

Batching Test Orders

When you order a test in the MayoACCESS application, the order is not submitted immediately. This enables you to submit orders in batches that have something in common. For example, you might batch orders for any of the following reasons:

- The orders were created in a specific time period, such as a business day
- The orders contain the same or similar tests
- The orders contain the same or similar specimens
- The specimens in the order require the same storage or shipping temperature
- The specimens in the order are transported at the same time

Submitting a batch of orders is called closing the batch. You can close a batch of test orders at any time.

Each order in the batch has a shipping and storage temperature associated with each test specimen in the order. These temperatures are defined in the test catalog. The following temperatures are used:

- Ambient (room temperature)
- Frozen
- Refrigerated
- Miscellaneous

Note: Miscellaneous is used when multiple specimens include different sources that impact the preferred specimen temperature or when specimens are being sent to an outside reference laboratory that requires different specimen temperatures from Mayo Clinic Laboratories. Contact Mayo Clinic Laboratories to learn how to send specimens with miscellaneous temperatures.

When you close a batch, the orders are submitted to the performing laboratories and the batch is assigned one or more numbers, depending on the performing laboratory or specimen shipping temperature. Each numbered batch is associated with a batch sheet. The batch sheet lists the specimens in that batch and can be used as a packing list.

When you close a batch of orders, the orders in the batch are grouped by temperature.

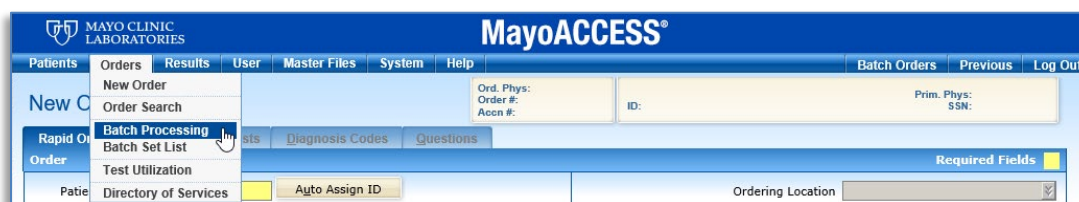
This section contains information about closing a batch and printing a batch sheet.

Closing a Batch

Submitting a batch of orders is called closing the batch. You can close a batch of test orders at any time. To close a batch of orders, follow these steps:

1. 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.



2. On the Batch Processing page, from the **Location** drop-down list, select the location for which you would like to close a batch.

The orders that are not part of a batch are shown. The Batching Status column indicates whether each order is ready as follows:

Batching Status	Description
Ready	The order is ready to be batched.
Incomplete	The order is missing information, such as answers to questions or required information.
Unbatchable	The order cannot be batched because of missing information, such as collection date, patient date of birth, or physician name, or because of an unknown test code.

3. To prepare an incomplete order for batching, follow these steps:
 - a. Select the order.

Batch Processing

Order Filter Criteria: Location [Sandy's Site], Source [Manual], Batching Status [Incomplete], Search, Clear

Previously Batched: PB, sort by: Order #, Location, Name

Order #	Location	Collected	ID	Name	Batching Status	Source	Accession #	Batch
8675309-4		03/02/15 09:21	C7234588-000	TEST,PATIEN	Incomplete	Manual	Q100035009	
Q100001500		07/14/11 08:00	08181987	DOCUMENT,A	Ready	Manual	Q100001500	PB
Q100001741		07/19/11 08:00	0422	PREFIX LNAM	Ready	Manual	Q100001741	

Order, Edit Order, Unanswered Questions, Select All, Deselect All

Missing Information: Questions Missing Answers: 1. Collection Duration, 2. Urine Volume

Billing Type: Account, Preview Batch Set, Set of Labels, Missing Information Report

Label Set Count: 1, Print Missing Information Report

Close Batch Set

- b. Click the Unanswered Questions link.
- c. Provide the missing information.

Edit Order Questions Required Fields

Catecholamine Fract, Free, U / CATU

Collection Duration [] Urine Volume []

Cancel Save

- d. Click **Save**.

The batching status for the order changes to Ready.

Batch Processing

Order Filter Criteria: Location [Sandy's Site], Source [Manual], Batching Status [Ready], Search, Clear

Previously Batched: PB, sort by: Order #, Location, Name

Order #	Location	Collected	ID	Name	Batching Status	Source	Accession #	Batch
8675309-4		03/02/15 09:21	C7234588-000	TEST,PATIEN	Ready	Manual	Q100035009	
Q100001500		07/14/11 08:00	08181987	DOCUMENT,A	Ready	Manual	Q100001500	PB
Q100001741		07/19/11 08:00	0422	PREFIX LNAM	Ready	Manual	Q100001741	

4. To prepare an unbatchable order for batching, follow these steps:

Note: If this is an integrated order, cancelling and recreating the order enables you to receive test results without errors. For instructions, see [Cancelling an Order](#) on page 58 and [Ordering a Test](#) on page 35.

- a. Select the order.

- b. Determine the cause.
- c. Click the **Edit Order** link.
- d. Add the missing information or delete the incorrect test code and add the correct one.
- e. Save your changes.

The batching status for the order changes to Ready.

- 5. Select the orders that you want to include in a batch by clicking the check box next to each order.

Tip: You can click the **Select All** link to select all the orders. If the **Select All** link is not shown on the Batch Processing page, it is available on the SmartMenu.

Batch Processing

Order Filter Criteria: Location [Sandy's Site], Source [Manual], Batching Status [Ready], Search, Clear

Previously Batched: PB, sort by: Order #, Location, Name

Order #	Location	Collected	ID	Name	Batching Status	Source	Accession #	Batch
8675309-3		02/27/15 13:45	C7234588-000	TEST,PATIENT	Ready	Manual	Q100034996	<input type="checkbox"/>
Q100001689		07/18/11 08:00	0422	PREFIX LNAM	Ready	Manual	Q100001689	<input type="checkbox"/>
Q100001741		07/19/11 08:00	0422	PREFIX LNAM	Ready	Manual	Q100001741	<input type="checkbox"/>

Order Edit Order Unanswered Questions Select All Deselect All

- 6. **Optional:** After you select the orders that you want to batch, preview the batch by clicking the **Preview Batch Set** link.

Batch Processing

Order Filter Criteria: Location [Sandy's Site], Source [Manual], Batching Status [Ready], Search, Clear

Previously Batched: PB, sort by: Order #, Location, Name

Order #	Location	Collected	ID	Name	Batching Status	Source	Accession #	Batch
Q100001506		03/02/15 11:21	08181987		Ready	Manual	P1971660	<input checked="" type="checkbox"/>
Q7000114		03/02/15 11:23	JR10000007		Ready	Manual	Q100035021	<input checked="" type="checkbox"/>
Q86753091		03/02/15 11:19	C7234588-000		Ready	Manual	Q100035013	<input checked="" type="checkbox"/>

Order Edit Order Unanswered Questions Select All Deselect All

Missing Information: [Empty field]

Billing Type: Account

Preview Batch Set (highlighted with green arrow), Set of Labels, Missing Information Report

Close Batch Set, Label Set Count: 1, Print Missing Information Report

The Batch Set Preview window is shown.

Batches			
Campus	Temperature	Location	Infectious
Rochester Campus	Refrigerated	Sandy's Site	N
Rochester Campus - Co-Path	Ambient	Sandy's Site	N

Tests in Selected Batch								
Order #	Location	Collected	Test Code	Test Name	ID	Name	Source	Accession #
Q7000114		03/02/15 11:23	CDGF	Celiac Disease	JR10000007		Manual	Q100035021
Q86753091		03/02/15 11:19	AAT	Alpha-1-Antitr	C7234588-0000		Manual	Q100035013
Q86753091		03/02/15 11:19	ACE	Angiotensin Co	C7234588-0000		Manual	Q100035013
Q86753091		03/02/15 11:19	CATU	Catecholamine	C7234588-0000		Manual	Q100035013
Q86753091		03/02/15 11:19	FIBUP	Ibuprofen (Mo	C7234588-0000		Manual	Q100035013

From this window, you can view or print all the batch sheets, a specific batch sheet, or the specimen labels for this batch.

- To close this batch, click **Close Batch Set**.

The batch sheets for this batch set are printed automatically.

Note: Closing a batch might also generate a Missing Information Report worksheet. Send the completed worksheet to Mayo Clinic Laboratories so that the information can be added before the specimens arrive.

Printing a Batch Sheet

Batch sheets are automatically printed when you close a batch. To reprint batch sheets, follow these steps:

- On the **Orders** menu, click **Batch Set List**.

- On the Batch Set List page, click the calendar icon next to the **Batch Set Date Range** and specify start and end dates.

Batch Set List

Batch Sets

Batch Set Date Range To

Date	Time	User
03/02/15	09:40	[blurred]
07/19/11	10:00	[blurred]
07/15/11	10:28	[blurred]
07/15/11	09:45	[blurred]

Batches for Selected Batch Set

Batch #	Date/Time	Campus	Temperature	Location	Infectious	Override
52244	03/02/2015 09:40	Rochester Campus	Refrigerated	[blurred]	N	No
52245	03/02/2015 09:40	Rochester Campus	Frozen	[blurred]	N	No

[Set of Batch Sheets](#)
 [Selected Batch Sheet](#)
 [Set of Labels](#)
 [Missing Information Re...](#)

Tests for Selected Batch

Order #	Location	Collected	Test Code	Test Name	ID	Name	Source	Accession #
8675309-3	[blurred]	02/27/15 13:45	AAT	Alpha-1-Antitr	C7234588-0000	[blurred]	T Manual	Q100034996
8675309-3	[blurred]	02/27/15 13:45	ACE	Angiotensin Cc	C7234588-0000	[blurred]	T Manual	Q100034996
8675309-3	[blurred]	02/27/15 13:45	FG4FI	IgG4 Food Pan	C7234588-0000	[blurred]	T Manual	Q100034996
8675309-3	[blurred]	02/27/15 13:45	CATU	Catecholamine	C7234588-0000	[blurred]	T Manual	Q100034996

- Click **Search**.
- The batch sets for that date range are displayed.
- Select the batch set that contains the batch sheet that you want to print.
- Click the **Selected Batch Sheet** link.

Tips:

- If the **Selected Batch Sheet** link is not shown on the Batch Set List page, it is available on the SmartMenu.
- To print all the batch sheets in the selected batch set, click the **Set of Batch Sheets** link.
- To print the specimen labels for this batch, click the **Set of Labels** link.
- To print a batch sheet or set of batch sheets when you are viewing them, click **Print Report**.

Printing the Batch Sheet for a Specific Order

Batch sheets are automatically printed when you close a batch. To reprint the batch sheet for a specific 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 search criteria:
 - Patient name
 - Order number
 - Accession number

 A screenshot of the 'Order Search' page, specifically the 'Search Criteria' tab. The page has a header with 'Order Search' and a 'Prim. Phys: SSN:' field. Below the header, there are 'Query', 'Save As', 'Save', and 'Delete' buttons. The 'Primary Sort' is set to 'Created Date' and the 'Secondary Sort' is also 'Created Date'. There are 'Search', 'Clear', and 'Reset' buttons. The main area contains various search criteria:

- Patient (dropdown)
- Account (dropdown)
- Billing Type (dropdown)
- Order # (text input)
- ES Order # (text input)
- Accn # (text input)
- Source (dropdown)
- Issue ID (text input)
- Encounter # (text input)
- Contains Test (dropdown)
- Deleted (dropdown, set to 'No')
- Test Status (dropdown)
- Performing PSC (dropdown)
- Location (dropdown)
- Ordering Physician (dropdown)
- Status (dropdown)
- Created Date Range (date range)
- Scheduled Date Range (date range)
- Collected Date Range (date range)
- Resulted Date Range (date range)
- Resulted Time Range (time range)
- Edited Date Range (date range)
- Checkboxes: Pending Results, Never Printed or Faxed, Updated Post Batch Close, Pending Rebatch, Stat Orders, Test Surpasses Turnaround Time
- Lab Category (dropdown)
- Performing Lab (dropdown)

4. Click **Search**.

The orders that match the specified search criteria are shown on the Orders page.

5. Select the order for which you want to print the batch sheet.
6. Click the Batch Information link.

Tip: If the **Batch Information** link is not shown on the Order Search page, it is available on the SmartMenu.

The batch set for that order is shown.

Batch Set that Includes Order # 8675309-3								
Date	Time	User						
03/02/15	09:40							
Batches for Selected Batch Set								
Batch #	Date/Time	Campus	Temperature	Location	Infectious	Override		
52244	03/02/2015 09:40	Rochester Campus	Refrigerated		N	No		
52245	03/02/2015 09:40	Rochester Campus	Frozen		N	No		
Set of Batch Sheets Selected Batch Sheet Set of Labels Missing Information Re...								
Tests for Selected Batch								
Order #	Location	Collected	Test Code	Test Name	ID	Name	Source	Accession #
8675309-3		02/27/15 13:40	AAT	Alpha-1-Anti	C7234588-000		Manual	Q100034996
8675309-3		02/27/15 13:40	ACE	Angiotensin	C7234588-000		Manual	Q100034996
8675309-3		02/27/15 13:40	FIBUP	Ibuprofen (M	C7234588-000		Manual	Q100034996
8675309-4		03/02/15 09:21	VH	VMA and HVA,	C7234588-0000		Manual	Q100035009
8675309-4		03/02/15 09:21	CATU	Catecholamine	C7234588-0000		Manual	Q100035009

Note: If more than one temperature is included in the accession number, all batches are displayed for the order.

- To print the batch sheet for the selected order, click the **Selected Batch Sheet** link.

Tips:

- If the **Selected Batch Sheet** link is not shown on the page, it is available on the SmartMenu.
- To print all of the batch sheets that were batched with the selected order, click the **Set of Batch Sheets** link.
- To print the specimen labels for this order, click the **Set of Labels** link.