This order is a timed draw similar to a normal glucose tolerance test.

- 1) Navigate to the  **Schedule**.
- 2) Find your patient and double click their name to open **Order Inquiry**.
- 3) Select the Gestational Glucose Tolerance Test.
- 4) In the **Order Summary**, search for the Questions field to determine the Dextrose Load for the test.

Epic Tip Sheet: Beaker Timed Draws: Glucose Tolerance Testing (GTT)

5) After determining the Dextrose Load, click **Collect Specimens**.



When you bring the order into the collection sequence, the first order of the Timed Draw will appear. In this case, the **Gestational GTT Fasting**.

6) Click **Print Labels** and collect the specimen.

7) Scan the barcode for the Gestational GTT Fasting and update the collection time, if needed.

8) Click **Accept** to close out of the patient's chart.



When you navigate back into Order Inquiry, there will now be a new order for the next timed draw.

Wait the designated amount of time and call the patient back to collect the next specimen.

9) Double click on the patient's name on the **Schedule** to open Order Inquiry.

10) Select the **Gestational GTT 1 Hour** and repeat steps 5 through 8.

11) Repeat for each time point until all timed draws are completed.

Epic Tip Sheet: Beaker

Timed Draws: Glucose Tolerance Testing (GTT)

If a patient does not present for a time point (ex: misses the 1 hour) but presents for the time point after (ex: the 2 hour), still collect the previous time point in the collection sequence. However, go back into Order Inquiry, select the missed time point that you just collected, and click **✗ Cancel**.



Order Inquiry

Refresh Views Current History All Questions Release Collect Specimens Case Builder **✗ Cancel** Add-on

Transcribed?	Q...	S...	ABN	Order Date	P	Specimens	Order	Lab Status
				05/15/2023			GESTATIONAL GTT 2 HOUR	Needs to be Col
✓				05/15/2023		23U-135C0009	GESTATIONAL GTT 1 HOUR	In process

Date	Summary of Revisions	User
5/15/23	New Tip Sheet	Steph Gillen

Epic Tip Sheet: Label Placement

Summary

The tip sheet below will outline how to correctly place labels on specimen tubes.

Steps

1. The label should be placed over the manufacture label.
2. The name of the patient should be placed at the top of the tube under the colored cap and should be read from left to right.
3. The vertical barcode should be wrinkle free for scanning purposes.



Epic Tip Sheet: Label Placement

- Each tube should have its own label.

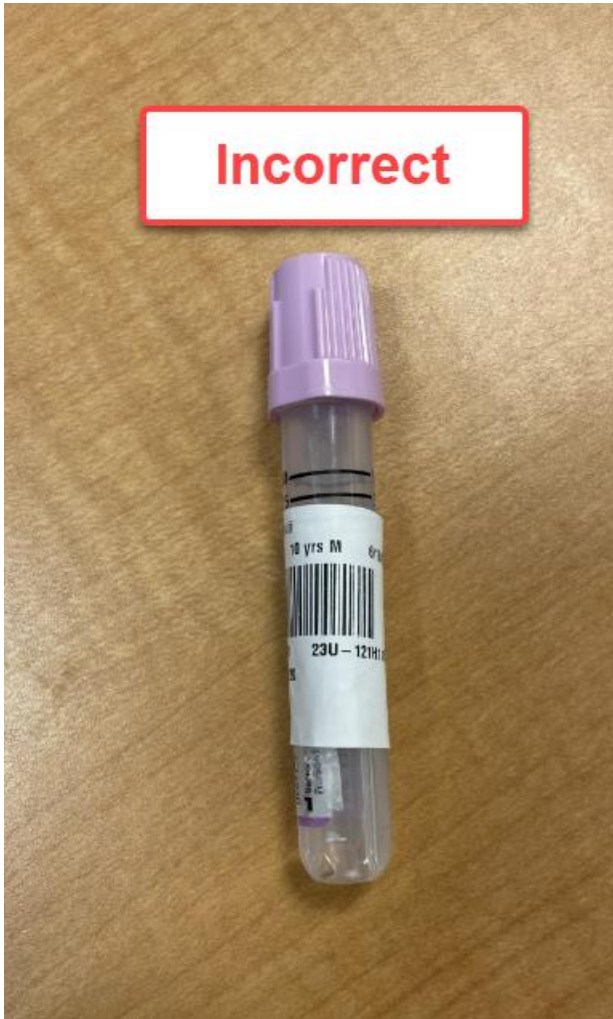


- Leave a window for the specimen volume to be visible.



Epic Tip Sheet: Label Placement

- The label should not overlap itself or wrap around the tube horizontally. Please make sure that the label is not too low where it is folding at the bottom of the tube. The label should have no wrinkles.



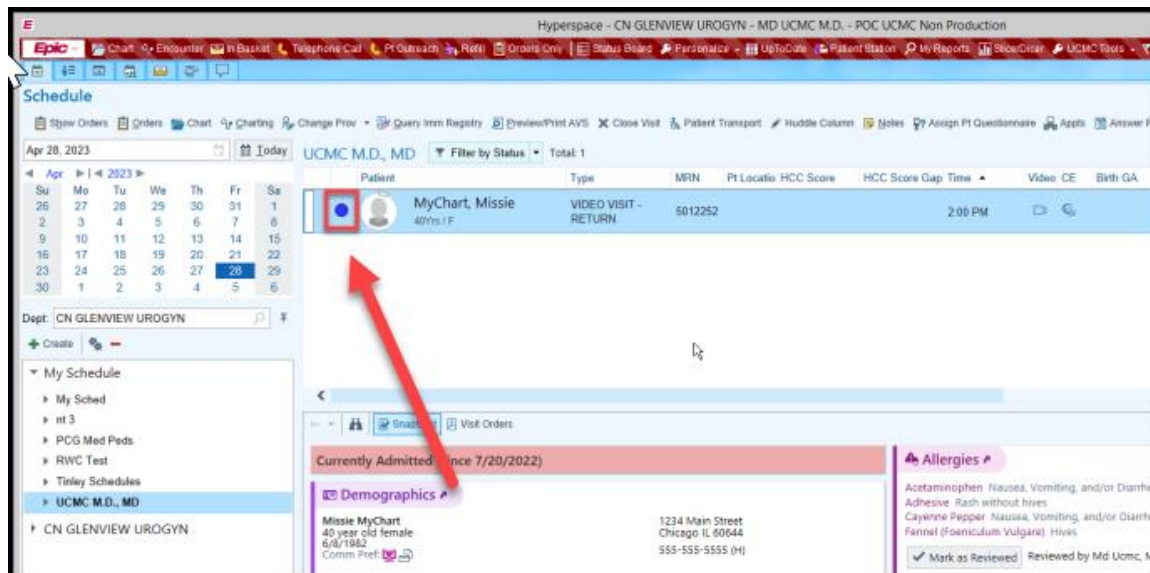
Epic Tip Sheet: AMB - Beaker Specimen Collection Documentation, Printing, and Reprinting Workflow

Summary

This tip sheet describes the Beaker workflow for clinical staff who will be completing specimen collection documentation, printing labels, and reprinting labels if needed.

Step-by-Step: Collect Specimen and Document Collection After Order Has Been Placed

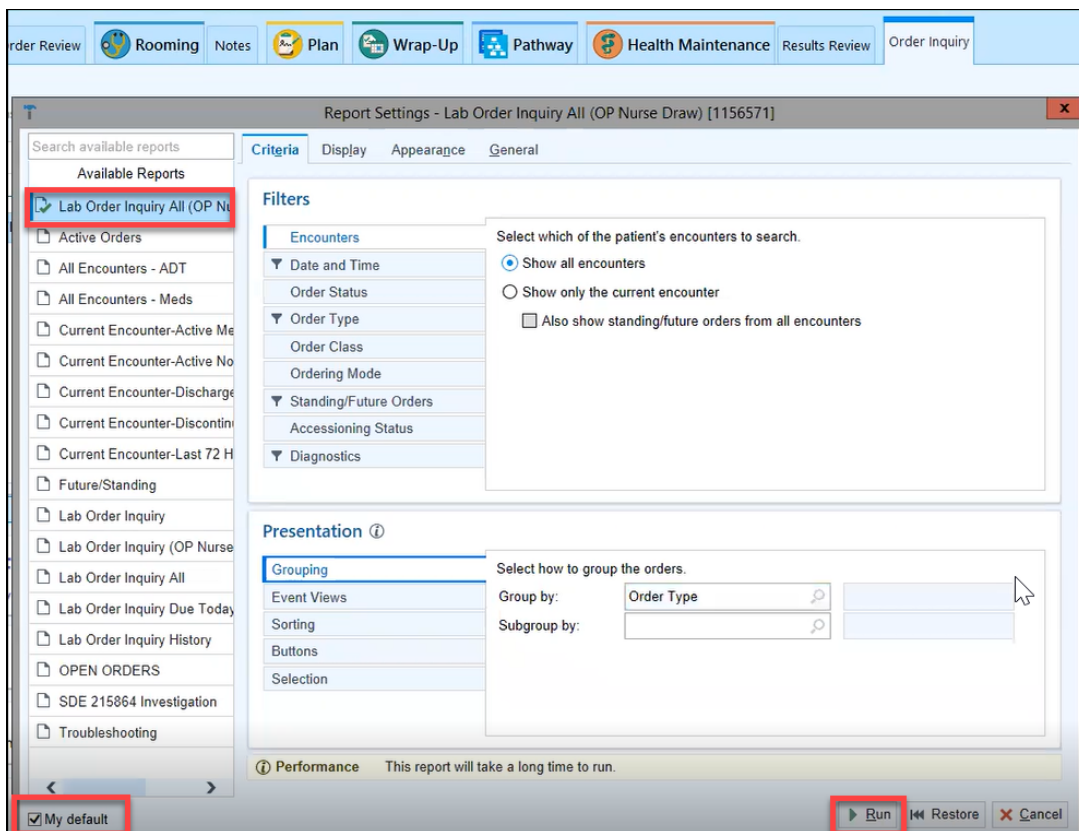
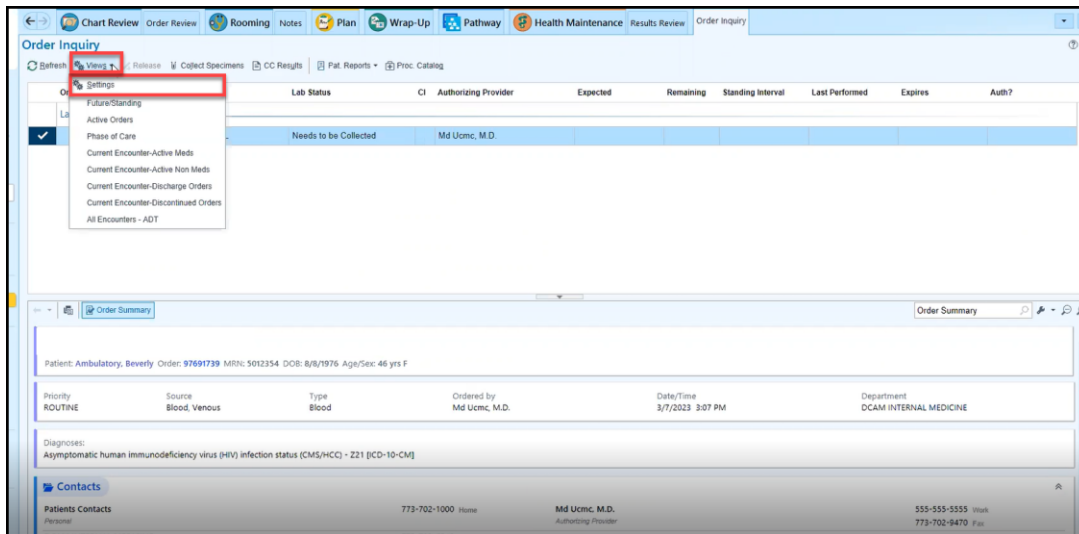
Your clinic should be utilizing colored communication dots in the Schedule activity to relay the status of a patient throughout their visit. If your clinic is not currently using the **blue** dot to indicate that the patient has pending tasks to be executed in clinic, your clinic should now do so.



1. In the patient's encounter, navigate to the Order Inquiry activity.
 - a. If you do NOT see this activity, it may be hidden in the More Activities dropdown menu located on the right-hand side of the screen. Make it a favorite by clicking the **star** to the right of the activity name.

IMPORTANT: A pop-up window may appear, allowing you to choose from a list of orders to view. If your orders do NOT appear (or the pop-up window does not appear), select the **Views** button located in the toolbar > select **Settings** > select the **Lab Order Inquiry All** report > check the **My Default** checkbox > select **Run**.

Epic Tip Sheet: AMB - Beaker Specimen Collection Documentation, Printing, and Reprinting Workflow

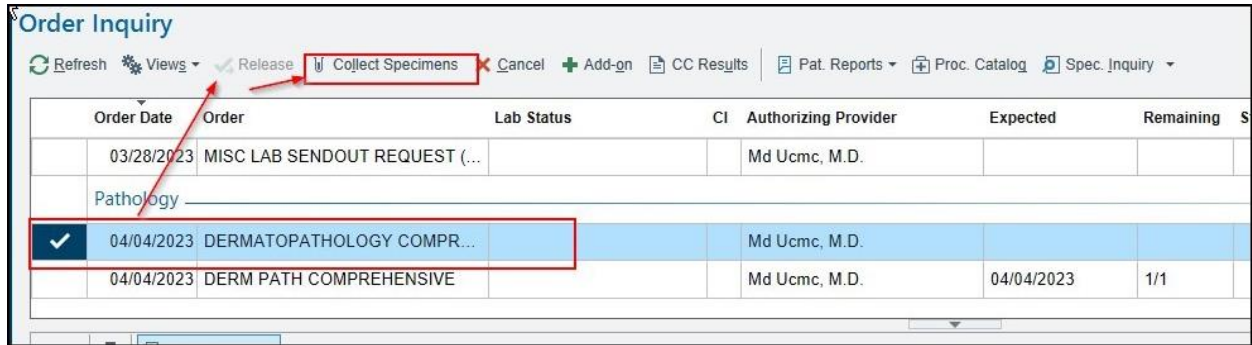


2. Select your order if it is not already selected.

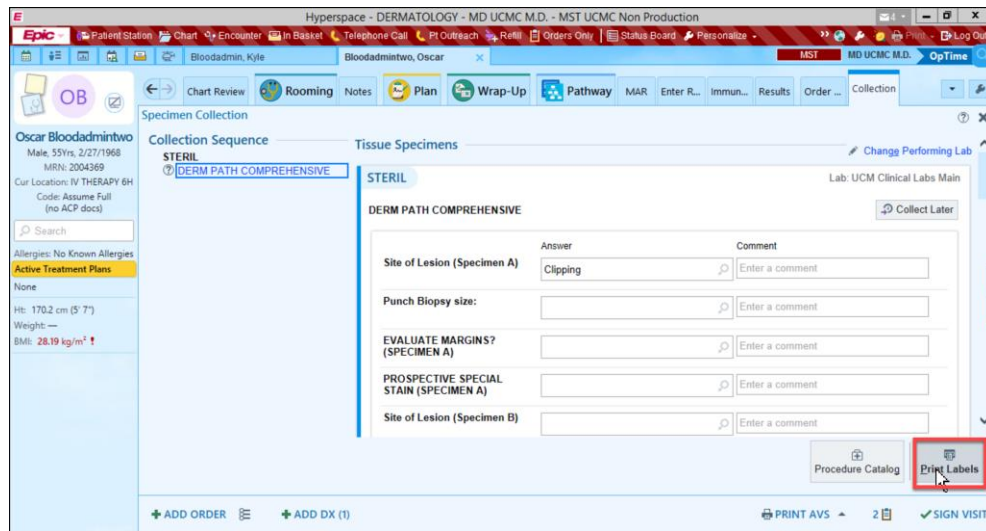
NOTE: You may need to unselect other orders that may appear checked and are irrelevant to this particular specimen collection.

Epic Tip Sheet: AMB - Beaker Specimen Collection Documentation, Printing, and Reprinting Workflow

IMPORTANT: Make note of whether or not the **Release** button in the toolbar is greyed out. If it is greyed out, it implies that the order status was set to **Normal**, and therefore, the label will have automatically printed upon signing the order. Proceed by selecting the **Collect Specimens** button. If the **Release** button is *active*, it implies that the order status was set to **Future**. Therefore, you must select the **Release** button PRIOR to selecting the **Collect Specimens** button.

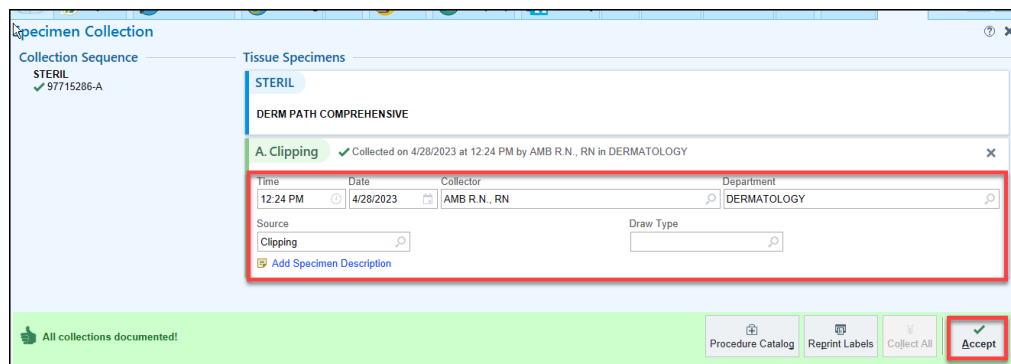


3. Select **Print Labels**.



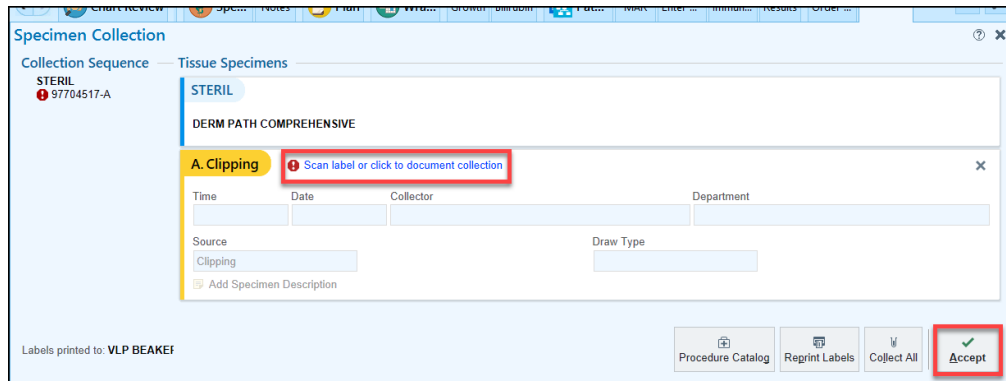
4. Scan the patient label (i.e., the recommended workflow).

- a. The collection date and time will auto-populate in the specimen collection fields.



Epic Tip Sheet: AMB - Beaker Specimen Collection Documentation, Printing, and Reprinting Workflow

IMPORTANT: If the scanner is missing or malfunctioning, select the [Scan label or click to document collection](#) link and specify a reason for not scanning (in the pop-up window that appears). The collection date and time will auto-populate in the specimen collection fields. The fields can be modified, but **MUST** be completed.



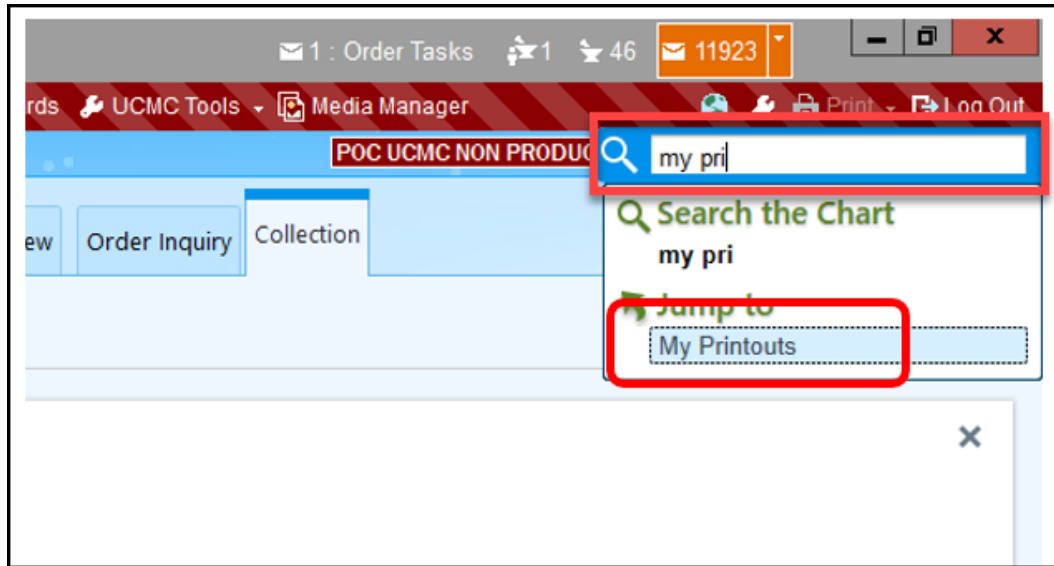
5. Select **Accept**.

IMPORTANT: If your label does NOT print from the specimen label printer, refer to the “reprint” steps on the following page to reselect a printer and reprint a label.

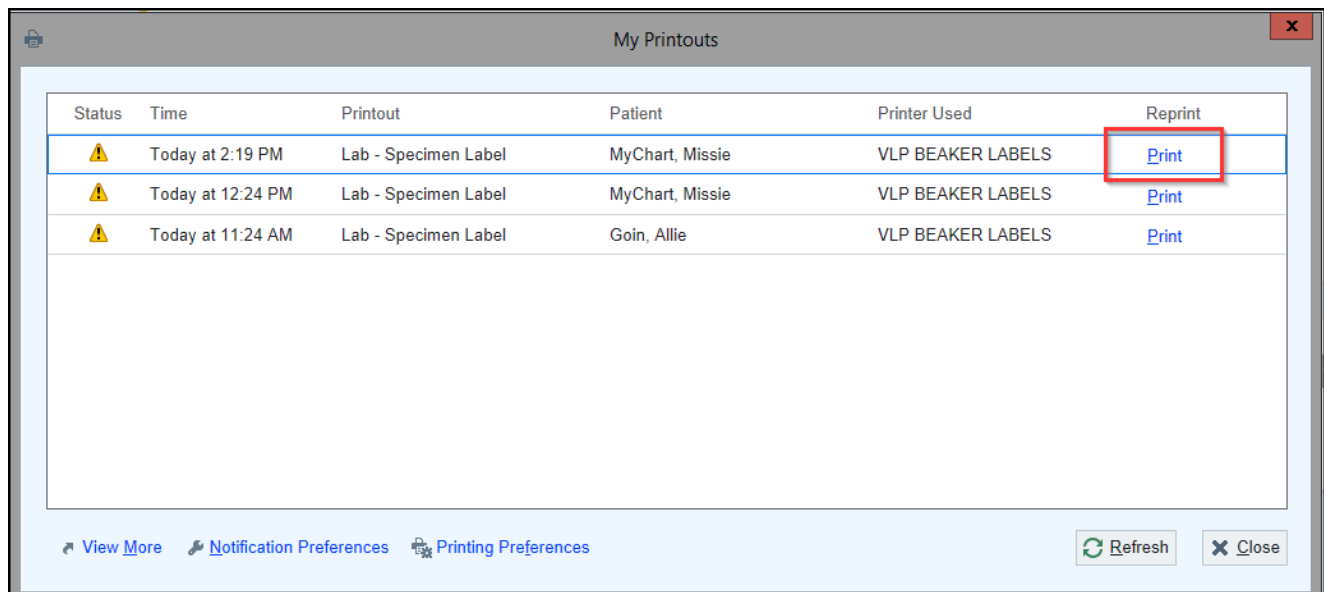
Epic Tip Sheet: AMB - Beaker Specimen Collection Documentation, Printing, and Reprinting Workflow

Step-by-Step: Reprint a Label (or Reselect a Printer)

1. Use Chart Search to lookup “my printouts”.



2. Select the [Print](#) hyperlink next to the appropriate label.



Status	Time	Printout	Patient	Printer Used	Reprint
⚠	Today at 2:19 PM	Lab - Specimen Label	MyChart, Missie	VLP BEAKER LABELS	Print
⚠	Today at 12:24 PM	Lab - Specimen Label	MyChart, Missie	VLP BEAKER LABELS	Print
⚠	Today at 11:24 AM	Lab - Specimen Label	Goin, Allie	VLP BEAKER LABELS	Print

IMPORTANT: When the printer selection pop-up window appears, ensure that the selected printer matches the *full* name that appears on the specimen label printer’s sticker. Pay particularly close attention to the last few characters.

Epic Tip Sheet: AMB - Beaker Specimen Collection Documentation, Printing, and Reprinting Workflow

Date	Summary of Revisions	User
4/28/23	Created	Gabby Gervasio
5/8/23	Revised	Gabby Gervasio

Epic Tip Sheet: Beaker Ordering Microbiology Speciation and Susceptibilities for Providers

Summary

In cases where additional speciation or susceptibility testing of organisms in culture is warranted, use the workflow below to place an add-on order for the Clinical Microbiology laboratory to document your request.

Step-by-Step



This workflow should **ONLY** be used in cases of Susceptibility or Speciation Add-Ons.

For culture add-ons (ex: AFB Culture & Stain) use the regular Add-On Workflow by placing an order and adding on to an existing specimen.

Microbiology: Susceptibility Add-On

1. In the Visit Taskbar or Manage Orders, place an order for the Miscellaneous Micro Susceptibility Add-On (Px Code: **LABMCMISUB**)
2. In the order, answer the applicable order questions:

Miscellaneous Micro Susceptibility Add-On

Original Culture Specimen Accession #:

Organism to be Tested:

Antibiotics to be Tested: + Add

Provider Contact/Pager Number:

Comments: + Add Comments

Next Required Link Order

- a. Enter the **Original Culture Accession #** that can be found in Chart Review for the original order here:

Epic Tip Sheet: Beaker Ordering Microbiology Speciation and Susceptibilities for Providers

Patient Information

Patient Name	MRN#	Legal Sex	DOB			
Beaker, Carl	5012705	M	2/8/1994			
Test Name	Procedure Code	Lab	CSN	Epic Order#	Lab Accession#	External Order#
CULTURE, NASAL [134038]	LABMCNASCB	UNIVERSITY OF CHICAGO HOSPITALS LABORATORIES [1]	100011283	97705332	23U- 097M0001	

- Enter the name of the **Organism to be Tested** (ex: *E. coli*, *E. cloacae*, *S. aureus*, etc.)
- In **Antibiotics to be Tested**, enter the requested drugs using the **+ Add** field or if generic susceptibilities are requested, use the comments field to the right of the **Add** button to free-text the request.
- In the **Provider Contact/Pager Number**, enter a contact number for yourself or a member of your team so if the Micro lab has questions about the request, they can easily reach you.

- Click **✓ Accept**
- ✓ Sign** the order.

Microbiology: Speciation Add-On

- In the Visit Taskbar or Manage Orders, place an order for the Miscellaneous Micro Speciation Add-On (Px Code: **LABMCMISPEB**)
- In the order, answer the applicable order questions:

Miscellaneous Micro Speciation Add-On ✓ Accept ✗ Cancel

! Original Culture Specimen Accession #:

! Organism to be Speciated:

! Provider Contact/Pager Number:

Comments: [+ Add Comments](#)

! Next Required [Link Order](#) ✓ Accept ✗ Cancel

Epic Tip Sheet: Beaker Ordering Microbiology Speciation and Susceptibilities for Providers

- a. Enter the **Original Culture Accession #** that can be found in Chart Review for the original order here:

Patient Information

Patient Name	MRN#	Legal Sex	DOB
Beaker, Carl	5012705	M	2/8/1994



Test Name	Procedure Code	Lab	CSN	Epic Order#	Lab Accession#	External Order#
CULTURE, NASAL [134038]	LABMCNASCB	UNIVERSITY OF CHICAGO HOSPITALS LABORATORIES [1]	100011283	97705332	23U-097M0001	

- b. In the **Organism to be Speciated** field, enter the name of the organism or generic name of the organism(s) you want speciated (ex: Gram positive bacilli, *Corynebacterium* species, etc.)
- c. In the **Provider Contact/Pager Number**, enter a contact number for yourself or a member of your team so if the Micro lab has questions about the request, they can easily reach you.

5. Click  **Accept**
6.  **Sign** the order.

Viewing the Status of your Add-On

1. In Chart Review, the status of the Miscellaneous Micro Add-On will update based on when the lab acknowledges the order. When the order is first placed, the status will be listed as **Active**.

	Today at 4:03 PM	Miscellaneous Micro Speciation Ad...	Active
	Today at 4:02 PM	Miscellaneous Micro Susceptibility...	Active

2. Once the order is acknowledged by the lab staff, the order will transition into an **In Process** status.
3. The results for the requested speciation and/or susceptibility will appear on the original culture order.

Epic Tip Sheet: Beaker Ordering Microbiology Speciation and Susceptibilities for Providers

Date	Summary of Revisions	User
5/22/23	New Tip Sheet	Steph Gillen

Epic Tip Sheet: Beaker and Dermatology Workflow

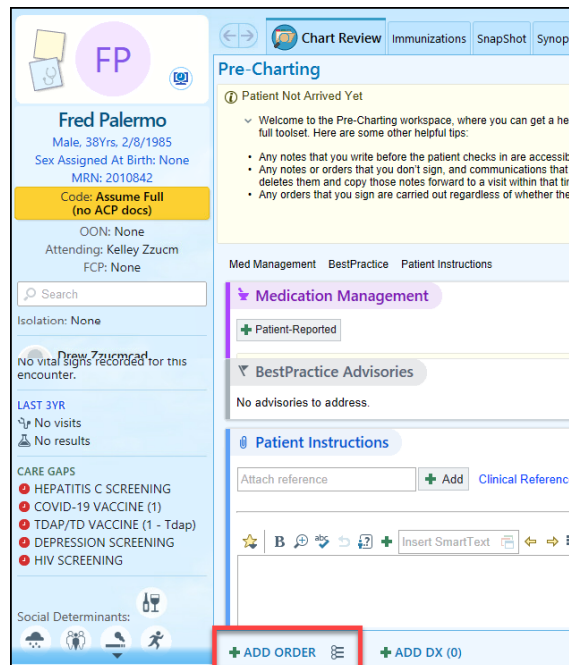
HPK - Dermatology

Summary

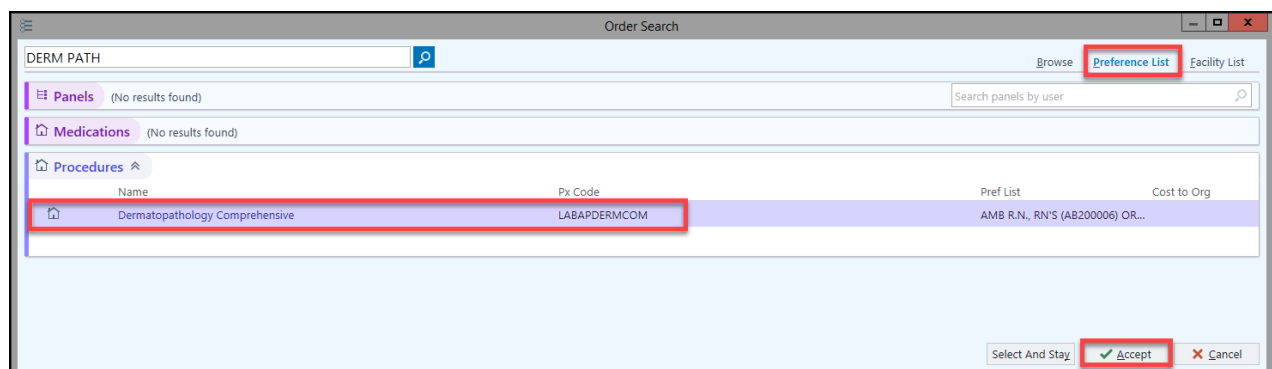
This tip sheet describes the Beaker workflow for clinicians who will be placing orders with a status of Normal (and printing labels) and Future, as well as clinic staff who will be completing specimen collection documentation.

Step-by-Step: Place Order with a Status of Normal

1. From the Schedule startup activity, double-click on your patient to open the encounter.
2. Select the **Add Order** button (or preference list icon) located in the Visit Taskbar at the bottom of the screen.



3. In the search box, type “derm path” and press Enter.
4. Select the Dermatopathology Comprehensive order, then select **Accept** to generate the order composer.



Epic Tip Sheet: Beaker and Dermatology Workflow HPK - Dermatology

5. In the order composer window, ensure that the status is set to **Normal** and the class is set to **Unit Collect/Clinic Collect**.
6. Select the **SPECIMEN A** button (and additional specimen buttons as necessary) to open mandatory documentation prompts.

IMPORTANT: For each specimen that you select, you **MUST** use the free-text Comments field located on the right-hand side of the “Site of Lesion” prompt to document information regarding the site from which the specimen was obtained.

The screenshot shows the 'Dermatopathology Comprehensive' window. At the top, the status is set to 'Normal' and the class is 'Unit Collect/Clinic Collect'. The 'SPECIMEN A' button is highlighted. The 'Site of Lesion' field is empty, and a red box highlights the 'Comments' field on the right, which contains the text: 'I have entered the specific site of lesion in the comments field following the 'Site of Lesion' field above'. Below this, there are checkboxes for 'Frozen?', 'PROSPECTIVE SPECIAL STAIN', and 'EVALUATE MARGINS?'. The 'History and Clinical Description' and 'Clinical Diagnosis' fields are also visible. At the bottom, there are buttons for 'SPECIMEN B' through 'SPECIMEN G' and 'Next Required'.

7. Select **Accept**.
8. Select **Sign Orders**.
 - a. A pop-up window will appear for you to link a diagnosis. After linking a diagnosis, another pop-up window will appear for you to specify the **Order Mode**, **Ordering Provider**, and **Authorizing Provider**.

IMPORTANT: Since this order has a status of **Normal**, it will immediately be released upon signing the order, and the specimen labels will print automatically.

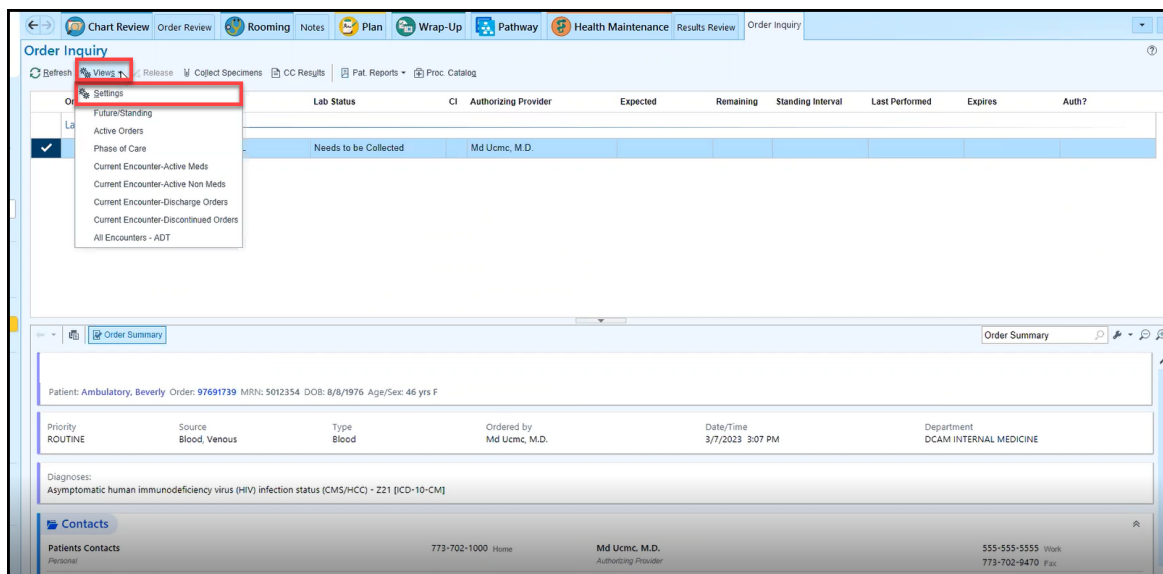
Epic Tip Sheet: Beaker and Dermatology Workflow

HPK - Dermatology

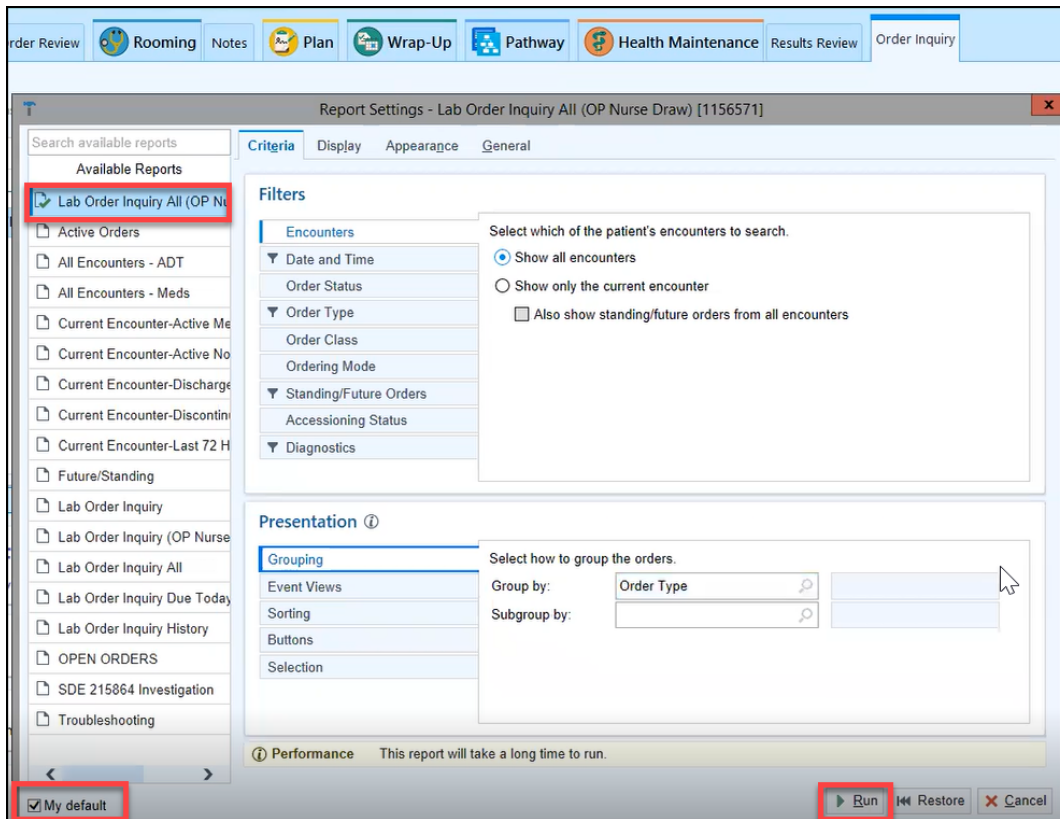
Step-by-Step: Clinic Staff - Collect Specimen and Document Specimen Collection

1. In the patient's encounter, navigate to the Order Inquiry activity.
 - a. If you do NOT see this activity, it may be hidden in the More Activities dropdown menu located on the right-hand side of the screen. Make it a favorite by clicking the **star** to the right of the activity name.

IMPORTANT: A pop-up window may appear, allowing you to choose from a list of orders to view. If your orders do NOT appear (or the pop-up window does not appear), select the **Views** button located in the toolbar > select **Settings** > select the **Lab Order Inquiry All** report > check the **My Default** checkbox > select **Run**.



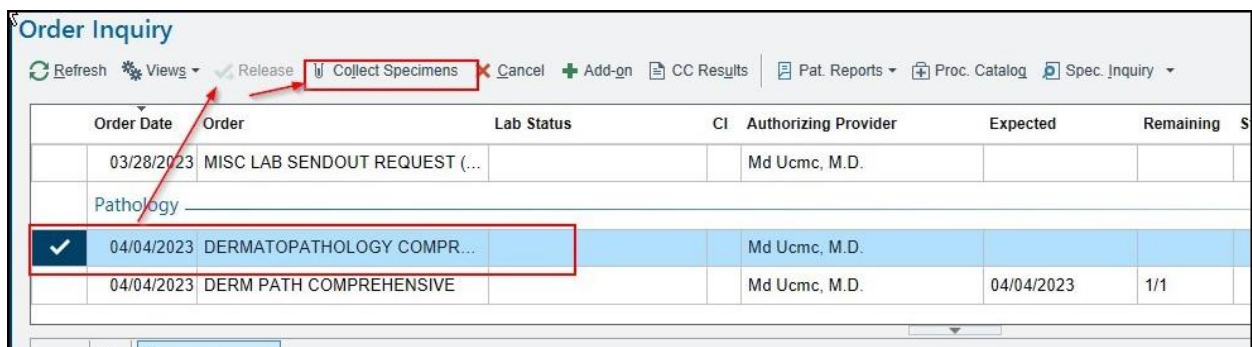
Epic Tip Sheet: Beaker and Dermatology Workflow HPK - Dermatology



2. Select your order if it is not already selected.

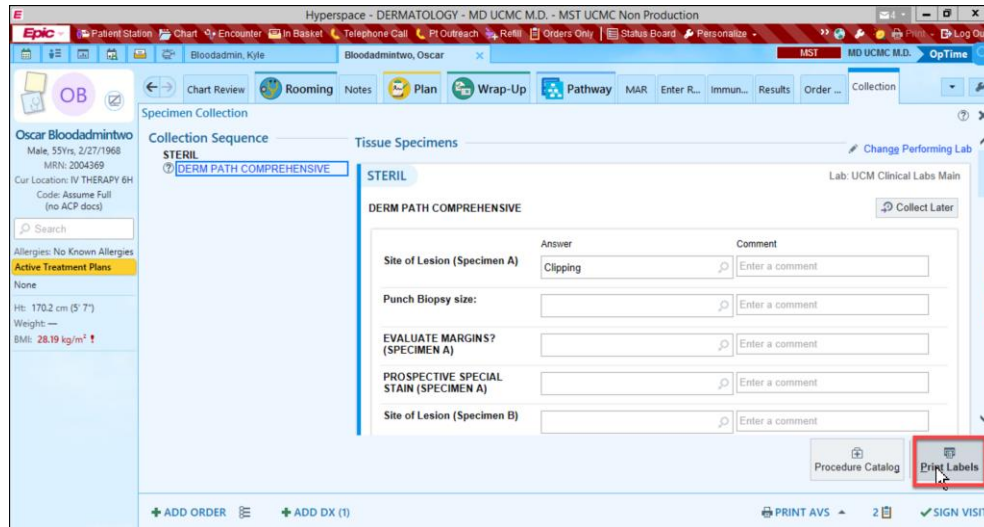
NOTE: You may need to unselect other orders that may appear checked and are irrelevant to this particular specimen collection.

IMPORTANT: Make note of whether or not the **Release** button in the toolbar is greyed out. If it is greyed out, it implies that the order status was set to **Normal**, and therefore, the label will have automatically printed upon signing the order. Proceed by selecting the **Collect Specimens** button. If the **Release** button is *active*, it implies that the order status was set to **Future**. Therefore, you must select the **Release** button **PRIOR** to selecting the **Collect Specimens** button.

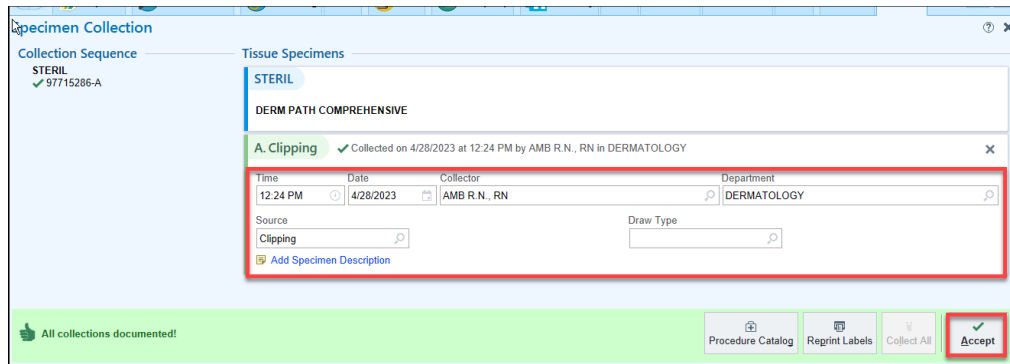


Epic Tip Sheet: Beaker and Dermatology Workflow HPK - Dermatology

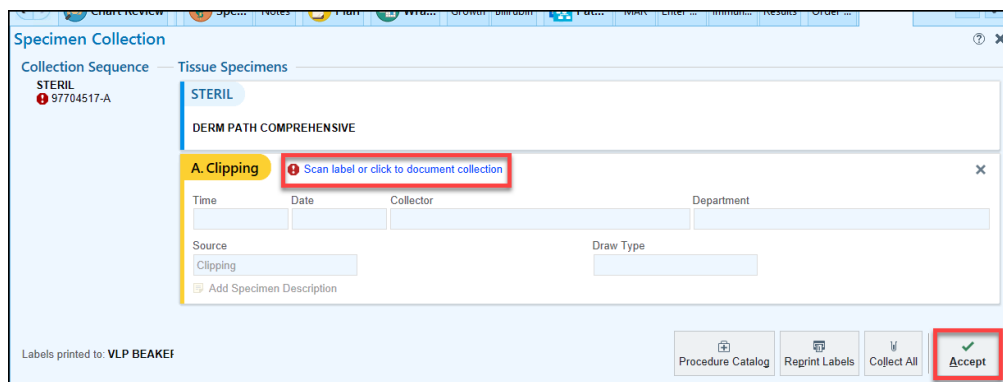
3. Select **Print Labels**.



- 4. Scan the patient label (i.e., the recommended workflow).
 - a. The collection date and time will auto-populate in the specimen collection fields.



IMPORTANT: If the scanner is missing or malfunctioning, select the [Scan label or click to document collection](#) link and specify a reason for not scanning (in the pop-up window that appears). The collection date and time will auto-populate in the specimen collection fields. The fields can be modified, but **MUST** be completed.



Epic Tip Sheet: Beaker and Dermatology Workflow

HPK - Dermatology

5. Select **Accept**.

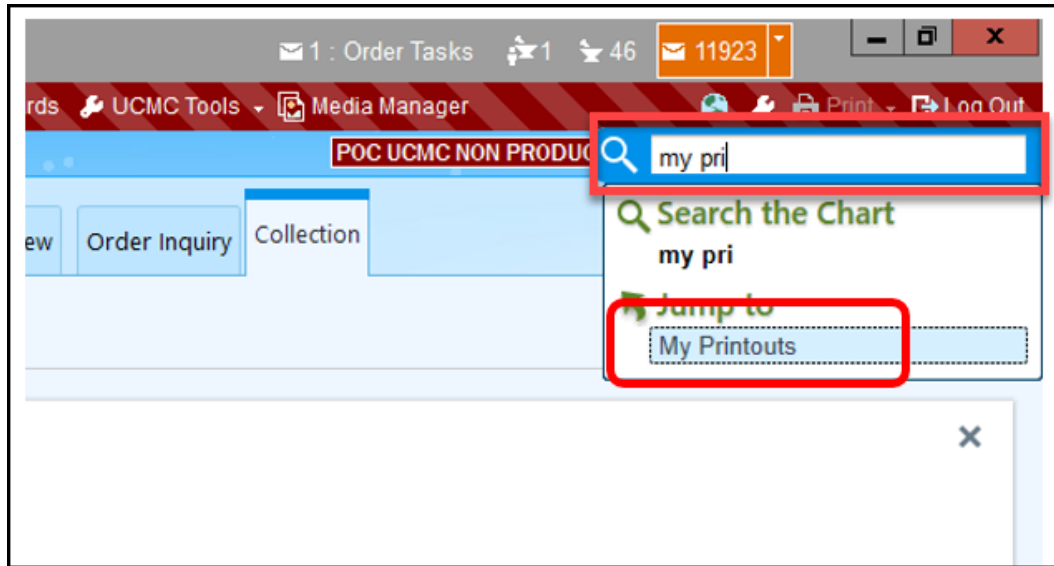
IMPORTANT: If your label does NOT print from the specimen label printer, refer to the “reprint” steps on the following page to reselect a printer and reprint a label.

Epic Tip Sheet: Beaker and Dermatology Workflow

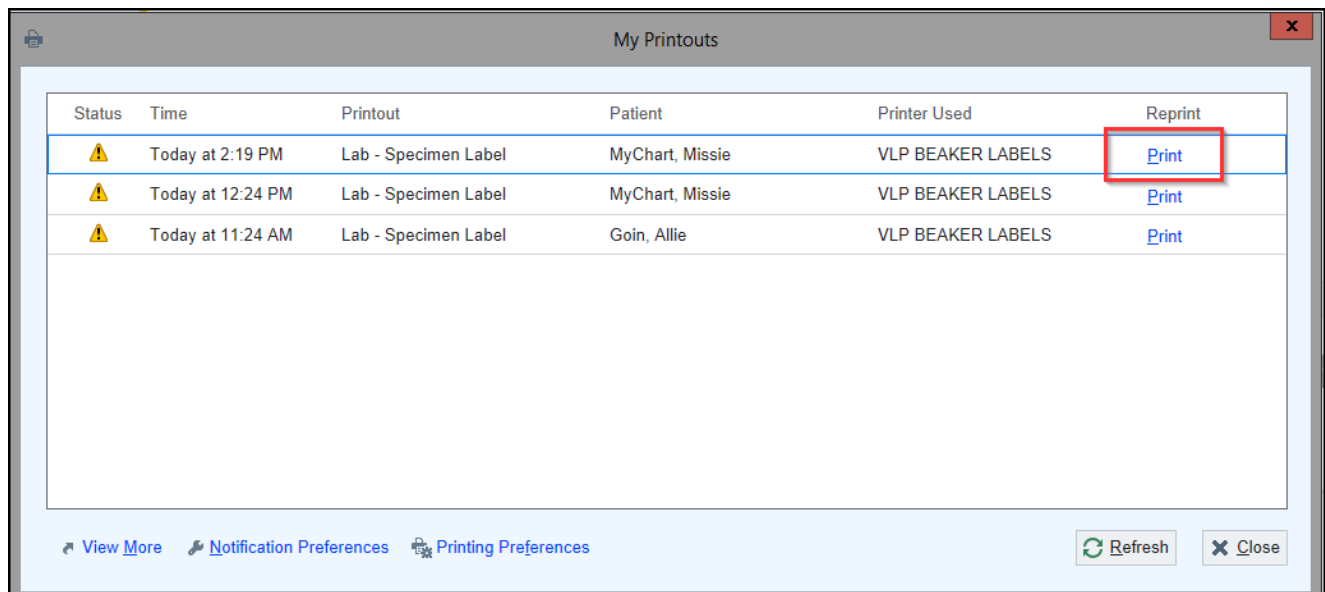
HPK - Dermatology

Step-by-Step: Reprint a Label (or Reselect a Printer)

1. Use Chart Search to lookup “my printouts”.



2. Select the [Print](#) hyperlink next to the appropriate label.



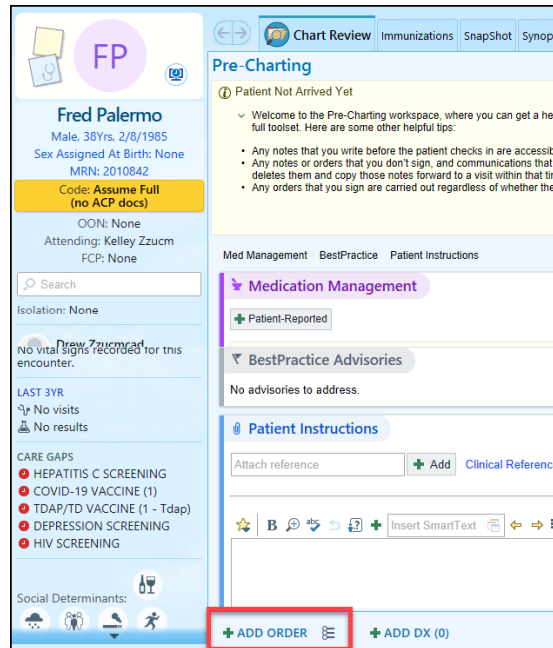
Status	Time	Printout	Patient	Printer Used	Reprint
⚠	Today at 2:19 PM	Lab - Specimen Label	MyChart, Missie	VLP BEAKER LABELS	Print
⚠	Today at 12:24 PM	Lab - Specimen Label	MyChart, Missie	VLP BEAKER LABELS	Print
⚠	Today at 11:24 AM	Lab - Specimen Label	Goin, Allie	VLP BEAKER LABELS	Print

IMPORTANT: When the printer selection pop-up window appears, ensure that the selected printer matches the *full* name that appears on the specimen label printer’s sticker. Pay particularly close attention to the last few characters.

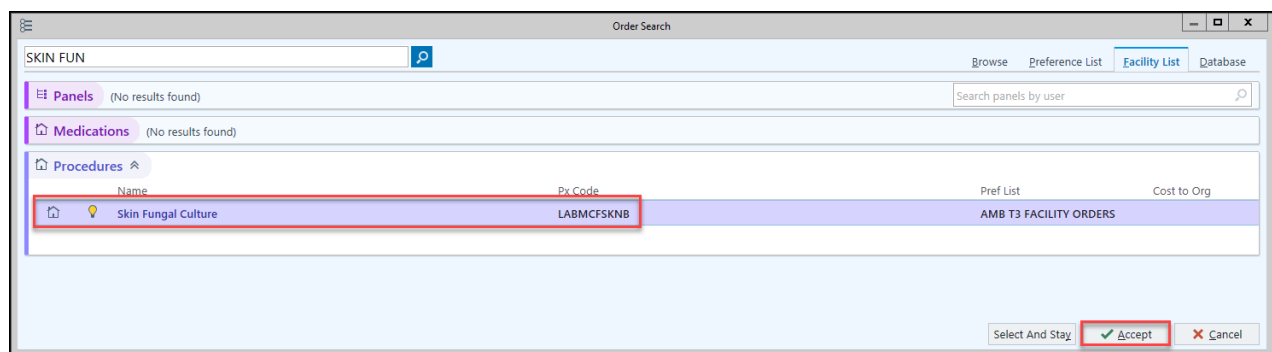
Epic Tip Sheet: Beaker and Dermatology Workflow HPK - Dermatology

Step-by-Step: Place Order with a Status of Future

1. From the Schedule startup activity, double-click on your patient to open the encounter.
2. Click the **Add Order** button (or preference list icon) located in the Visit Taskbar at the bottom of the screen.



3. In the search box, type “skin fun” and press Enter.
4. Select the Skin Fungal Culture order, then click **Accept** to generate the order composer.



5. In the order composer window, ensure that the status is set to **Future** and the class is set to **Unit Collect/Clinic Collect**.

Epic Tip Sheet: Beaker and Dermatology Workflow HPK - Dermatology

6. Address any hard stops and fill in other pertinent information as necessary.

The screenshot shows the Epic 'Skin Fungal Culture' order entry form. The 'Status' field is set to 'Future'. The 'Expected Date' is 4/13/2023. The 'Expires' date is 10/13/2023. The 'Class' is 'Unit Collect/Clinic Collect'. The 'Specimen' is 'Skin'. The 'Specimen Src' field is highlighted with a red box. The 'Lab' field is empty. The 'Resulting Agency' is empty. The 'Collection Date' and 'Collection Time' are empty. The 'Comments' field has a '+ Add Comments (F6)' button. The 'Sched Inst' field has a '+ Add Scheduling Instructions' button. The 'Performing Dept' field is empty. The 'Add-on' field shows 'No add-on specimen found'. The bottom of the form has a 'Next Required' button and 'Accept' and 'Cancel' buttons.

7. Select **Accept**.

8. Select **Sign Orders**.

- a. A pop-up window will appear for you to link a diagnosis. After linking a diagnosis, another window will appear for you to specify the **Order Mode**, **Ordering Provider**, and **Authorizing Provider**.

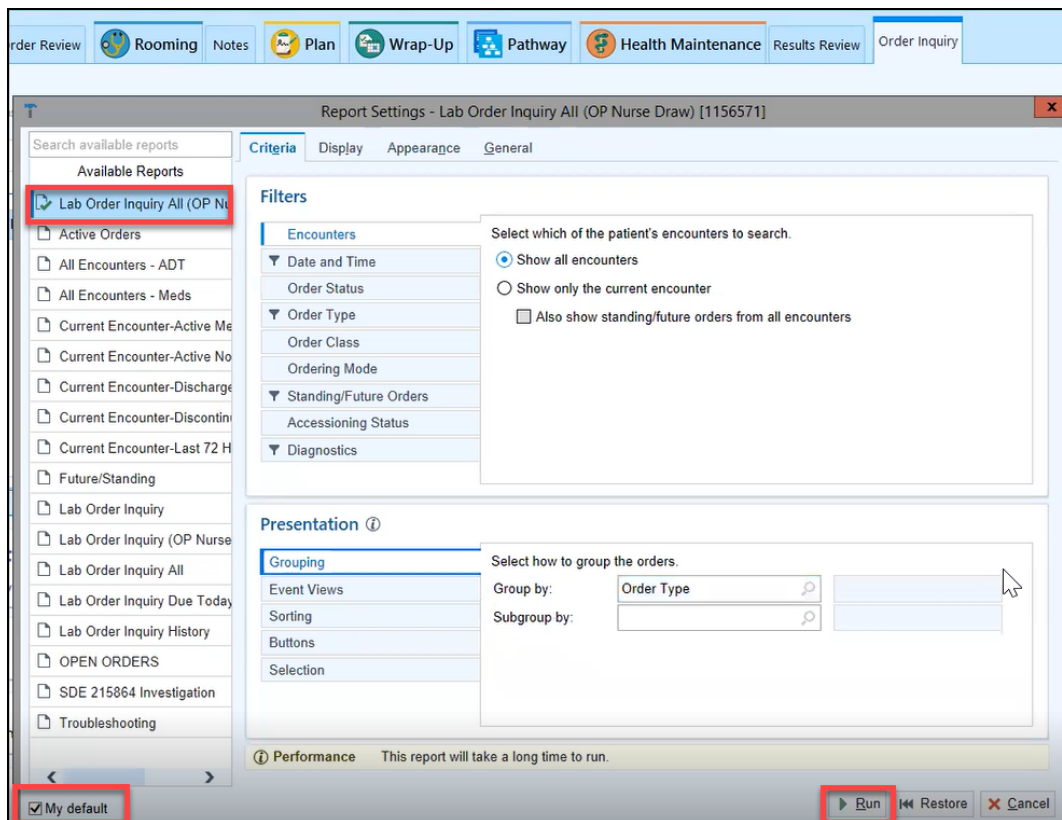
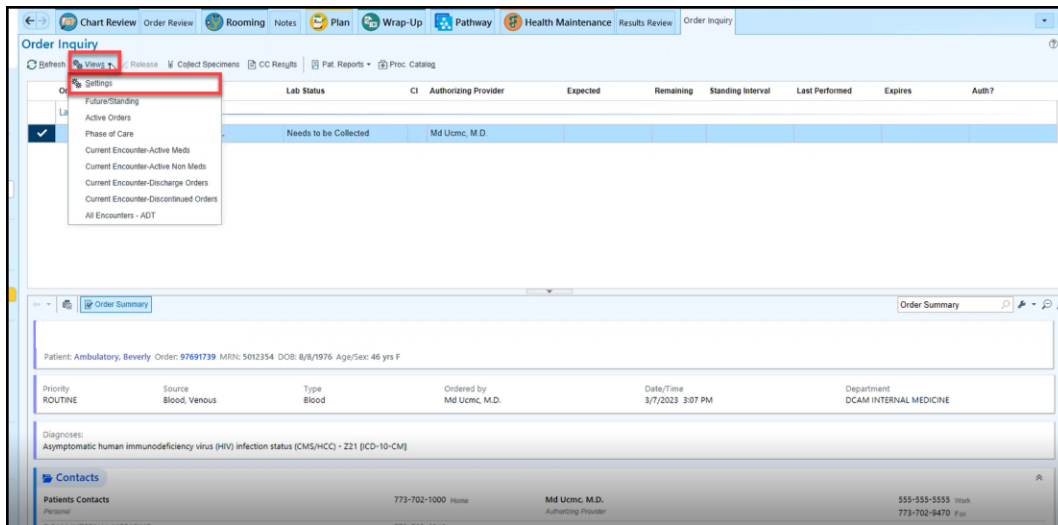
IMPORTANT: Since this order has a status of **Future**, it will NOT be automatically released upon signing the order. The clinic staff must manually release the order from the Order Inquiry activity before completing specimen collection documentation and specimen label printing (as described below).

Step-by-Step: Release Order, Collect Specimen, Document, and Print Specimen Label

1. In the patient's encounter, navigate to the Order Inquiry activity.
 - a. If you do NOT see this activity, it may be hidden in the More Activities dropdown menu located on the right-hand side of the screen. Make it a favorite by clicking the **star** to the right of the activity name.

IMPORTANT: A pop-up window may appear, allowing you to choose from a list of orders to view. If the pop-up window does not appear, select the **Views** button located in the toolbar > select **Settings** > select the **Lab Order Inquiry All** report > check the **My Default** checkbox > select **Run**.

Epic Tip Sheet: Beaker and Dermatology Workflow HPK - Dermatology



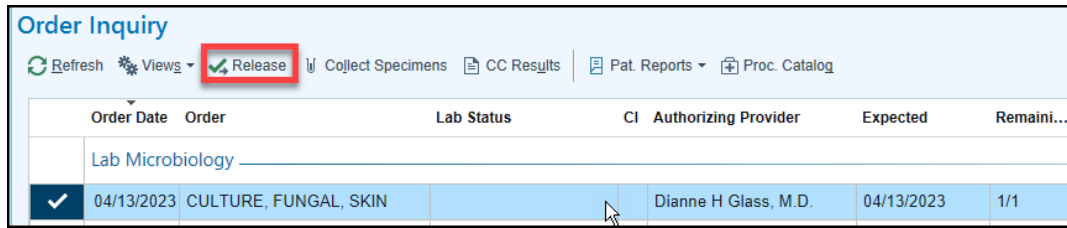
IMPORTANT: Notice that the **Release** button in the toolbar is active. This implies that the order status was set to **Future**.

1. Select your Skin Fungal Culture order if it is not already selected.

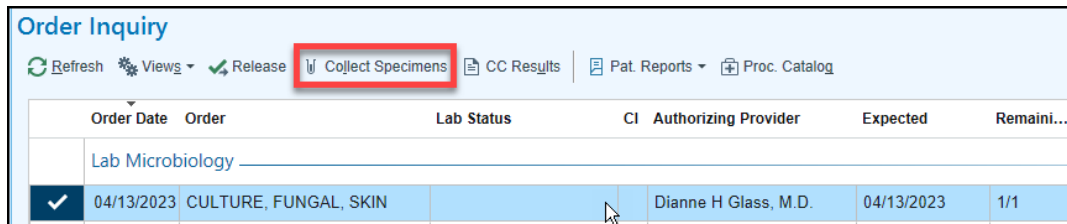
NOTE: You may need to unselect other orders that may appear checked and are irrelevant to this particular specimen collection.

Epic Tip Sheet: Beaker and Dermatology Workflow HPK - Dermatology

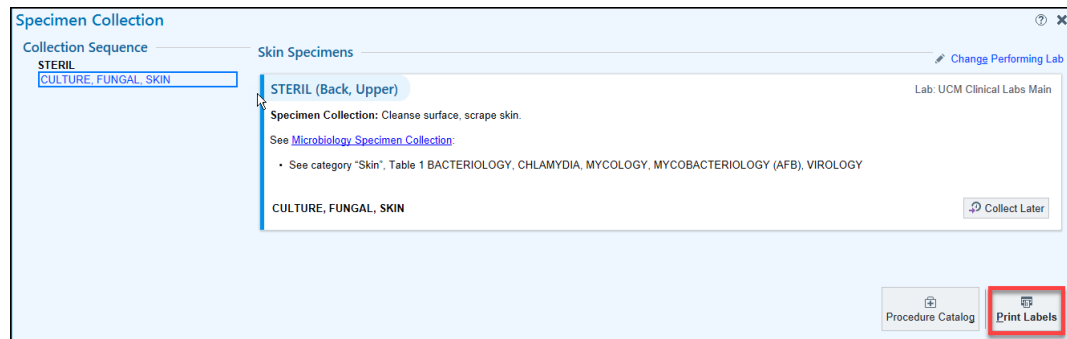
2. Select the **Release** button located in the toolbar.



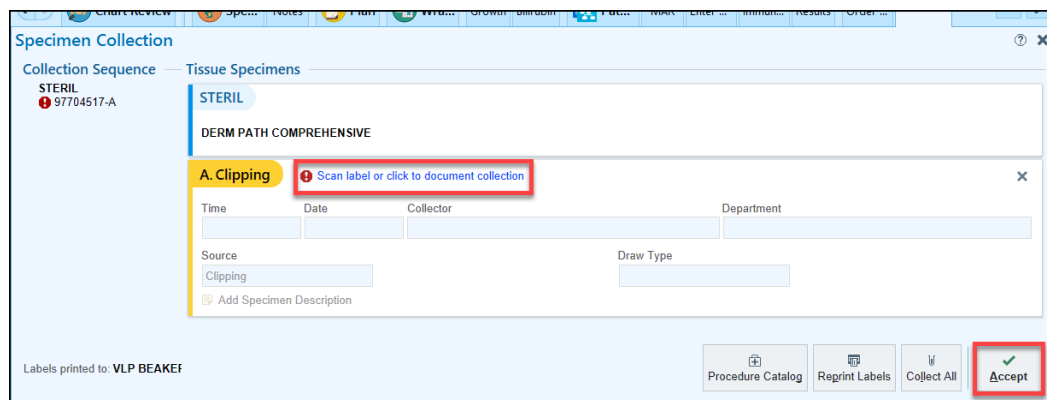
3. Select the **Collect Specimens** button located in the toolbar.



4. Verify the specimen collection details, then select **Print Labels**.



5. Scan the patient label.
a. If the scanner is missing or malfunctioning, select [Scan label or click to document collection](#).



6. Select **Accept**.

Epic Tip Sheet: Beaker and Dermatology Workflow HPK - Dermatology

Date	Summary of Revisions	User
4/4/23	Created	Andrea Goode and Gabby Gervasio
4/5/23	Revised	Andrea Goode and Gabby Gervasio
4/6/23	Revised	Andrea Goode and Gabby Gervasio
4/13/23	Revised	Gabby Gervasio
5/8/23	Revised	Gabby Gervasio

Epic Tip Sheet: AMB - Beaker Specimen Collection Documentation, Printing, and Reprinting Workflow

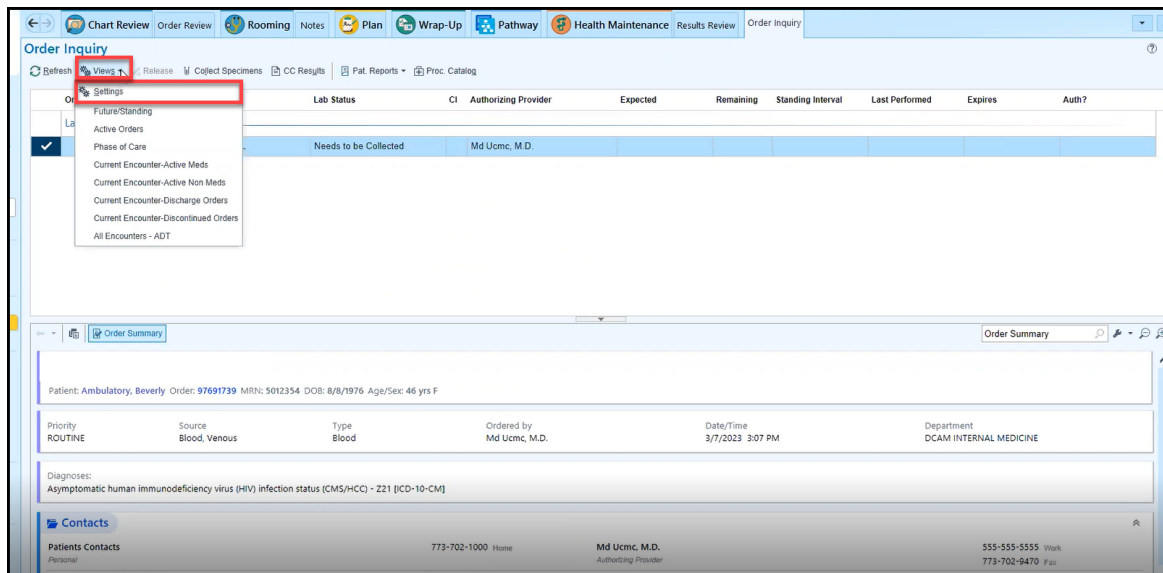
Summary

This tip sheet describes the Beaker workflow for clinical staff who will be completing specimen collection documentation, printing labels, and reprinting labels if needed.

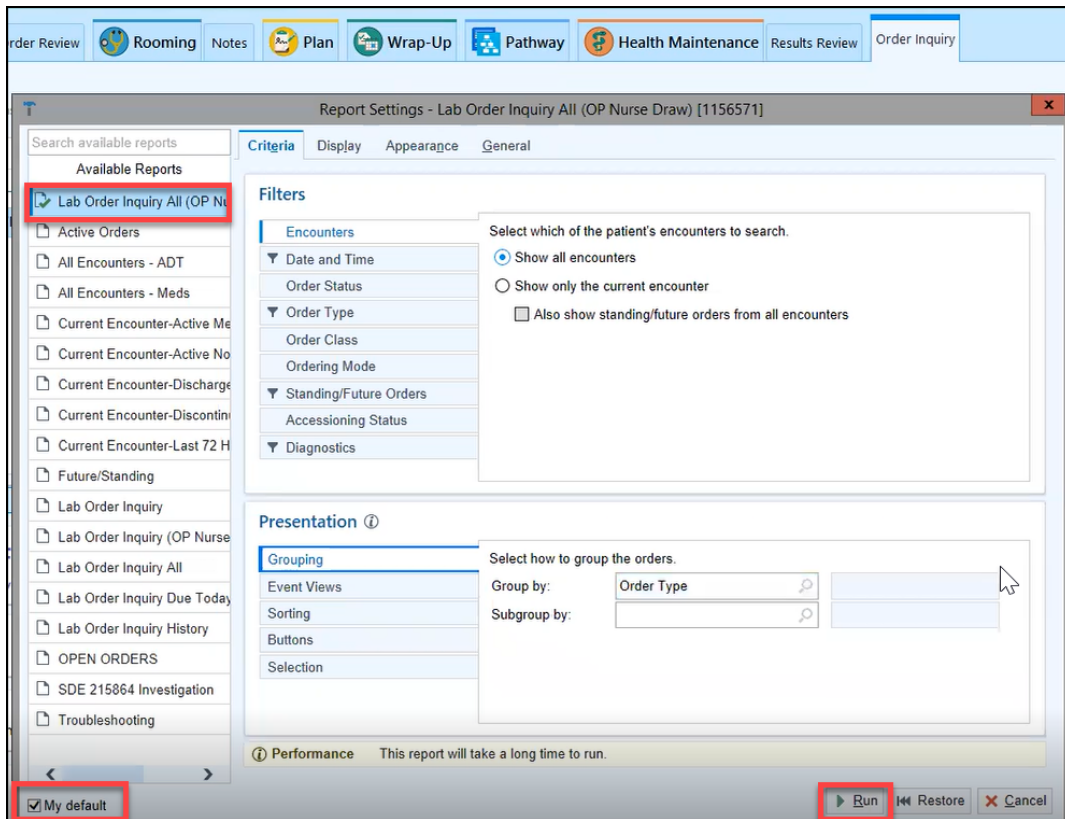
Step-by-Step: Collect Specimen and Document Collection After Order Has Been Placed

1. In the patient's encounter, navigate to the Order Inquiry activity.
 - a. If you do NOT see this activity, it may be hidden in the More Activities dropdown menu located on the right-hand side of the screen. Make it a favorite by clicking the **star** to the right of the activity name.

IMPORTANT: A pop-up window may appear, allowing you to choose from a list of orders to view. If your orders do NOT appear (or the pop-up window does not appear), select the **Views** button located in the toolbar > select **Settings** > select the **Lab Order Inquiry All** report > check the **My Default** checkbox > select **Run**.



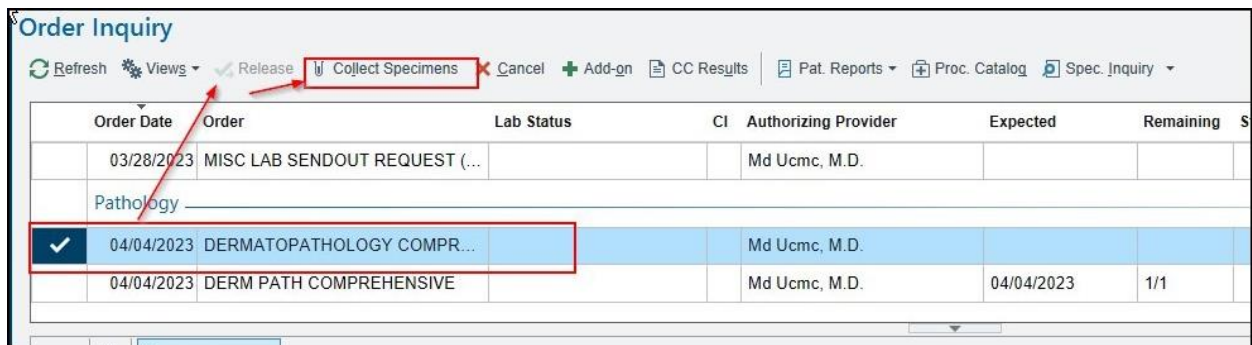
Epic Tip Sheet: AMB - Beaker Specimen Collection Documentation, Printing, and Reprinting Workflow



2. Select your order if it is not already selected.

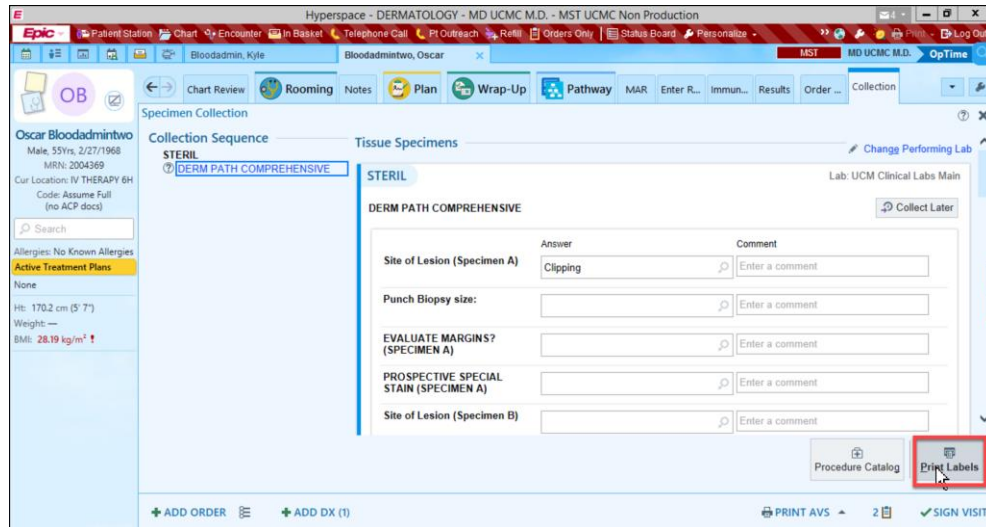
NOTE: You may need to unselect other orders that may appear checked and are irrelevant to this particular specimen collection.

IMPORTANT: Make note of whether or not the **Release** button in the toolbar is greyed out. If it is greyed out, it implies that the order status was set to **Normal**, and therefore, the label will have automatically printed upon signing the order. Proceed by selecting the **Collect Specimens** button. If the **Release** button is *active*, it implies that the order status was set to **Future**. Therefore, you must select the **Release** button **PRIOR** to selecting the **Collect Specimens** button.

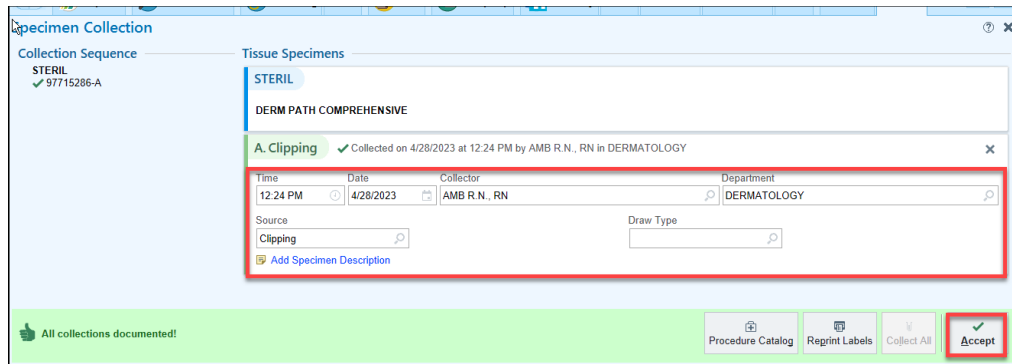


Epic Tip Sheet: AMB - Beaker Specimen Collection Documentation, Printing, and Reprinting Workflow

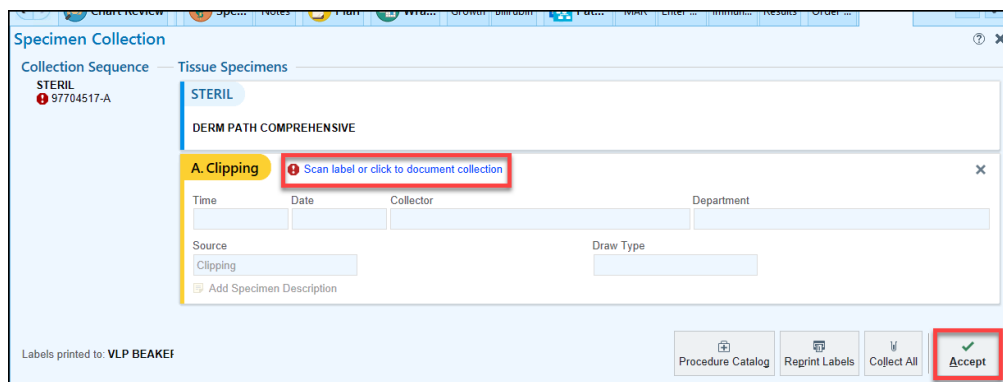
3. Select **Print Labels**.



- 4. Scan the patient label (i.e., the recommended workflow).
 - a. The collection date and time will auto-populate in the specimen collection fields.



IMPORTANT: If the scanner is missing or malfunctioning, select the [Scan label or click to document collection](#) link and specify a reason for not scanning (in the pop-up window that appears). The collection date and time will auto-populate in the specimen collection fields. The fields can be modified, but **MUST** be completed.



Epic Tip Sheet: AMB - Beaker Specimen Collection Documentation, Printing, and Reprinting Workflow

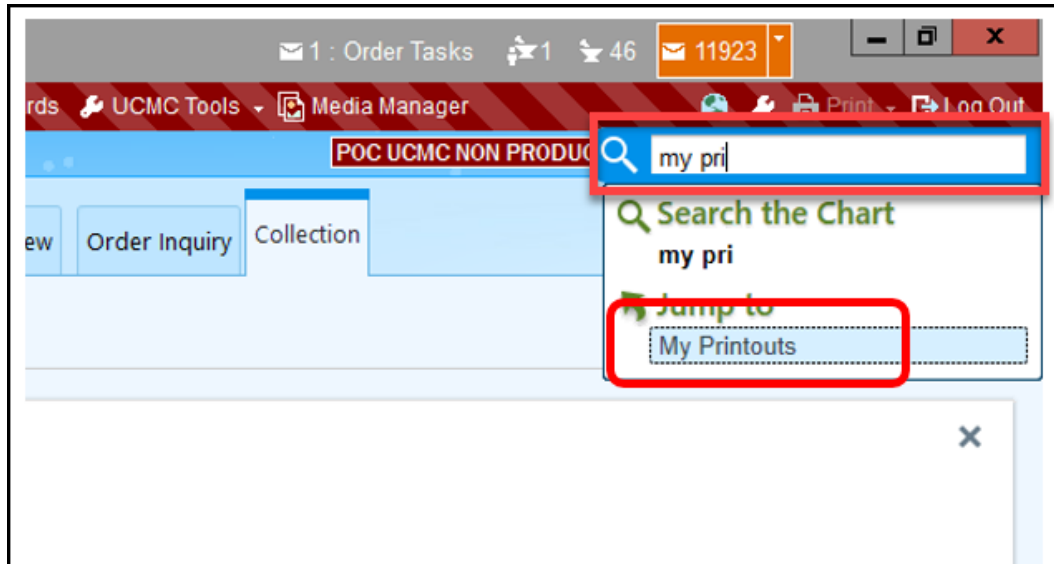
5. Select **Accept**.

IMPORTANT: If your label does NOT print from the specimen label printer, refer to the “reprint” steps on the following page to reselect a printer and reprint a label.

Epic Tip Sheet: AMB - Beaker Specimen Collection Documentation, Printing, and Reprinting Workflow

Step-by-Step: Reprint a Label (or Reselect a Printer)

1. Use Chart Search to lookup “my printouts”.



2. Select the [Print](#) hyperlink next to the appropriate label.

Status	Time	Printout	Patient	Printer Used	Reprint
⚠	Today at 2:19 PM	Lab - Specimen Label	MyChart, Missie	VLP BEAKER LABELS	Print
⚠	Today at 12:24 PM	Lab - Specimen Label	MyChart, Missie	VLP BEAKER LABELS	Print
⚠	Today at 11:24 AM	Lab - Specimen Label	Goin, Allie	VLP BEAKER LABELS	Print

View More Notification Preferences Printing Preferences Refresh Close

IMPORTANT: When the printer selection pop-up window appears, ensure that the selected printer matches the *full* name that appears on the specimen label printer’s sticker. Pay particularly close attention to the last few characters.

Epic Tip Sheet: AMB - Beaker Specimen Collection Documentation, Printing, and Reprinting Workflow

Date	Summary of Revisions	User
4/28/23	Created	Gabby Gervasio
5/8/23	Revised	Gabby Gervasio

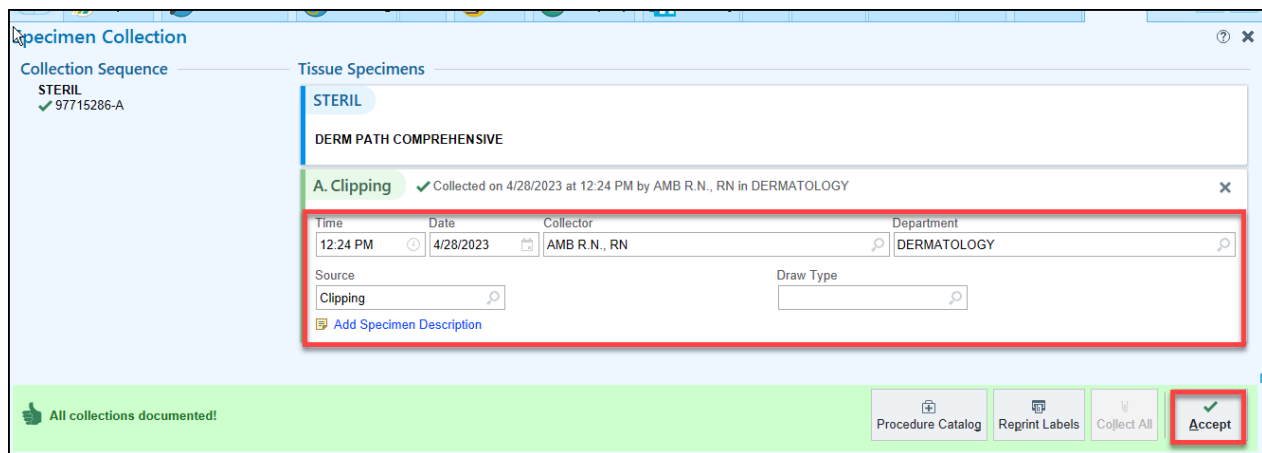
Epic Tip Sheet: Just-In-Time Reminder - Epic Beaker Go-Live For Laboratory Specimen Collection

Summary

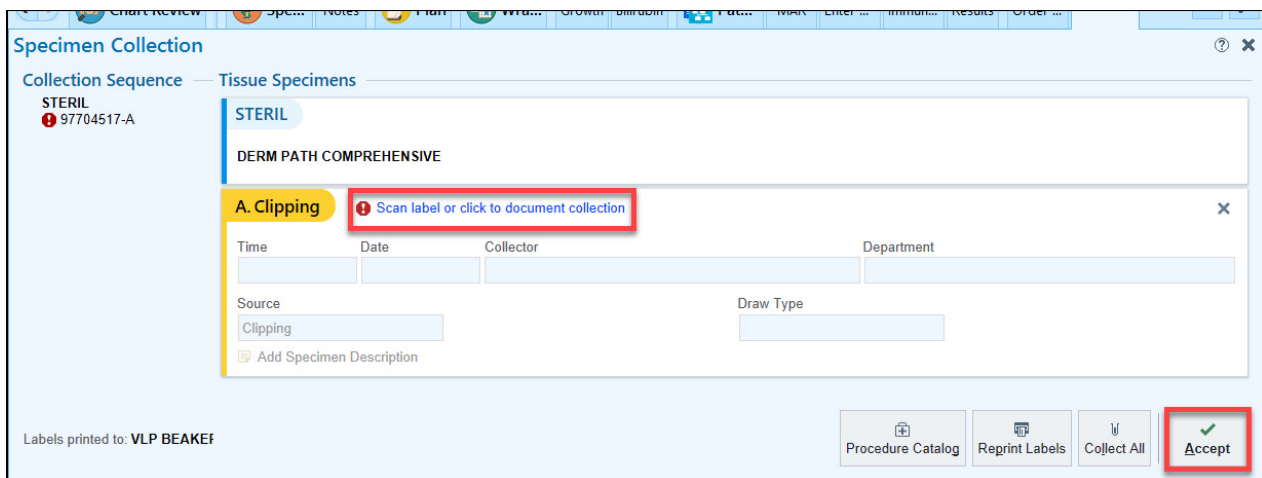
All personnel collecting any type of laboratory specimens from all locations must follow the new Epic workflow outlined in the attached tip sheet using a scanner and specimen label printer. All of the collection information **MUST** be completed prior to sending the specimens to the laboratory. Do not bypass this process with the use of a chart label. If any of the collection information is missing or a chart label is used, results including a critical value will not post to the patient chart until missing information is corrected. To avoid any delay with result availability, please make sure to follow the process outlined starting 4/29/23 03:00am.

Step-by-Step: Document Specimen Collection

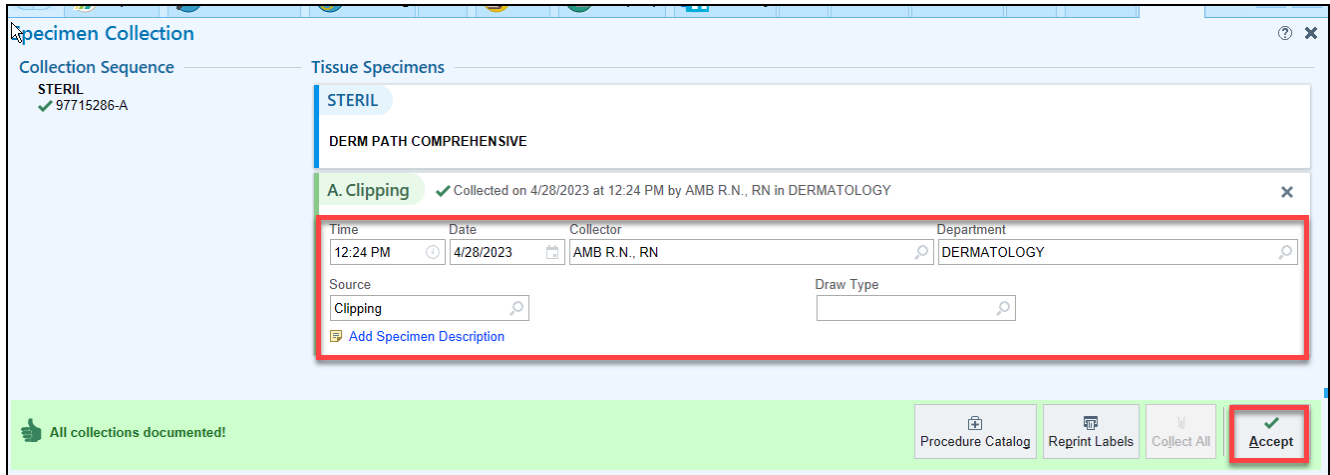
1. Scan the specimen label (i.e., the recommended workflow).
 - a. The collection date and time will auto-populate in the specimen collection fields.



IMPORTANT: If the scanner is missing or malfunctioning, select the [Scan label or click to document collection](#) link and specify a reason for not scanning (in the pop-up window that appears). The collection date and time will auto-populate in the specimen collection fields. The fields can be modified, but **MUST** be completed.



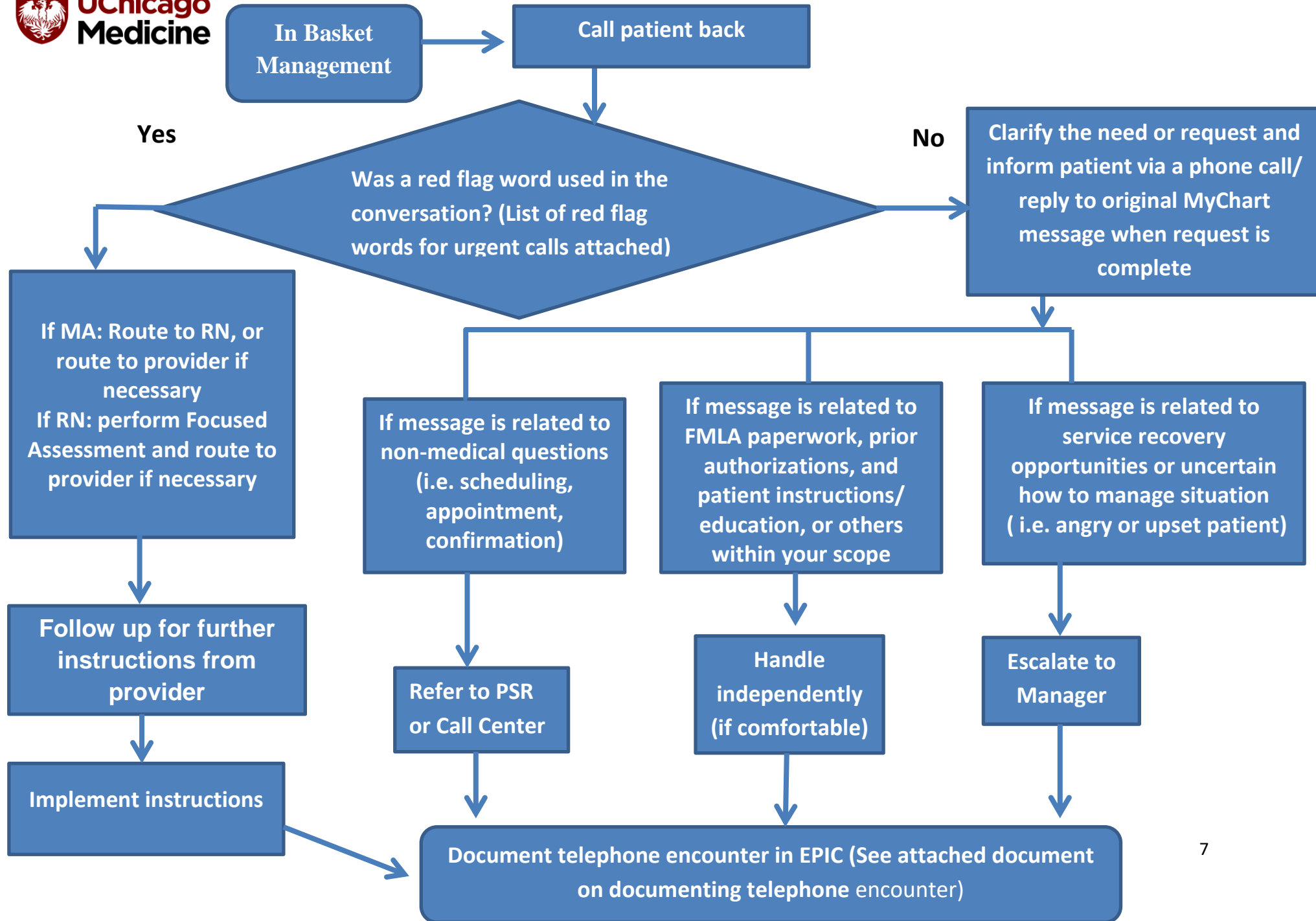
Epic Tip Sheet: Just-In-Time Reminder - Epic Beaker Go-Live For Laboratory Specimen Collection



2. Select **Accept**.

Epic Tip Sheet: Just-In-Time Reminder - Epic Beaker Go-Live For Laboratory Specimen Collection

Date	Summary of Revisions	User
4/28/23	Created	Gabby Gervasio



Work Sequence – Blood Pressure Measurement technique

A. Preparing and Positioning of Patient

1. Perform hand hygiene before patient contact
2. Verify correct patient using two identifiers (Name and date of birth)
3. Determine previous baseline, if available
4. Allow patient to rest for 3 minutes before taking BP
5. Back is supported and feet are flat on the floor
6. Legs are not crossed
7. Patient and health care provider should not be talking during measurement

B. Choose the appropriate cuff size

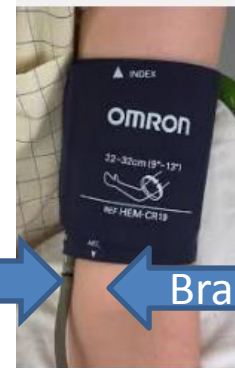
1. Cuff size is determined by circumference of arm
2. Correctly identify the measuring line and explain the significance
3. Choose the correct cuff size based on arm circumference

C. Choose the appropriate arm

1. Do not use same arm as dialysis shunt, mastectomy, or weakness from stroke

D. Proper Technique

1. Arm is bare or covered by thin, smooth garment – do not take BP over sweaters, bulky garments or rolled up shirts
2. Support the patient arm in your arm or on a flat surface
at heart level with palm facing up
3. Wrap the cuff around the arm, 2 fingers breadth above elbow
4. Position the bladder over the brachial artery



Blood Pressure Measurement Standard Work

Process Owner: **Practice Manager**

Department: Primary Care Practice

Revision Date: 1/8/2019

Work Sequence – Blood Pressure Measurement Technique

E. Proper Technique

5. For automatic measurement, activate automatic cuff.

Repeat if systolic BP is ≥ 140 or diastolic BP is ≥ 90 mm Hg after letting patient rest for minimum of 5 minutes

6. For manual measurement:

- a. Tighten the stopcock
- b. Pump the pressure up to 160-180mmHg or 30 mmHg above patient's previously documented systolic pressure
- c. Position stethoscope over brachial artery
- d. Loosen the stopcock slowly (2-3mmHG/second)



7. Note the pressure at which the first sound is heard, this is the systolic BP

8. Note the pressure at which the last sound is heard, this is the diastolic BP

9. Report abnormal values:

If systolic BP is ≥ 140 or diastolic BP is ≥ 90 mm Hg remains elevated, provider is notified.

If systolic BP is ≥ 180 or diastolic BP is ≥ 100 , provider is text paged with the result.

10. Record BP in the vitals sign section of the electronic medical record.

Phone Triage

Review list of red flag words
(List of red flag words for urgent calls
attached)

Yes

Did patient use a red flag
word during the call?

No

If MA: Route to RN, or route
to provider if necessary
If RN: Perform focused
Assessment and escalate to
provider if necessary

Follow up for further
instructions from
providers

Implement
instructions

Calls related to
non-medical
questions -
scheduling,
appointment,
confirmation,

Refer to PSR
or Call Center

Calls related FMLA
Paperwork, Prior
Authorizations, and
Patient Instructions/
education, or others
within your scope

Handle
independently
(if comfortable)

Service Recovery
Opportunities or
uncertain how to
manage situation
(i.e. Angry or upset
patient)

Escalate to
Manager

Document telephone encounter in EPIC (See attached document
on documenting telephone encounter)

Red Flag Words

Red Flag Words	Common complaints or follow up questions to ask
Abdominal Pain	Severe, 7 or higher on a scale of 1 – 10
Allergic Reaction	Acute, when did it onset, what interventions/medications have been tried
Back Pain	Severe, 7 or higher on a scale of 1 – 10, when did it onset, is it related to trauma, what interventions/medications have been tried
Bleeding	Severe, how long has the bleeding been going on for, what interventions have been tried, applied pressure for 20 minutes without peaking, light-headedness
Breathing	Shortness of breath, difficulty breathing, can't get enough air, wheezing, light-headedness
Chest Pain	Tightness, pressure, palpitations, squeezing, heaviness, fluttering, "elephant sitting on my chest", impending sense of doom, when did it onset, what makes it worse or better
Confusion	Sudden onset within the past month, can't remember things that were discussed, unclear speech patterns or misusing words
Fainting	Passed out, syncope, fell and can't remember how
Depression	New or Worsening, loss of emotions, can't feel joy, sleeping more, thoughts of harming others or self-harm
Dizzy	Difficulty focusing, blurry vision, vertigo
Eye injuries/trauma	Eye pain, discomfort, swelling, redness, tenderness, itching, object in eyes, tears/tearing, seeing spots
Fever	Above 103
Fracture	Obvious/Probable, broken limb, pain, can't move the limb
Heartburn	With dizziness and/or nausea, difficulty swallowing, pain during meals
Headache	Severe/sudden onset "Worst headache in my life", pounding sensation, difficulty concentrating or thinking
Head injury	Trauma, falls, concussion, memory loss
Hives	Localized or generalized swelling, swelling in the head/face/neck/tongue, itching, what interventions have been tried
Hypertension/ Hypotension	Blood pressure readings, history of similar symptoms, dizziness, headaches, fatigue/tiredness
Lip swelling	Trauma, pain, itching, can't move the lips, affected speech
Lightheaded	Dizziness, tired, spinning room, sleepy
Loss of consciousness	Passed out, syncope, fell and can't remember how
Numbness	Tingling, pain, sharp shooting pain, pins and needles, can't move or can't feel
Pregnant	Bleeding, Trauma of any sort or decreased baby movement
Surgery	Post-op vomiting, fever, wound problem, bleeding, severe pain, pus drainage from surgical site
Rash	New with fever, infected, painful, joint pain, on face, redness, itching
Seizure	Movement control loss, memory loss, fatigue, bowel or urinary dysfunction

Severe pain	General new or existing pain, 7 or higher on a scale of 1 – 10, description of pain (dull ache, sharp shooting pain, pounding, etc)
Speech	Slurred/difficulty pronouncing words or using words properly, made-up words
Suicidal	Thoughts or statements, new or worsening, changes in medications such as prednisone
Swallowing	Difficulty, drooling
Testicle	Pain and/or swelling
Tongue	Swelling, drooling, tenderness
Vision	Sudden loss, blurry vision, changes in vision, blind spots, spots in vision
Visiting Nurse	Home Health or Hospice nurse with new or worsening patient problem
Weakness	Loss of movement, one-sided or both-sided, sudden onset

Source: Crawley,R. & Kuchta,P. (Eds). Telehealth Nursing Practice Special Interest Group A Telehealth Manager's Toolkit. American Academy of Ambulatory Nurses (2011)

12 years and older previously vaccinated with 1 or more monovalent covid-19 vaccine

Age	Pfizer Covid-19 Bivalent Dosing regimen
12-64 years old	<ul style="list-style-type: none"> • Single dose of bivalent, 0.3mL <ul style="list-style-type: none"> ○ ≥ 2months after monovalent covid-19
≥ 65 years old	<ul style="list-style-type: none"> • Single dose of bivalent, 0.3mL <ul style="list-style-type: none"> ○ ≥ 2months after monovalent covid-19 • Additional dose 0.3 mL, authorized to be administered ≥ 4 months after 1st dose of bivalent

12 years and older not previously vaccinated with Covid-19

Age	Pfizer Covid-19 Bivalent Dosing regimen
12-64 years old	Single dose of bivalent, 0.3mL
≥ 65 years old	<ul style="list-style-type: none"> • Single dose of bivalent, 0.3mL • Additional dose 0.3 mL, authorized to be administered ≥ 4 months after 1st dose of bivalent

5-11 years old not previously vaccinated with Covid-19	
Age	Pfizer Covid-19 Bivalent Dosing regimen
5-11 years old	Single dose 0.2mL

5-11 years old previously vaccinated with 1 or more monovalent covid-19 vaccine	
Age	Pfizer Covid-19 Bivalent Dosing regimen
5-11 years old	Single dose, 0.2 mL \geq 2 months after monovalent Covid-19 vaccine

6 months – 4 years old not previously vaccinated with Covid-19 vaccine

Pfizer Covid-19 Bivalent doses	Dosing regimen
Dose 1	Week 0
Dose 2	Week 3
Dose 3	≥ 8 weeks after the second dose

6 months – 4 years old previously vaccinated with 1 or more monovalent covid-19 vaccine

Number of previous of Pfizer Covid-19	Dosing regimen
1 previous doses	Dose 1: 3 weeks after the Covid-19 vaccine Dose 2: ≥ 8 weeks after the dose 1
2 previous doses	Single dose: ≥ 8 weeks after the second dose of Pfizer Covid-19 was administered
3 previous doses	Single dose: ≥ 2 months after receiving the 3 rd dose of Pfizer Covid-19 vaccine

Influenza Immunization Screening and Vaccination Tip Sheet

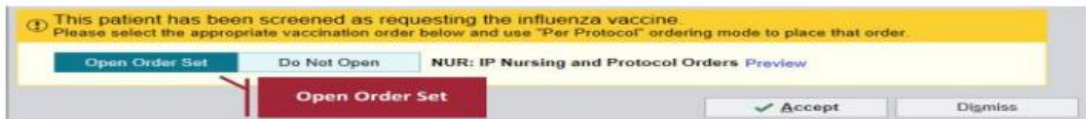
The Centers for Disease Control recommends everyone older than 6 months of age should get an influenza vaccination every flu season with some rare exceptions. Influenza can lead to hospitalizations and in some cases death. The UCMC influenza immunization policy facilitates an improvement in immunization rates and protection of our patient population.

EPIC Ordering Tips

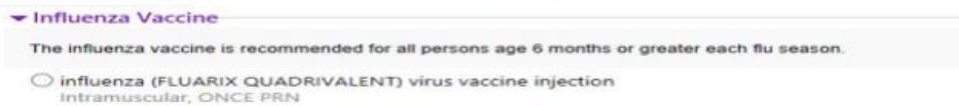
Per PC 129, if a patient has not received the flu vaccine and consents to receive one, RNs/LPNs/MAs can order and administer the influenza vaccine per protocol after screening for contraindication

To place a protocol order for the flu vaccine:

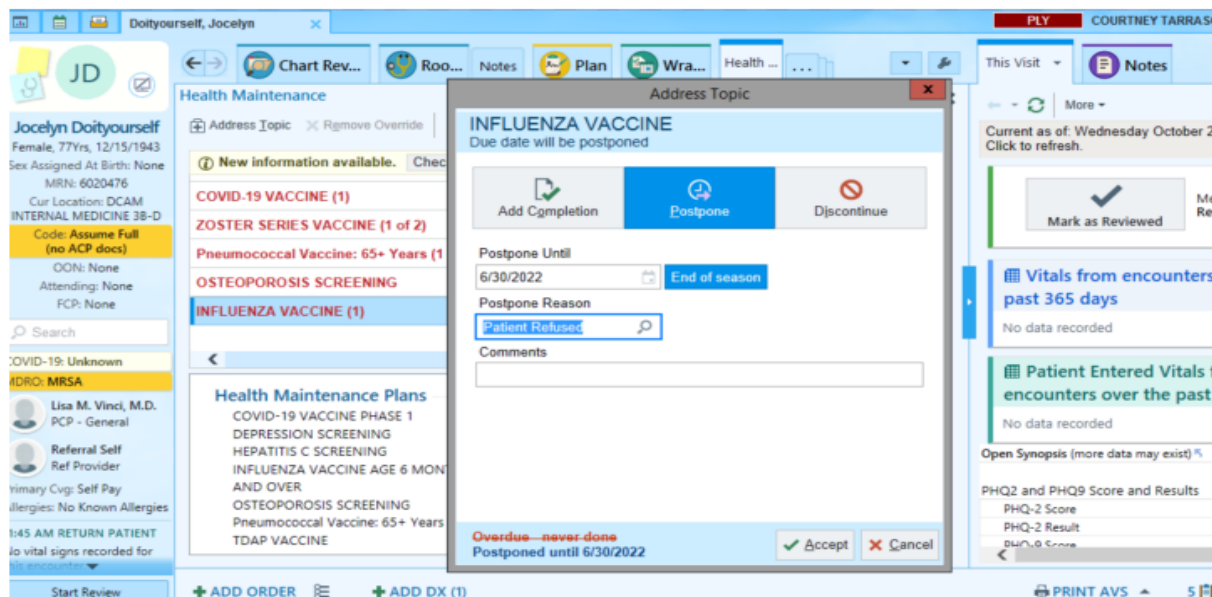
- A Best Practice Advisory (BPA) will appear. Click accept and the order set will open.



- The order set opens. Select the applicable order and sign.



UCMC clinical staff should offer the influenza vaccine to all eligible patients. If the patient declines the vaccine it is important to document the refusal in the Health Maintenance Tab of EPIC.

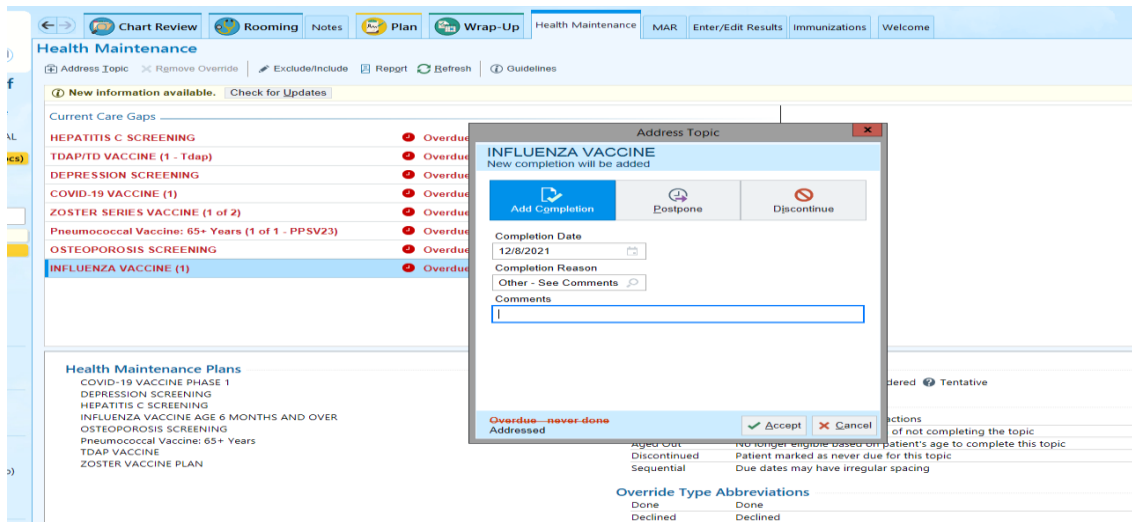


Documenting Influenza Vaccine Completion

Best Practice is for the patient to provide record on influenza vaccination.

Step 1 Record in Health Maintenance

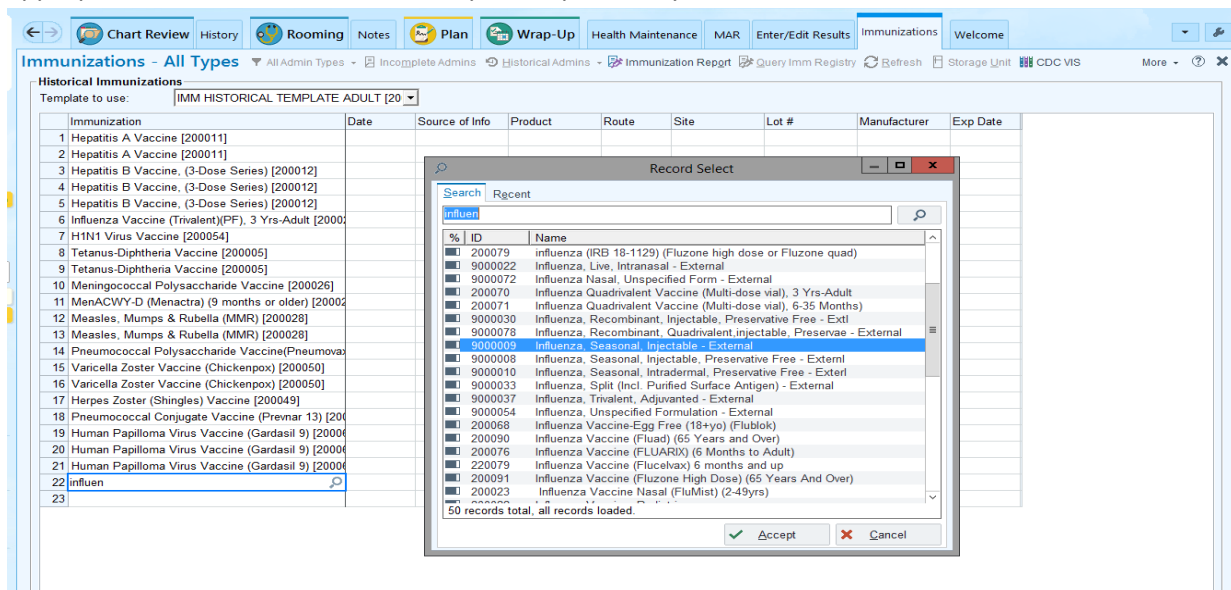
Log into the patient chart, go into health maintenance, and click on influenza vaccine to add completion reason as other.



The screenshot shows the 'Health Maintenance' tab in a patient chart. A list of 'Current Care Gaps' is visible, with 'INFLUENZA VACCINE (1)' highlighted. A pop-up window titled 'INFLUENZA VACCINE' is open, showing options to 'Add Completion', 'Postpone', or 'Discontinue'. The 'Add Completion' option is selected, and the 'Completion Date' is set to 12/8/2021. The 'Completion Reason' is set to 'Other - See Comments'. The 'Comments' field is empty. The window also shows 'Overdue - never done Addressed' and 'Accept' and 'Cancel' buttons.

Step 2 Record in Historical immunization

Log into the patient chart, go into immunizations, click on Historical Admin below, and choose the appropriate influenza vaccine that the patient previously had.



The screenshot shows the 'Immunizations - All Types' tab in a patient chart. A list of historical immunizations is displayed, including Hepatitis A, B, and C vaccines, Tetanus, Meningococcal, and Influenza vaccines. A pop-up window titled 'Record Select' is open, showing a search for 'influen' and a list of 50 records. The record '9000009 Influenza, Seasonal, Injectable - External' is selected. The window also shows 'Accept' and 'Cancel' buttons.