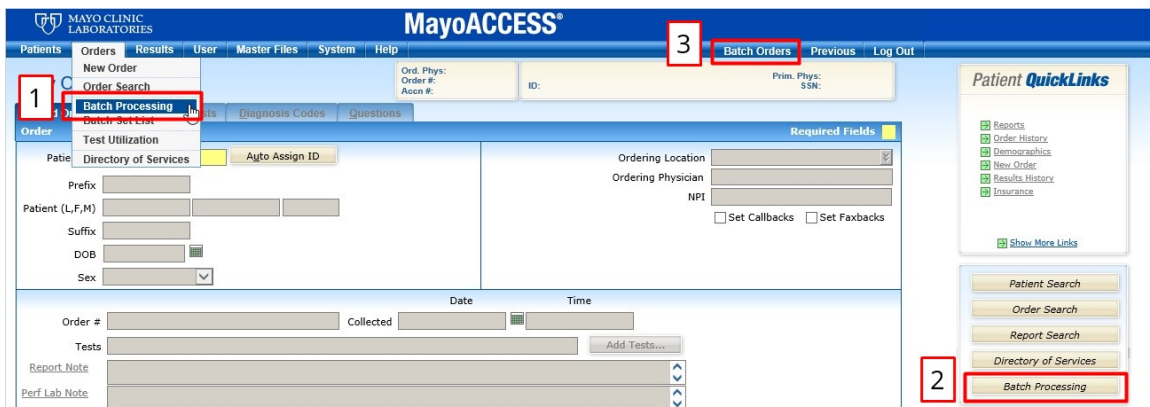


Closing a Batch in MayoAccess

Use the arrows below to navigate through the module.

©MFMR



The screenshot displays the MayoAccess interface. At the top, the navigation bar includes 'Patients', 'Orders', 'Results', 'User', 'Master Files', 'System', and 'Help'. The 'Orders' menu is highlighted with a red box and the number 1. Below it, the 'Batch Processing' option is also highlighted with a red box and the number 1. In the 'Patient QuickLinks' section on the right, the 'Batch Processing' link is highlighted with a red box and the number 2. At the top right of the main content area, the 'Batch Orders' link is highlighted with a red box and the number 3. The main content area contains various forms for patient information, ordering location, and test selection.

To access the Batch Processing screen, select one of three options:

- 1.) Mouse over the **Orders** menu and select Batch Processing.
- 2.) Select the Batch Processing link in the **Patient QuickLinks** menu.
- 3.) Select the **Batch Orders** link at the top of the screen (this is visible only when there is a batch to be closed).

Mouse over the blue hexagon icon (⦿) to display the Smart Menu.

NOTE: The Smart Menu allows you to customize the toolbar below the Batch Processing screen.

Place a check in the **Refresh Grid**, **Cancel Tests**, and **Edit Order** circles.

This places those functions in the toolbar below the Batch Processing screen. You are now able to refresh the screen when waiting for all tests to cross from your interface. Continue to click on **Refresh Grid** until all of the orders have crossed.

The screenshot shows the MayoACCESS Batch Processing interface. At the top, there are navigation tabs: Patients, Orders, Results, User, Master Files, System, Help, Batch Orders, Previous, and Log Out. The main heading is "Batch Processing". Below it, there are filter criteria for Location (C7028848-RSRs RM Sale), Source, and Batching Status. A table lists three orders with their respective batching statuses: Unbatchable (Red), Incomplete (Yellow), and Ready (Green). The Ready status is highlighted with a red box. To the right, there are Patient QuickLinks and search buttons.

Order #	Location	Collected	ID	Name	Batching Status	Source	Accession #	Batch
1223344	C7028848-R		987654	TEST,LISA	Unbatchable	Manual	M162194618	<input type="checkbox"/>
76432	C7028848-R	04/07/20 12:00	36352	Smith,Joseph	Incomplete	Manual	M158878238	<input type="checkbox"/>
H12345	C7028848-R	04/09/20 07:00	12451	Test,Linda	Ready	Manual	M158906267	<input type="checkbox"/>

Batching Status allows you to quickly identify whether or not an order to is ready to batch. There are three Batching Statuses: **Ready (Green)**, **Incomplete (Yellow)**, and **Unbatchable (Red)**.

This screenshot is similar to the first one, but it highlights the 'Ready' status in the table. The 'Ready' status is highlighted with a green box. Additionally, the 'Batch' column for the 'Ready' order now has a checked checkbox. The 'Billing Type' dropdown is set to 'Account', and a 'Close Batch Set' button is visible.

Order #	Location	Collected	ID	Name	Batching Status	Source	Accession #	Batch
1223344	C7028848-R		987654	TEST,LISA	Unbatchable	Manual	M162194618	<input type="checkbox"/>
76432	C7028848-R	04/07/20 12:00	36352	Smith,Joseph	Incomplete	Manual	M158878238	<input checked="" type="checkbox"/>
H12345	C7028848-R	04/09/20 07:00	12451	Test,Linda	Ready	Manual	M158906267	<input checked="" type="checkbox"/>

(Green) means that the order is **Ready** to be batched and sent to the laboratory.

The screenshot shows the MayoACCESS Batch Processing interface. The 'Batching Status' column for order 76432 is highlighted in yellow, indicating it is 'Incomplete'. The toolbar below the table has a red box around the 'Unanswered Questions' icon.

Order #	Location	Collected	ID	Name	Batching Status	Source	Accession #	Batch
1223344	C7028848-R		987654	TEST,LISA	Unbatchable	Manual	M162194618	<input type="checkbox"/>
76432	C7028848-R/04/07/20 12:00		36352	Smith,Joseph	Incomplete	Manual	M158878238	<input type="checkbox"/>
H12345	C7028848-R/04/09/20 07:00		12451	Test,Linda	Ready	Manual	M158906267	<input type="checkbox"/>

(Yellow) means that the order is **Incomplete**. The order is missing relevant information such as: answers to questions or required forms. Highlight that line, click on **Unanswered Questions** (in the toolbar below the Batch Processing screen) and provide the answers in the spaces provided. The batching status will change to (Green).

The screenshot shows the MayoACCESS Batch Processing interface. The 'Batching Status' column for order 1223344 is highlighted in red, indicating it is 'Unbatchable'. The toolbar below the table has a red box around the 'Edit Order' icon.

Order #	Location	Collected	ID	Name	Batching Status	Source	Accession #	Batch
1223344	C7028848-R		987654	TEST,LISA	Unbatchable	Manual	M162194618	<input type="checkbox"/>
76432	C7028848-R/04/07/20 12:00		36352	Smith,Joseph	Incomplete	Manual	M158878238	<input type="checkbox"/>
H12345	C7028848-R/04/09/20 07:00		12451	Test,Linda	Ready	Manual	M158906267	<input type="checkbox"/>

(Red) means that the order is **Unbatchable**. The order is missing relevant information such as: an unknown or obsolete test code received from the interface, missing collection date, date of birth, and/or physician name. Determine the cause, highlight the line and click on **Edit Order** to add missing information or to delete the incorrect test code and add the correct one.

MayoACCESS®

Patients Orders Results User Master Files System Help Batch Orders Previous Log Out

Batch Processing

Order Filter Criteria

Location: C7028848-RSRs RM Sale Source: [dropdown] sort by: Order # Location Name

Batching Status: [dropdown] Search Clear

Order #	Location	Collected	ID	Name	Batching Status	Source	Accession #	Batch
1223344	C7028848-R:		987654	TEST,LISA	Unbatchable	Manual	M162194618	<input type="checkbox"/>
76432	C7028848-R:04/07/20 12:00		36352	Smith,Joseph	Incomplete	Manual	M158878238	<input type="checkbox"/>
H12345	C7028848-R:04/09/20 07:00		12451	Test,Linda	Ready	Manual	M158906267	<input type="checkbox"/>

Refresh Grid Order Edit Order Unanswered Questions Cancel Tests

Order Issue Management

2 Select All Deselect All

Patient QuickLinks

- Reports
- Order History
- Demographics
- New Order
- Results History
- Insurance

Show More Links

Patient Search

Order Search

Report Search

There are two ways to select order(s) to include in a batch.

- 1.) Place a check mark in a box in the **batch** column, or
- 2.) Click on the **Select All** link.

NOTE: Unbatchables cannot be batched. The cause must be determined and corrected.

MayoACCESS®

Patients Orders Results User Master Files System Help Batch Orders Previous Log Out

Batch Processing

Order Filter Criteria

Location: C7028848-RSRs RM Sale Source: [dropdown] sort by: Order # Location Name

Batching Status: [dropdown] Search Clear

Order #	Location	Collected	ID	Name	Batching Status	Source	Accession #	Batch
1223344	C7028848-R:		987654	TEST,LISA	Unbatchable	Manual	M162194618	<input type="checkbox"/>
76432	C7028848-R:04/07/20 12:00		36352	Smith,Joseph	Incomplete	Manual	M158878238	<input checked="" type="checkbox"/>
H12345	C7028848-R:04/09/20 07:00		12451	Test,Linda	Ready	Manual	M158906267	<input checked="" type="checkbox"/>

Refresh Grid Order Edit Order Unanswered Questions Cancel Tests

Order Issue Management

Select All Deselect All

Unresolved Issues

Billing Type: Account

Close Batch Set

Patient QuickLinks

- Reports
- Order History
- Demographics
- New Order
- Results History
- Insurance

Show More Links

Patient Search

Order Search

Report Search

Directory of Services

Place a check in the boxes for the tests to be batched, then click on **Close Batch Set**.

Batch sheets will print automatically.

Closing a Batch in MayoAccess

Complete

[Retake Module](#)