

Managing Test Orders

This section contains information about the following tasks:

- Searching for an order
- Adding a test to an order
- Changing an order
- Cancelling a test
- Cancelling an order

You can use SmartLinks on the Order Search page to perform the following additional tasks:

Task	SmartLink
View or print information about the selected order	Order
Fax test results for multiple orders to a specified fax number	Fax Multiple Reports
Fax the test results for the selected order to a specified fax number	Fax Report
View or print the orders that are shown on the Order Search page	Search Results
View or print the orders with pending tests	Pending Tests
Open the Batch Set List page so that you can view batch information for the selected order	Batch Information
View the report for the selected order	Report
View or print a report that shows information about the cancelled tests in the selected order	Cancelled Tests
Generate the post-batch processing report for the selected order	Post Batch Processing Report
Specify callback settings for the selected order	Set Callback
Specify faxback settings for the selected order	Set Faxback
View or print specimen labels for the selected order	Specimen Labels

Tip: SmartLinks that are not shown on the Order Search page are available on the SmartMenu.

Searching for an Order

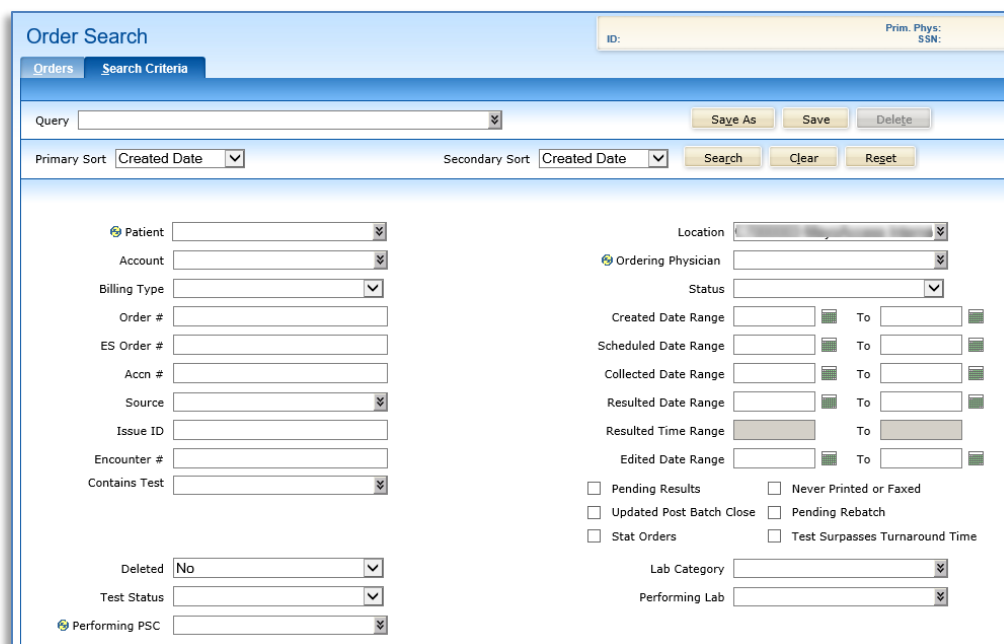
To locate an order, follow these steps:

1. On the **Orders** menu, click **Order Search**.

Tip: Alternatively, you can click **Order Search** in the extended frameset.



2. On the Order Search page, click the **Search Criteria** tab.



3. On the Search Criteria page, specify any of the following criteria to locate the order:

Tip: You can select a previously saved search from the **Query** drop-down list.

Search Criteria	Description
Patient	The patient's last name Tip: Enter as many characters as you can. The search results contain all the patient records that match the letters that you specify. For example, if you enter DO, all patients with last names that contain DO are shown.

Search Criteria	Description
Account	The account that was used to place the order
Billing Type	The billing type that was specified when the order was placed
Order #	The accession number for your Laboratory Information System (LIS) You must specify the complete number.
ES Order #	The number that the electronic system (ES) assigned to the order
Accn #	The accession number that the MayoACCESS application assigned to the order You must specify the complete number.
Source	Whether the order is integrated or manual An integrated order originated from a Laboratory Information System (LIS). A manual order originated from within the MayoACCESS application.
Issue ID	The ID number assigned to an issue that is associated with the order
Contains Test	A test that the order contains
Deleted	Whether the order has been deleted
Test Status	The status of the test
Performing PSC	Not used
Location	The location from which the order was placed
Ordering Physician	The physician who ordered the test
Status	The status of the order
Created Date Range	The range of dates during which the order was created Tip: Use the calendar icons to specify the dates.

Search Criteria	Description
Scheduled Date Range	The range of dates during which the tests were scheduled to be performed Tip: Use the calendar icons to specify the dates.
Collected Date Range	The range of dates during which the specimens for the order were collected Tip: Use the calendar icons to specify the dates.
Resulted Date Range	The range of dates during which the test results became available Tip: Use the calendar icons to specify the dates.
Resulted Time Range	If the Resulted Date Range value is a single day, the time range during which the test results became available
Edited Date Range	The range of dates during which the order was changed Tip: Use the calendar icons to specify the dates.
Pending Results Updated Post Batch Close Stat Orders Never Printed or Faxed Pending Rebatch Test Surpasses Turnaround Time	The status of the order
Lab Category	The category of the laboratory that is performing the test
Performing Lab	The laboratory that is performing the testing
Order Includes Issues of Status	The status of issues that are associated with the order
Order Includes Issues of Type	The type of issue that is associated with the order

Tip: To save your search criteria selections for future use, click **Save**.

4. Click **Search**.

The orders that match the specified search criteria are shown.

Adding a Test to an Order

The steps for adding a test to an order depend on whether the order is in a batch that was previously closed, hereafter referred to as *closed batch*.

To add a test to an order that is not in a closed batch, follow the instructions in [Changing an Order before Closing the Batch](#) on page 55.

To add a test to an order that is in a closed batch, use one of the following methods:

- Add a test to a manual order
- Add a test to an integrated order
- Add a test by submitting an Add Tests to an Order form

You cannot use these methods to add a test to an order that has a status of Specimen Received, Partially Completed, or Final. If you want to add a test to an order that has any of these statuses, contact Mayo Clinic Laboratories.

Adding a Test to a Manual Order

To add a test to a manual order, follow these steps:

1. On the **Orders** menu, click **Order Search**.

Tip: Alternatively, you can click **Order Search** in the extended frameset.



2. On the Order Search page, select the order to which you want to add a test.

Tip: Click the **Search Criteria** tab and use that page to locate the order. For instructions, see [Searching for an Order](#) on page 47.

3. Click the **Edit Order** link.

The screenshot shows the 'Order Search' results page. At the top, there is a header for the selected order: 'TEST, BRIAN' with details: ID: C7000003-0..., Male, 04/04/1924, 96Y, Prim. Phys: SSN: [redacted]. Below this is a table with two tabs: 'Orders' and 'Search Criteria'. The table has columns: Collected, Order, Order Status, Name, ID, Acct, Phys, Type, ABN Printed/Signed, P/S, Callback, CB, Faxback, FB, Stat Orders, and SO. The table contains two rows of data.

Collected	Order	Order Status	Name	ID	Acct	Phys	Type	ABN Printed/Signed	P/S	Callback	CB	Faxback	FB	Stat Orders	SO
03/29/21 10:	8675309-3	Not Sent To Lab	TEST, BRIAN	C7000003-00005	C7000003	Test Physician	Account								
12/26/12 03:	M107354538	Cancelled	TEST, PATIENT	C7000003-00008	C7000003	TESTS	Account								

4. On the Order Details page, click **Continue**.

Order Details

Ord. Phys: Test Physi...
Order #: 8675309-3
Accn #: M167283215

TEST, BRIAN
ID: C7000003-0... Male 04/04/1924 96Y Prim. Phys: SSN:

Order Information Edit Patient Details

Order # 8675309-3
Accession # M167283215
Ordering Physician Test Physician
Billing Type Account

Collected Date 03/29/2021 Time 10:30
User
Ordering Location

Specimen Collector
Encounter
 Set Callbacks Set Faxbacks

Report Note
Perf Lab Note

Cancel Continue

- On the Tests page, in the **Tests** text box, enter the test name, test code, or test mnemonic for the test that you want to add to the order.

Order Details

Ord. Phys: Test Physi...
Order #: 8675309-3
Accn #: M167283215

TEST, BRIAN
ID: C7000003-0... Male 04/04/1924 96Y Prim. Phys: SSN:

Order Tests

Keyword Include Obsolete Tests

Short List Site Physician Specialty

AAT Alpha-1-Antitrypsin, S CATU Catecholamine Fract,... HPV HPV with Genotyping,... HODGE [OBSOLETE]... 5468 [OBSOLETE]...
 FRBC [OBSOLETE] Folate,... 5434 [OBSOLETE]... SDEL [OBSOLETE]... P53KM [OBSOLETE] TP53... TCGRV T Cell Receptor...

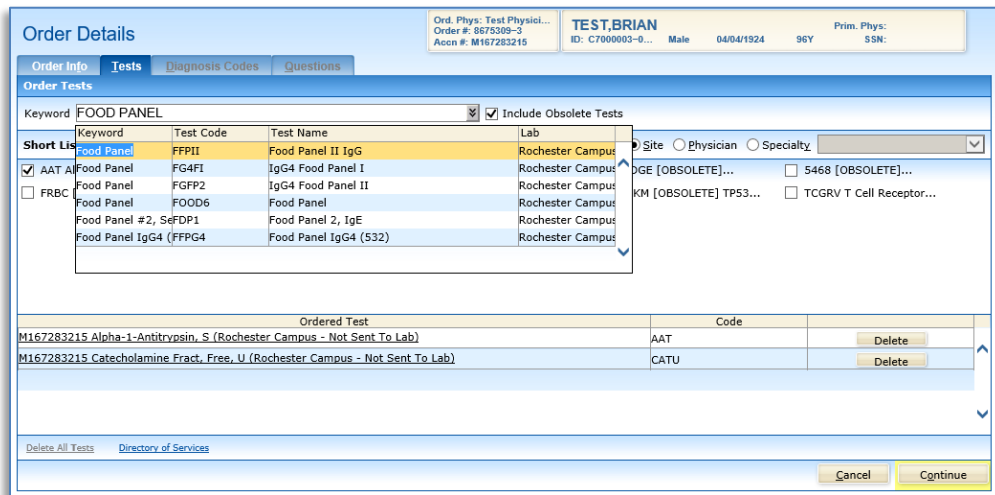
Ordered Test	Code	
M167283215 Alpha-1-Antitrypsin, S (Rochester Campus - Not Sent To Lab)	AAT	Delete
M167283215 Catecholamine Fract, Free, U (Rochester Campus - Not Sent To Lab)	CATU	Delete

Delete All Tests [Directory of Services](#)

Cancel Continue

- Click the arrow next to the **Tests** text box.

The tests that match the keyword that you entered are shown.

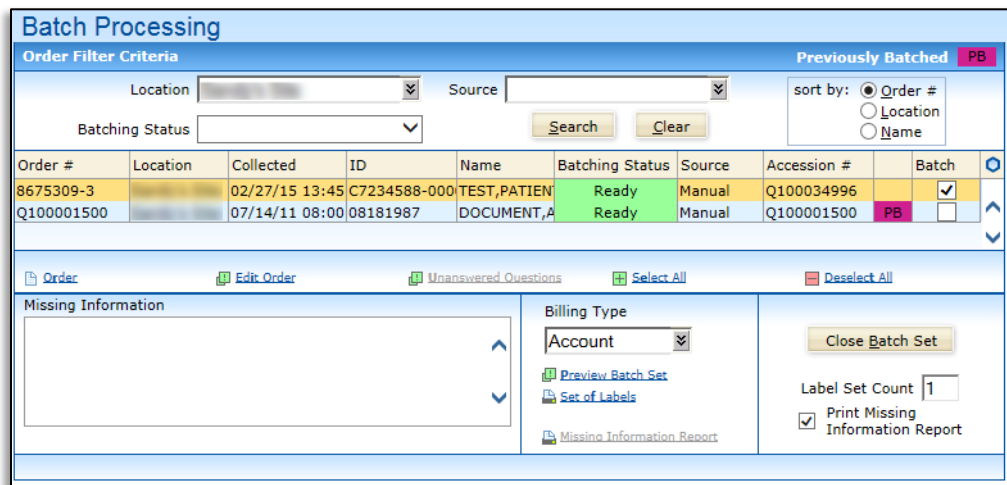


7. Select the test that you want to add from the list.
The test that you selected is shown at the bottom of the Ordered Test list.
8. Repeat steps 5 - 7 to add more tests to the order. When you are finished, click **Continue**.
If you need to answer any questions for an additional test, the **Test Questions** page is shown.
9. If required, answer any questions for the additional test.
After you add a test to the order, you must batch the order again.
10. On the **Orders** menu, click **Batch Processing**.
Tip: Alternatively, you can click **Batch Processing** in the extended frameset.



The Batch Processing page is shown.

Note: On the Batch Processing page, a **PB** next to the order indicates that an order was previously batched.



11. Click the check box in the Batch column for the order.

12. Click **Close Batch Set**.

The new test is added to the existing order.

Adding a Test to an Integrated Order

An integrated order is an electronic order received from your Laboratory Information System (LIS), which the MayoACCESS application refers to as an electronic system (ES).

To add a test to an integrated order, follow these steps:

1. From your LIS, add the test to the order, and then transmit the order.

Next, you must batch the updated order.

2. On the **Orders** menu, click **Batch Processing**.

Tip: Alternatively, you can click **Batch Orders** on the menu bar or click **Batch Processing** in the extended frameset.



The Batch Processing page is shown.

Note: On the Batch Processing page, a **PB** next to the order indicates that a test was added to that order.

3. Click the check box in the Batch column for the order.
4. Click **Close Batch Set**.

The new test is added to the existing order.

Adding a Test by Submitting an Add Tests to an Order Form

To add a test by submitting an Add Tests to an Order form, follow these steps:

1. On the **Help** menu, click **Add Tests to an Order**.

Tip: Alternatively, you can click the **Add Tests to an Order** link in the extended frameset.

2. On the Add Tests to an Order form, specify the following information. Required information is marked with a red asterisk (*) on the form.

Field	Description
Account Number	Your account number. For example: C7xxxxxx
Account Name	Name of your facility
Name of Person Adding Tests	Name of the person requesting the test
Preferred Confirmation Method	Whether you would like test confirmation by phone or email

Field	Description
Phone Number	Phone number for the person requesting the test
Email Address	Email address for the person requesting the test
Patient Name	Name of the patient
Patient ID Number	Medical record number for the patient
Order Number (optional)	The accession number for your Laboratory Information System (LIS)
Accession Number (optional)	Accession number for the order
Is a separate specimen being sent for this request?	Yes or No
Mayo Test ID	Mayo Clinic Laboratories test code
Test Name	Name of test
Additional notes	Additional information for processing

3. Click **Submit**.

Changing an Order before Closing the Batch

To change an order, follow these steps:

1. On the **Orders** menu, click **Batch Processing**.

Tip: Alternatively, you can click **Batch Orders** on the menu bar or **Batch Processing** in the extended frameset.



2. On the Batch Processing page, select your location from the **Location** drop-down list.
3. Select the order that you want to change.
4. Click the **Edit Order** link.

Batch Processing

Order Filter Criteria Previously Batched **PB**

Location: [Dropdown] Source: [Dropdown] sort by: Order # Location Name

Batching Status: [Dropdown] Search Clear

Order #	Location	Collected	ID	Name	Batching Status	Source	Accession #	Batch
8675309-3	Sandy's Site	02/27/15 13:45	C7234588-000	TEST,PATIENT	Ready	Manual	Q100034996	
Q100001500	Sandy's Site	07/14/11 08:00	08181987	DOCUMENT,A	Ready	Manual	Q100001500	PB
Q100001741	Sandy's Site	07/19/11 08:00	0422	PREFIX LNAM	Ready	Manual	Q100001741	

Order Edit Order Unanswered Questions Select All Deselect All

The Order Details page is shown.

Order Details

Ord. Phys: Test Physi... TEST, BRIAN
 Order #: 8675309-3 ID: C7000003-0... Male 04/04/1924 96Y Prim. Phys: SSN:
 Accon #: M167283215

Order Info Tests Diagnosis Codes Questions

Order Information Required to Save Required to Order

Order # 8675309-3
 Accession # M167283215
 Ordering Physician Test Physician
 Billing Type Account

Date 03/29/2021 Time 10:30
 Collected User
 Ordering Location

Specimen Collector
 Encounter
 Set Callbacks Set Faxbacks
 Report Note
 Perf Lab Note

Cancel Continue

Tip: You can use the **Edit Patient Details** link to change patient information. For instructions, see [Changing Patient Information](#) on page 31.

- Click the tab for the page that contains the information that you want to change.
 For information about the fields that you can change, see [Ordering a Test by Using Standard Order Entry](#) on page 38.
- When you are finished changing the order, click **Continue**.
 A message is shown confirming that the order is saved.
- Click **OK**.
- If you selected the **Set Callbacks** check box, the Callback Settings dialog box is shown. Specify the callback settings for this test. For instructions, see [Specifying Callbacks](#) on page 42.
- If you selected the **Set Faxbacks** check box, the Faxback Settings dialog box is shown. Specify the faxback settings for this order. For instructions, see [Specifying Faxbacks](#) on page 44.

Canceling a Test

To cancel a test, follow these steps:

1. On the **Orders** menu, click **Order Search**.

Tip: Alternatively, you can click **Order Search** in the extended frameset.



2. On the Order Search page, click the **Search Criteria** tab.
3. On the Search Criteria page, select the patient name from the **Patient** drop-down list.

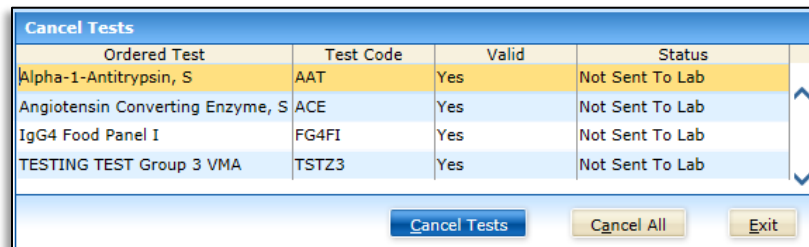
4. Click **Search**.

The orders that match the specified patient name are shown on the Orders page.

5. Select the order that contains the test that you want to cancel.
6. Click the **Cancel Tests** link.

Tip: If the **Cancel Tests** link is not shown on the Orders page, it is available on the SmartMenu.

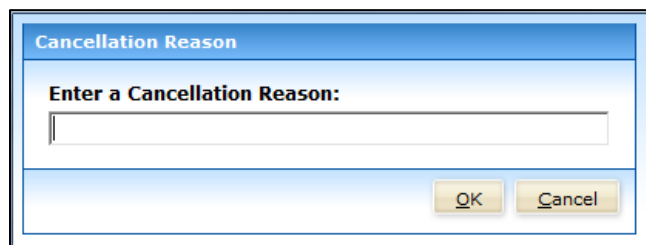
- In the Cancel Tests dialog box, select the test that you want to cancel.



- Click **Cancel Tests**.

Note: To cancel all tests in this order, click **Cancel All**.

- In the Cancellation Reason dialog box, enter the reason for cancelling the test.



- Click **OK**.

A message confirming the test cancellation is shown.

- Click **OK**.

- To cancel additional tests, repeat steps 7 - 11.

- Click **Exit**.

Cancelling an Order

To cancel an order, follow these steps:

- On the **Orders** menu, click **Batch Processing**.

Tip: Alternatively, you can click **Batch Orders** on the menu bar or **Batch Processing** in the extended frameset.



- On the Batch Processing page, in the Batch column, click the check box next to the order that you want to delete.

3. Click the **Cancel Tests** link.

Tip: If the Cancel Tests link is not shown on the Orders page, it is available on the SmartMenu.

4. In the Cancel Tests dialog box, click **Cancel All**.
5. In the Cancellation Reason dialog box, enter the reason for cancelling the tests.

6. Click **OK**.
A message confirming the cancellation is shown.
7. Click **OK**.