MAYO CLINIC
LABORATORIES

MayoACCESS® User's Guide

Release 10

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Getting Started

MayoACCESS is a web-based application that connects medical and clinical facilities to laboratories. Using the connectivity of the web, MayoACCESS is an efficient ordering, tracking, and reporting system that can be used to perform the following tasks:

- Ordering laboratory tests
- Entering and tracking patient information
- Printing laboratory results for patients
- Printing batch sheets and specimen labels
- Providing important notifications to concerned entities

Contacting Customer Service

Use the following information to contact Customer Service:

United States and Canada

Telephone	800-533-1710 (toll free) 507-266-5700
Fax	507-284-1759
Email	mml@mayo.edu
Mail	Mayo Clinic Laboratories 3050 Superior Drive NW Rochester, MN 55901 UNITED STATES

International

Telephone	+1 855-379-3115 (toll free) +1 507-284-9273
Fax	+1 507-284-1759
Email	mmlglobal@mayo.edu
Mail	Mayo Clinic Laboratories 3050 Superior Drive NW Rochester, MN 55901 UNITED STATES

MayoACCESS Information

You can find MayoACCESS information on the MayoACCESS References web page (Mayocliniclabs.com/order-tests/mayoaccess-reference.html). This web page contains the following information:

- Release Notes that describe what's new for each release
- Overview, installation, and setup information
- Training modules that demonstrate how to perform specific tasks
- Quick references that show basic steps for specific tasks
- This guide, which contains all the information that you need to use the MayoACCESS application

You can also access this information from within the MayoACCESS application by clicking **Help** on the **Help** menu.

Logging in to MayoACCESS

To get started using the MayoACCESS application, you must log in. The following topics describe how to perform these tasks as well as how to log in if you have forgotten your password, and how to log out of the application.

To log in to the MayoACCESS application, follow these steps:

1. In a web browser, enter one of the following URLs to get to the MayoACCESS login window.
   - **Test Site:** https://test.mmlaccess.com
   - **Production Site:** https://mmlaccess.com

     Alternatively, click **MayoACCESS** on the Mayo Clinic Laboratories website:

   Tip: To add a shortcut for the MayoACCESS application to your computer desktop, see Adding a Desktop Shortcut to the MayoACCESS Application on page 139.

2. Enter your email address and password.

   Note: Passwords are case sensitive.

3. Click **Sign in**.

   If test results are available, the following message is displayed when you log in:

   `You have unread reports.`

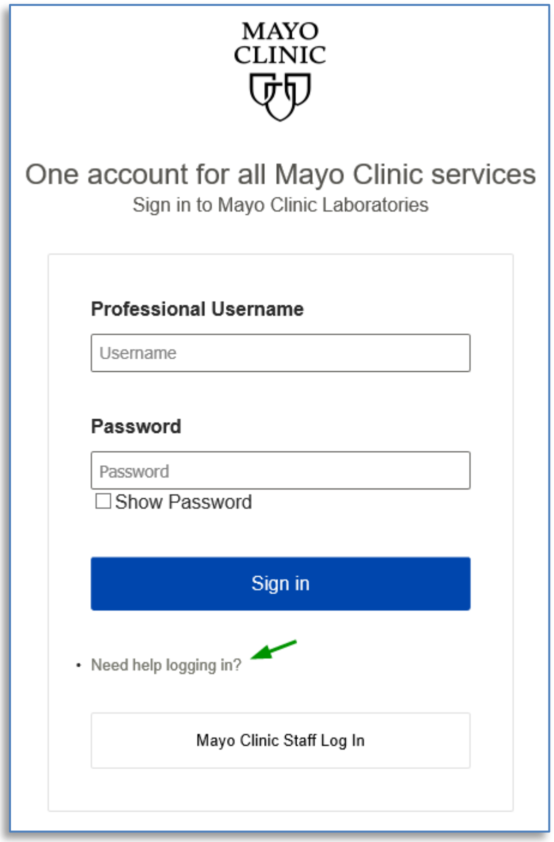
   You can choose to view and print the unread reports.

When you are finished, the New Order page is shown. This page is the starting point for ordering a test. For instructions, see Ordering a Test on page 35.

Logging in to MayoACCESS If You Forgot Your Password

If you forgot your password, follow these steps to log in to the MayoACCESS application:

1. In a web browser, enter one of the following URLs to get to the MayoACCESS login window.
   - **Test Site:** https://test.mmlaccess.com
   - **Production Site:** https://mmlaccess.com
2. On the Sign In page, click the **Need help logging in?** link.



You will be asked to enter your email address and answer the security question. Then, you will receive an email notification with instructions for changing your password.

Logging out of MayoACCESS

To log out of the MayoACCESS application, click **Log Out** on the menu bar.

Using MayoACCESS

The MayoACCESS application is made up of various components:

- Menus
- Shortcuts
- Patient Information Bar
- SmartLinks
- SmartMenus
- Extended Frameset

The MayoACCESS features and functions that you see are controlled by the security groups to which you belong, so your view of the MayoACCESS application might differ from that of other users.

The following topics describe each of these components.

MayoACCESS Menus

The MayoACCESS menus provide access to the main functions of the application.

To display the menu options, hover over the menu. To select an option, click the menu item. The following menus are available:

Patients

This menu contains options that are specific to a patient, such as ordering a test, viewing orders and test results, changing patient information, and creating cumulative reports. Some menu items are disabled until you select a patient record.

Orders

This menu contains options that are associated with ordering tests, such as accessing the directory of services, searching for an order, working with batches, and viewing test utilization.

Results

This menu contains options that are associated with viewing, printing, and forwarding reports that contain test results.

User

This menu contains options for opening the InfoLink Inbox, changing to a different site, and creating notification subscriptions.

Master Files

This menu contains options for creating comments, custom profiles, and short lists, and for working with physician and patient records. Access to this menu might be restricted to supervisors or system administrators.

System

This menu contains an option for setting up and maintaining MayoACCESS user information. Access to this menu is restricted to supervisors or system administrators.

Help

This menu contains options for accessing MayoACCESS information and the Add Tests to an Order form, checking the application version, viewing and changing ActiveX installation and browser settings, and analyzing your system.

MayoACCESS Shortcuts

The MayoACCESS menu bar contains shortcuts for actions you might frequently take.

The following shortcuts are available:

Batch Orders

This shortcut opens the Batch Processing page. For information about batch processing, see Batching Test Orders on page 61.

Previous

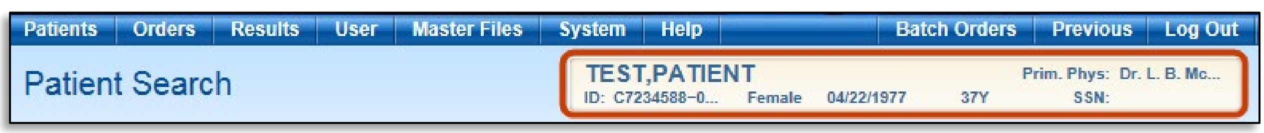
This shortcut switches from the page you are viewing to the previous page.

Log Out

This shortcut logs you out of the MayoACCESS application.

Patient Information Bar

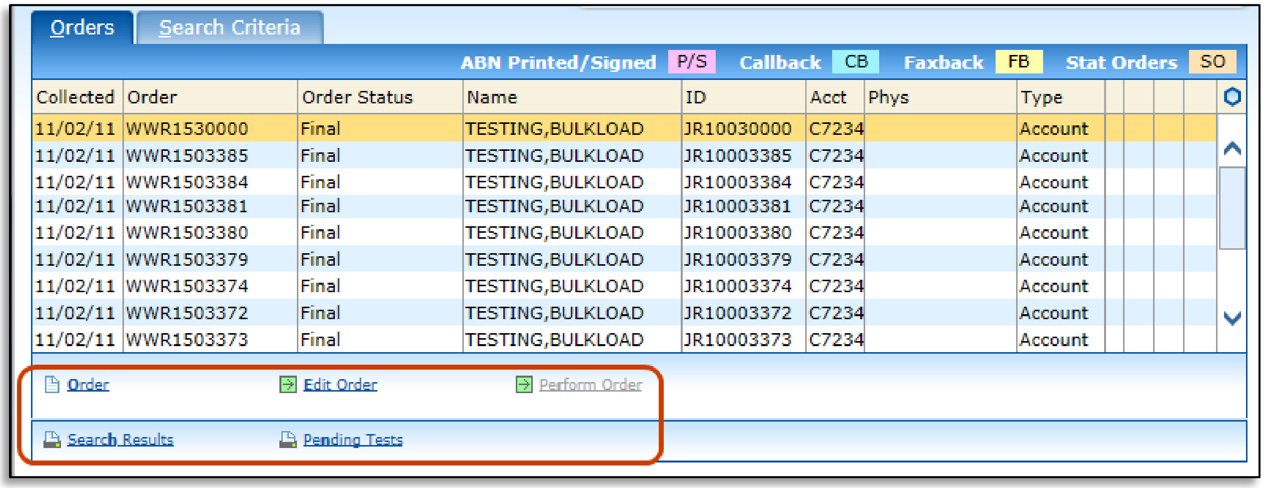
The patient information bar shows information about the selected patient.



You can click the patient information bar to open the Patient Demographics page.

SmartLinks

The SmartLinks, shown at the bottom of a section, provide links to functions related to that section of the page. You can click these links to perform tasks. For example, in the following figure, you can click the **Order** link to view and print details about the selected order.



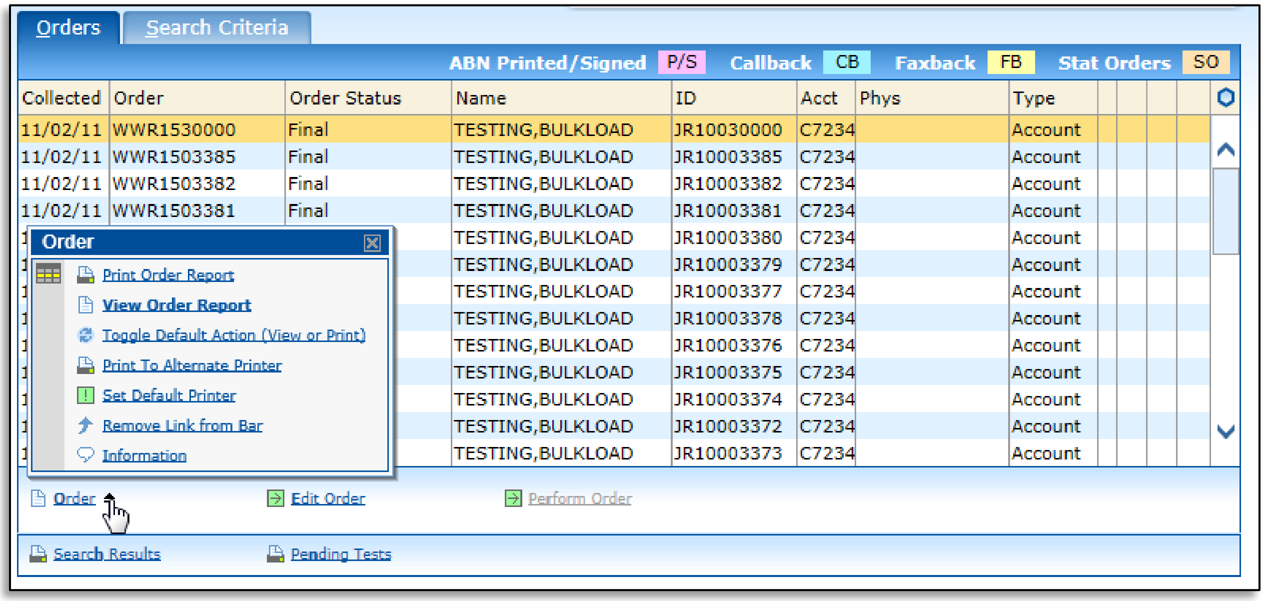
When you hover over the link, an arrow is shown to the right of the link. Click the arrow to view information about the function, to view related links or to remove that link from the SmartLinks shown.

Tip: For more information about a link, click the arrow next to the link, and then click the **Information** link.

When you remove a link from the page, you can still access the link from the SmartMenu for that section of the page. For more information, see SmartMenus on page 13.

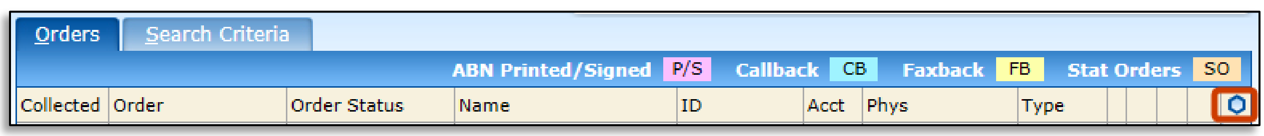
You can set the default action for many of these links. For example, when you click the arrow next to the **Order** link, a menu is shown (see the following figure).

On this menu, the **View Order Report** link is darker than the other links. This indicates that this is the default action when you click the **Order** link. You can change the default action from **View Order Report** to **Print Order Report** by clicking the **Toggle the Default Action (View or Print)** link.

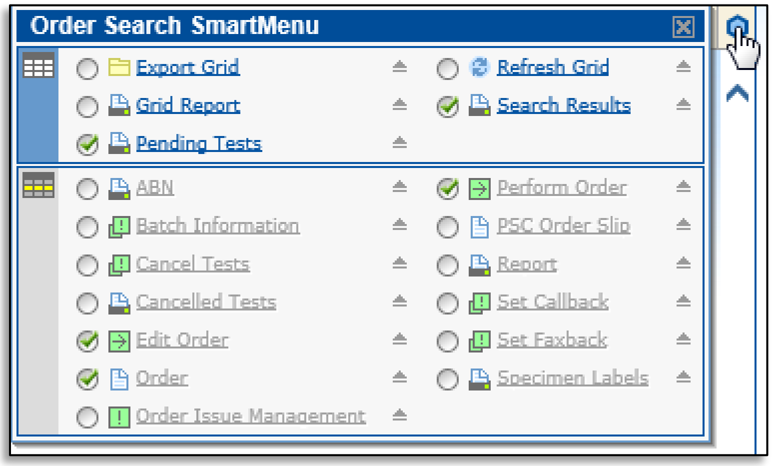


SmartMenus

Many MayoACCESS pages contain a SmartMenu. The SmartMenu function is shown as a blue hexagon icon.



When you hover over the SmartMenu icon, links that provide functions for that section of the page are shown. For example, when you hover over the SmartMenu icon on the Order Search page, an Order Search SmartMenu similar to the following is shown.



The links in the top section of the SmartMenu are functions that are performed on the entire list of Orders. The links in the bottom section of the SmartMenu are functions that are performed on the selected order.

You can click the links on the SmartMenu, or click the arrow next to a link to view information about the function, to view related links, or to add the link to the page. For more information, see SmartLinks on page 12.

Extended Frameset

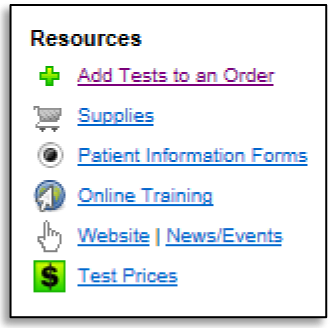
The extended frameset provides convenient access to functions that you might use frequently.

The extended frameset is divided into three sections:

Patient QuickLinks

Shortcut buttons

Resources



The following table describes each of the extended frameset options:

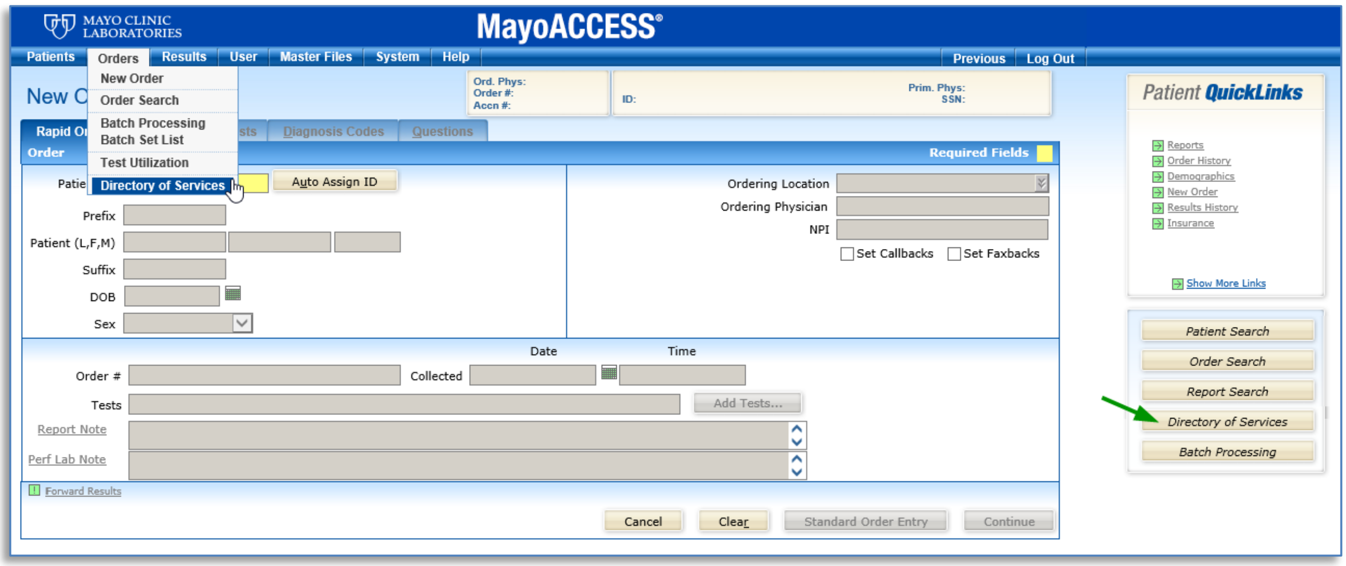
Option	Description
Patient QuickLinks	
Reports	Opens the Patient Reports page. Use this page to view the test results for the selected patient.
Order History	Opens the Order History page. Use this page to view information about all the orders for the selected patient.
Demographics	Opens the Patient Demographics page. Use this page to view and change the demographic information for the selected patient.
New Order	Opens the New Order page. Use this to order tests for the selected patient.
Results History	Opens the Results History page. Use this page to view the test results for the selected patient.
Insurance	Opens the Patient Demographics page. Use this page to view and change the insurance information for the selected patient.
Orders Pending Results	Opens the Orders Pending Results page. Use this page to view the tests that have been ordered for the selected patient, but for which results are not yet available.
Shortcut Buttons	
Patient Search	Opens the Patient Search page. Use this page to search for a specific patient.
Order Search	Opens the Order Search page. Use this page to view and search for specific orders.
Report Search	Opens the Reports page. Use this page to view and search for specific test results.
Directory of Services	Opens the Directory of Services window. Use this window to look up tests and to view detailed test information.
Batch Processing	Opens the Batch Processing page. Use this page to close a batch, to view or edit orders, to cancel tests, and to print specimen labels.

Resources	
Add Tests to an Order	Opens the Add Tests to an Order form on the Mayo Clinic Laboratories website. Use this form to request additional tests for a specimen that you sent to Mayo Clinic Laboratories.
Supplies	Opens Supplies on the Mayo Clinic Laboratories website. Use this web page to order supplies from Mayo Clinic Laboratories.
Patient Information Forms	Opens the Patient Information and Signature Forms web page on the Mayo Clinic Laboratories website. Use this web page to download and print forms that you need.
Online Training	Opens the MayoACCESS References web page on the Mayo Clinic Laboratories website. Use this web page to get information about using the MayoACCESS application.
Website	Opens the home page of the Mayo Clinic Laboratories website.
News/Events	Opens the Mayo Clinic Laboratories Blog website.
Test Prices	Opens Test Prices on the Mayo Clinic Laboratories website. Use this portal to view pricing information.

Accessing the Directory of Services

The Directory of Services lists and describes the tests that you can order. You can use any of the following methods to access the Directory of Services:

- On the **Orders** menu, click **Directory of Services**.
- In the extended frameset, click the **Directory of Services** button.
- When you enter an order, click the **Directory of Services** link.



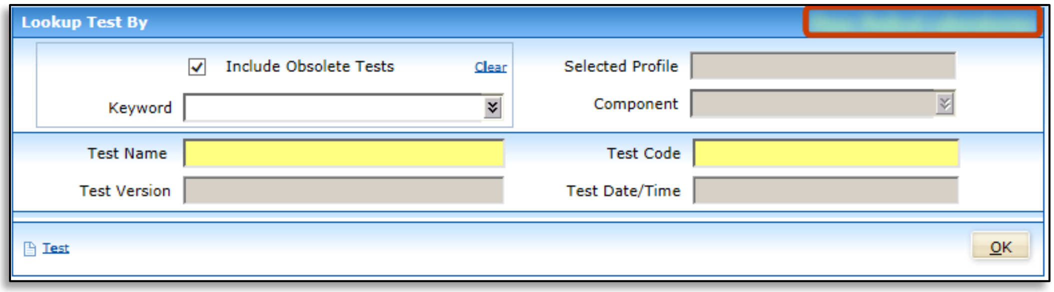
Accessing a Joint Test Catalog

If the MayoACCESS application is linked to your Joint Test Catalog (JTC), you can access the JTC from within the MayoACCESS Directory of Services. To access your JTC, follow these steps:

1. On the **Orders** menu, click **Directory of Services**.

   Tip: Alternatively, you can click the **Directory of Services** button in the extended frameset.

The Lookup Test By window is shown. The upper right corner of this window contains a link to your JTC.



2. Click the link to open your JTC in a separate window.

Searching for a Test

To locate a test, follow these steps:

1. On the **Orders** menu, click **Directory of Services**.

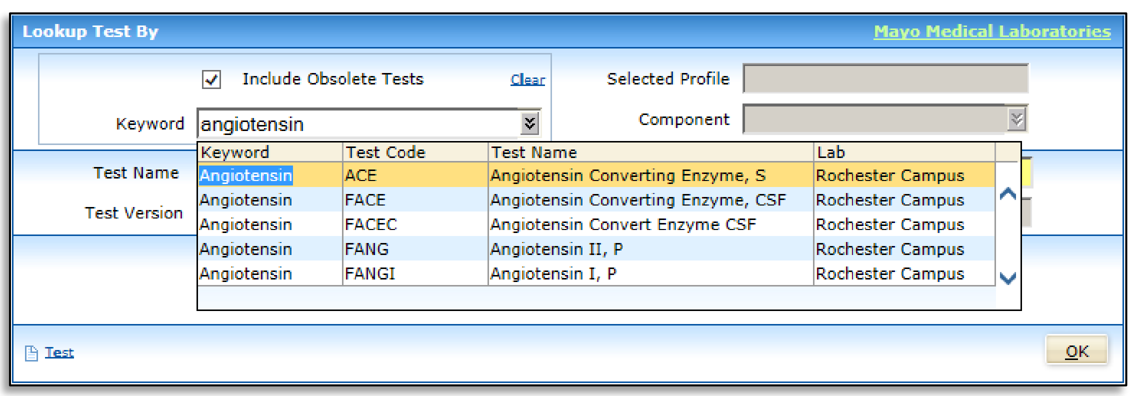
   Tip: Alternatively, you can click the **Directory of Services** button.

2. On the Lookup Test By page, enter a test name, test code, or test mnemonic in the **Keyword** text box.

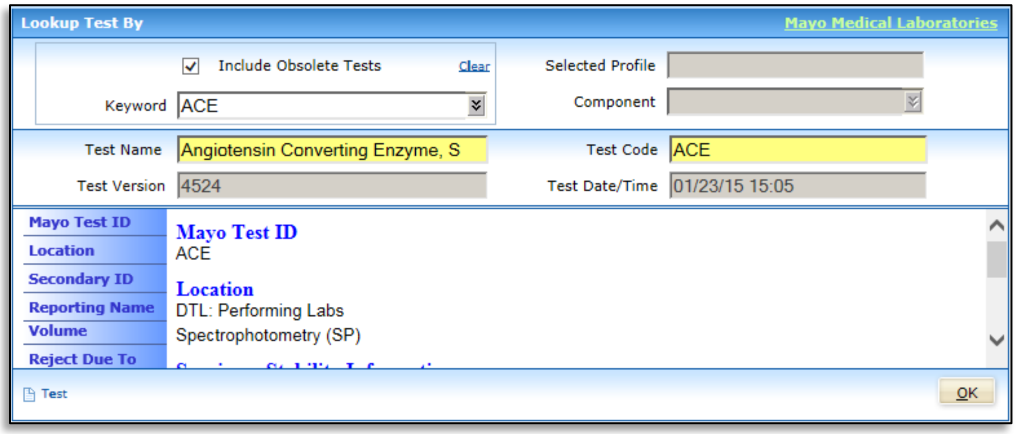
   Tip: You can click the arrow next to the text box to display a list of tests.

3. Click the arrow next to the **Keyword** text box to display the tests that match the specified test code, test name, or test mnemonic.

4. Select the test that you want from the list.



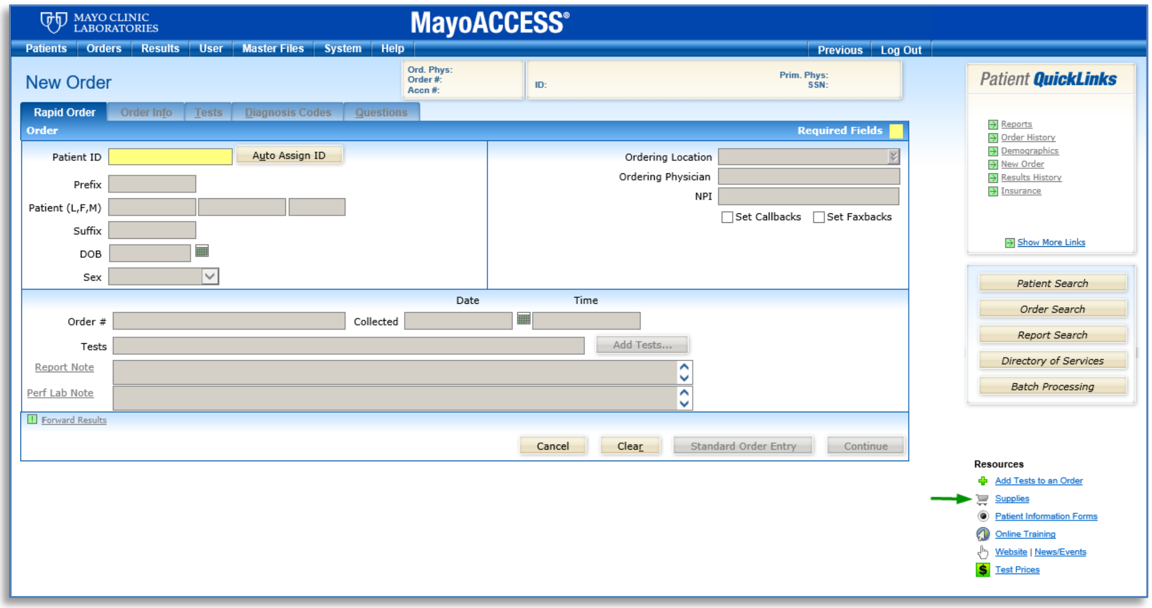
4. Detailed information about the selected test is shown.



Tip: You can either scroll to see all the information about the test or click a heading in the navigation to display that section of the test information.

Ordering Supplies

You can order specimen collection and shipping supplies for your test orders from Mayo Clinic Laboratories Supplies. Use these supplies to send specimens only to Mayo Clinic Laboratories. You can access Supplies from the MayoACCESS application by clicking the **Supplies** link in the extended frameset.



The Supplies web page is shown. For information about ordering supplies, see the Frequently Asked Questions on this web page.

Managing Patient Information

This section contains information about the following tasks:

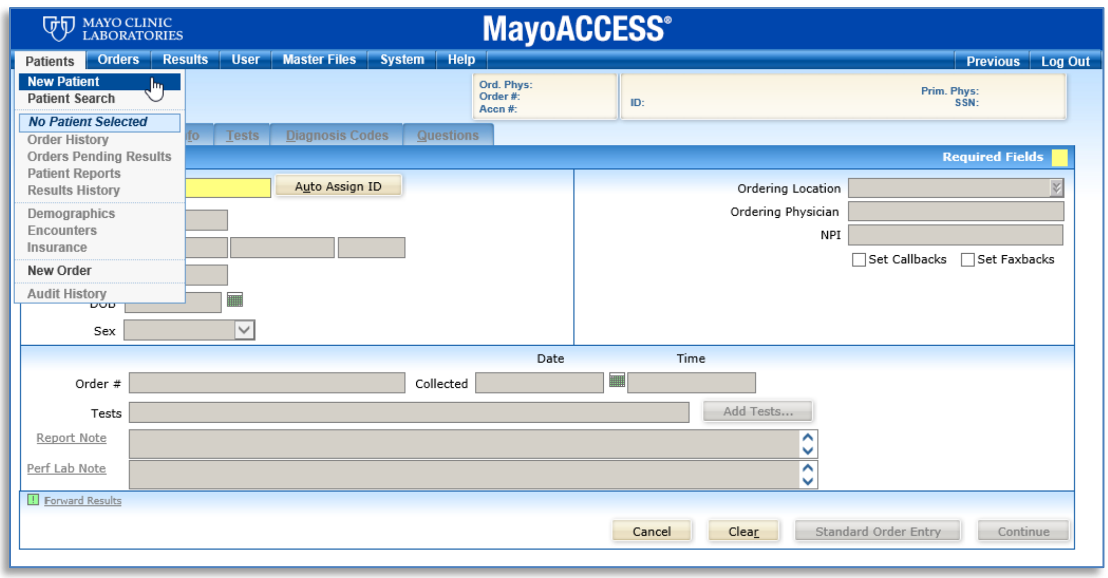
- Creating a patient record
- Searching for a patient record
- Changing patient information

Creating a Patient Record

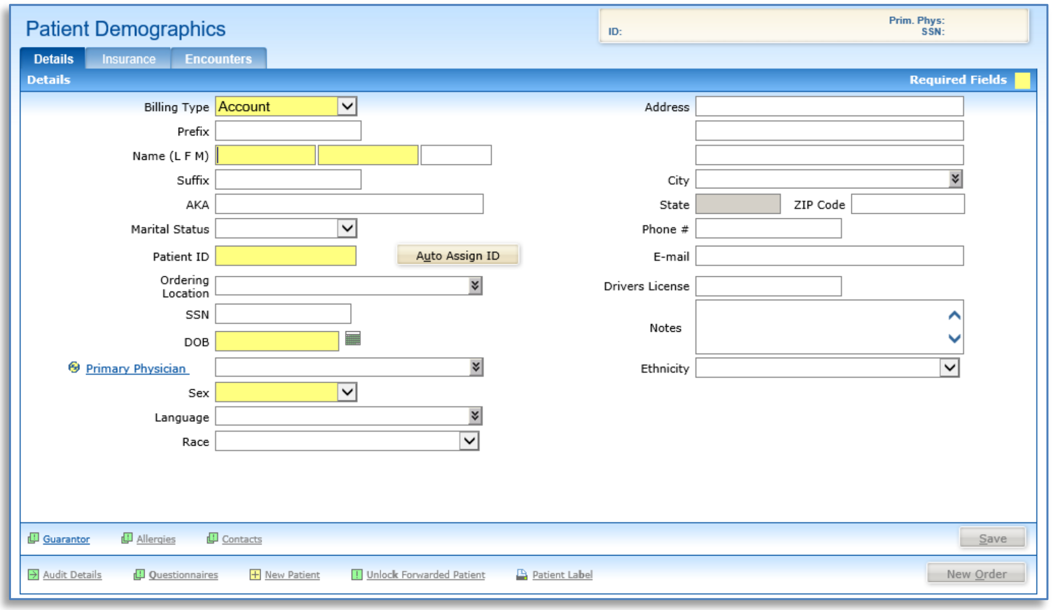
To create a patient record, follow these steps:

1. On the **Patients** menu, click **New Patient**.

   Tip: Alternatively, you can click the **New Patient** link on the Patient Search page.

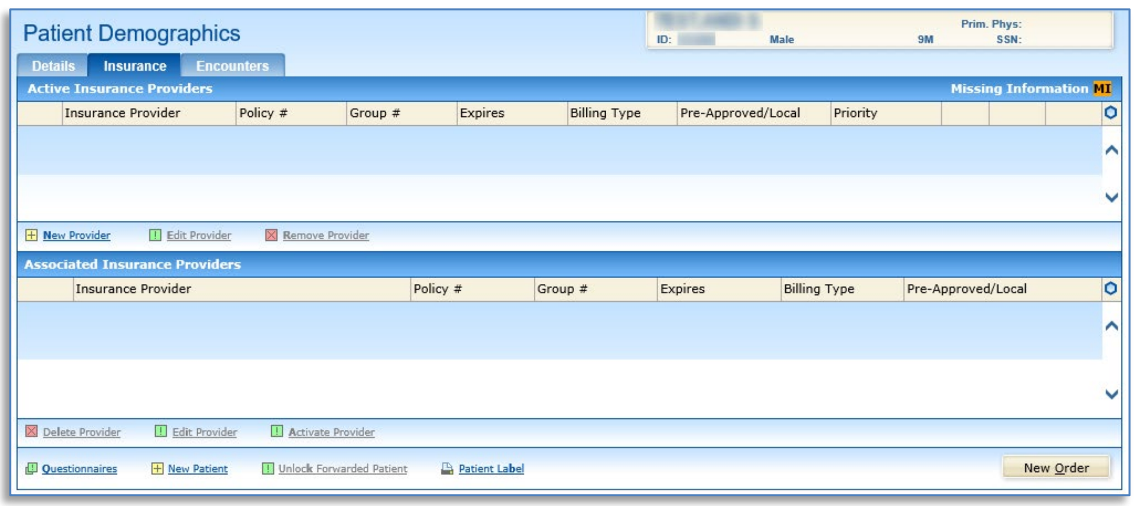


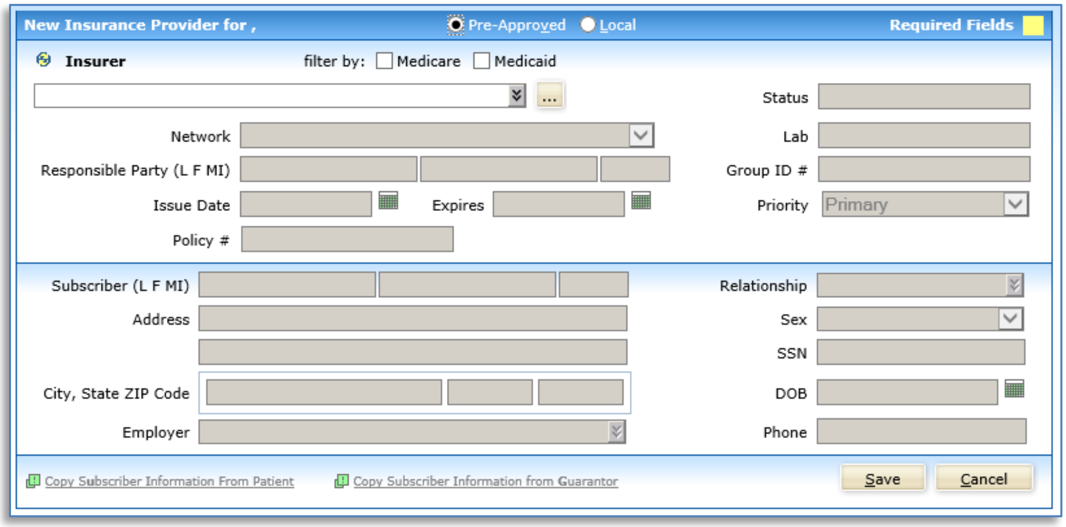
2. On the Patient Demographics page, click the **Details** tab.
3. On the Details page, specify the information for this patient, including the patient's address, city, state, and zip code. The highlighted fields indicate information that is required.



For more information about the fields on this page, go to Patient Details on page 28.

4. To specify third-party billing for this patient, select **Insurance** for the **Billing Type**.
5. To view third-party billing for this patient, click the **Insurance** tab.





6. On the Insurance page, you can view the primary insurance information for this patient.
7. If the patient has a secondary insurer, click **Show Secondary Insurer** to view the insurance information.
8. Click **Save**.

   From this page, you can click **New Order** to order a test for this patient.

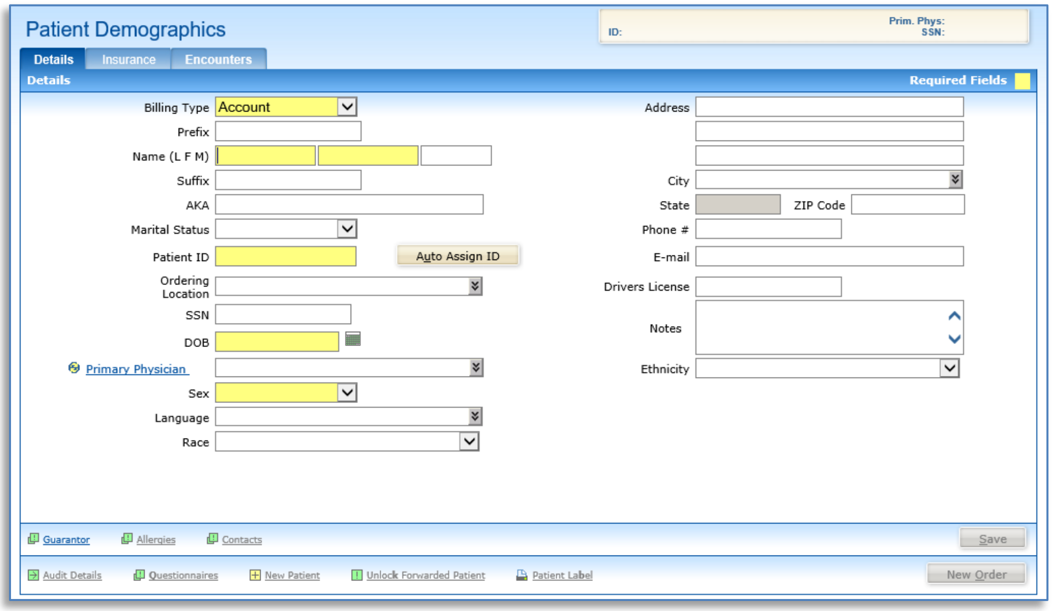
The Patient Demographics page also contains the following links:

Link	Description
Guarantor	Guarantor information for the patient
Allergies	Allergy information for the patient
Contacts	Emergency contact information for the patient
Questionnaires	Questionnaires for the patient
New Patient	Link to add a patient
Patient Label	Label that shows patient information

Tip: For more information about each of these links, click the arrow next to the link name, and then click the **Information** link.

Patient Details

To display the detailed demographic information for the patient, click the **Details** tab on the Patient Demographics page.



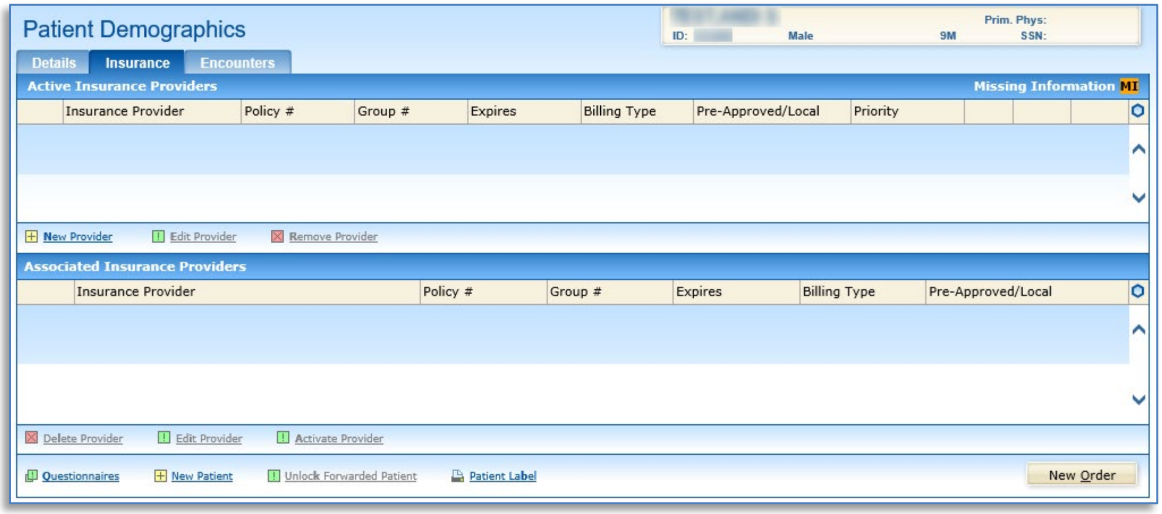
The following table provides instructions for completing the information on this page:

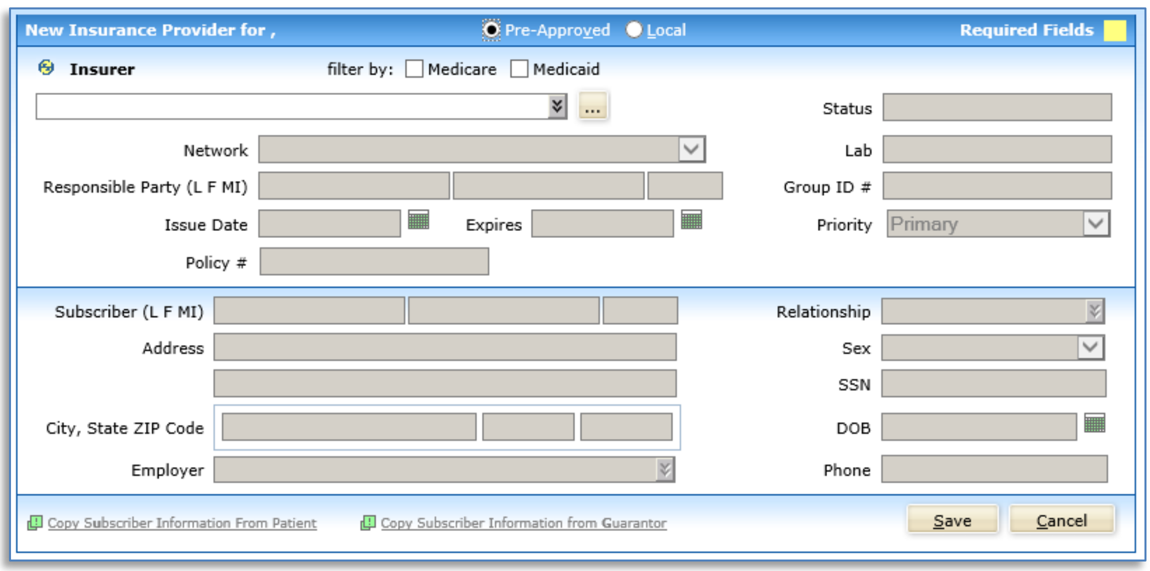
Field	Instructions
Billing Type	Select **Account** to bill the test to the client. Select **Medicare** to bill the test to Medicare or Medicaid. Select **Insurance** to bill the test to patient insurance.
Prefix	Enter a title for the patient, such as Mr., Mrs., or Miss.
Name (L F M)	Enter the last name, first name and, if applicable, the middle initial or middle name for the patient.
Suffix	Enter a title for the patient, such as Sr. or Jr.
AKA	Enter any other name that the patient uses, such as a nickname or a maiden name.
Marital Status	Select the patient’s marital status from the drop-down list.
Patient ID	Enter an identification number for the patient. **Tip:** Click **Auto Assign ID** to generate a new patient identification (ID) number.

Field	Instructions
Ordering Location	If specified, all orders for the patient will default to the selected location.
SSN	Enter the patient's social security number.
DOB	Specify the patient's date of birth.
Primary Physician	Select or enter the name of the patient's primary physician. **Tip:** To enter the information for a physician, click the **Primary Physician** link. For instructions, see Creating a Physician Record on page 103.
Sex	Select the patient's sex from the drop-down list.
Language	Patient's primary language (not used).
Race	Patient's race (not used).
Address	Enter the patient's home address.
City	Specify the patient's city of residence. **Tip:** Enter the patient's zip code to automatically complete the **City** and **State** fields.
State	Enter the patient's state of residence.
ZIP Code	Enter the patient's zip code.
Phone Number	Enter the patient's telephone number.
E-mail	Enter the patient's e-mail address.
Drivers License	Enter the patient's driver's license number.
Notes	Enter any other relevant information about the patient.
Ethnicity	Patient's nationality (not used).

Patient Insurance

To display the insurance information for the patient, click the **Insurance** tab on the Patient Demographics page. This page contains the patient's primary and secondary insurance information.





Searching for a Patient Record

To locate a patient record, follow these steps:

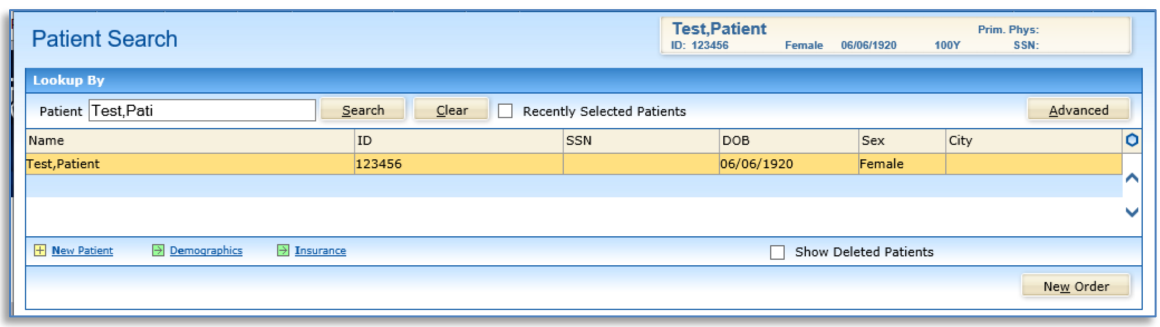
1. On the **Patients** menu, click **Patient Search**.

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

2. In the **Patient** text box on the Patient Search page, enter either the ID number or the first few characters of the patient's last name.
3. Click **Search.**

   Tips:

   - If you are unsure of the ID number or the spelling of the patient's last name, enter just the letters or numbers that you know. The search results contain all the patient records that match the numbers or letters that you specify. For example, if you enter TES in the **Patient** text box, and then click **Search,** all patients with last names or records that begin with TES are shown.
   - To display patient records that were recently opened, click the **Recently Selected Patients** check box.



To order a test for that patient, select the patient record, and then click **New Order**. To view patient demographics or insurance information, click the **Demographics** or **Insurance** link.

Changing Patient Information

To change patient information, follow these steps:

1. On the **Patients** menu, click **Patient Search**.

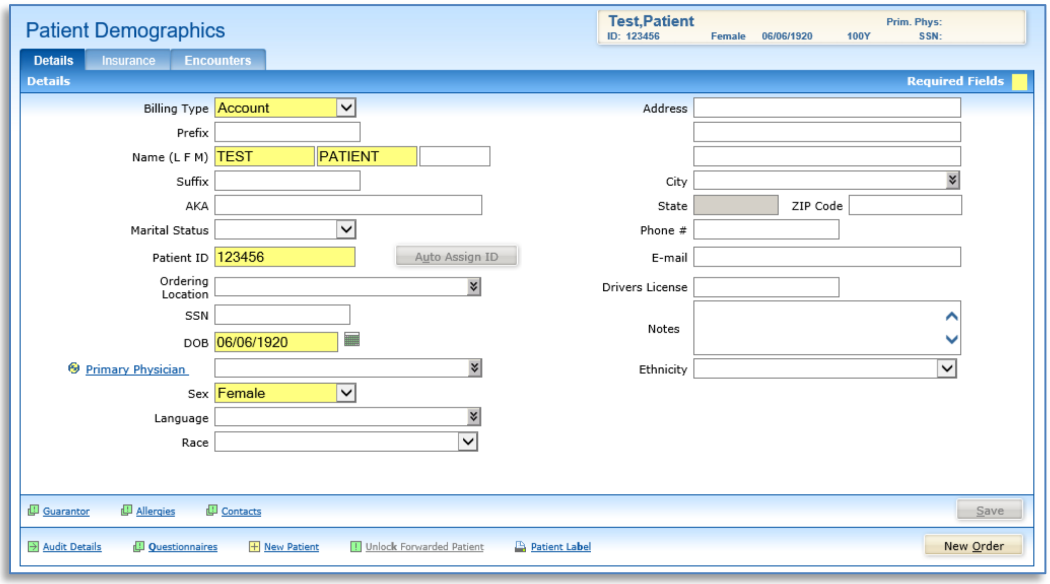
   For information about searching, see Searching for a Patient Record on page 30.
2. Select the patient for whose record that you want to change
3. To change the patient's demographics, click the **Demographics** link.

   Tip: You can access this page by clicking **Demographics** on the **Patients** menu.

4. To change the patient’s insurance information, click the **Insurance** link.

   Tip: You can access this page by clicking **Insurance** on the **Patients** menu.

5. On the Patient Demographics page, change the values in any of the fields on the Details or Insurance pages. To switch between the pages, click the **Details** or **Insurance** tab.



6. To change additional information, click the appropriate link at the bottom of the page. For example, you might want to change the address on the page, and then click the **Guarantor** link to change the address for the guarantor for this patient.

   Tip: To view information about any of the links, click the arrow next to the link name.

   Note: If the patient's name is dimmed, this means that pending reports are still open for this patient and that the patient name cannot be changed until the report is final.

7. Click **Save**.

Ordering a Test

To order a test, you need the following information:

- The patient name that the test is for
- The physician who is ordering the test
- The test name or test code

Use one of the following methods to order a test:

- Rapid Order Entry

  Use this method if you do not use a short list or a custom profile.

- Standard Order Entry

  Use this method if you want to select a test from a short list or select a custom profile.

  For information about short lists, see Creating a Short List of Frequently Ordered Tests on page 123.

  For information about custom profiles, see Creating a Custom Profile on page 121.

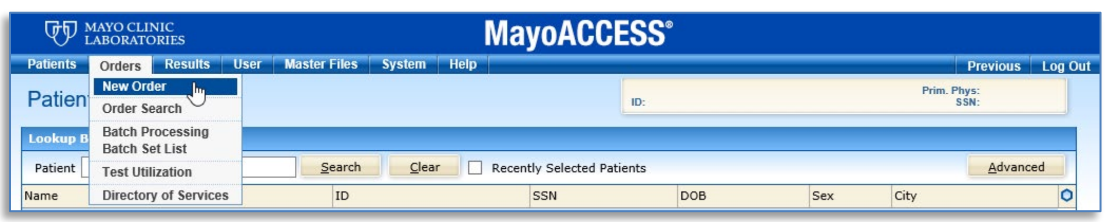
You can also order a test when the MayoACCESS application is not available. The following topics describe how to use these methods for ordering a test.

Ordering a Test by Using Rapid Order Entry

Use this method for ordering a test if you are not selecting a test from a short list or ordering a custom profile. To order a test, follow these steps:

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

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

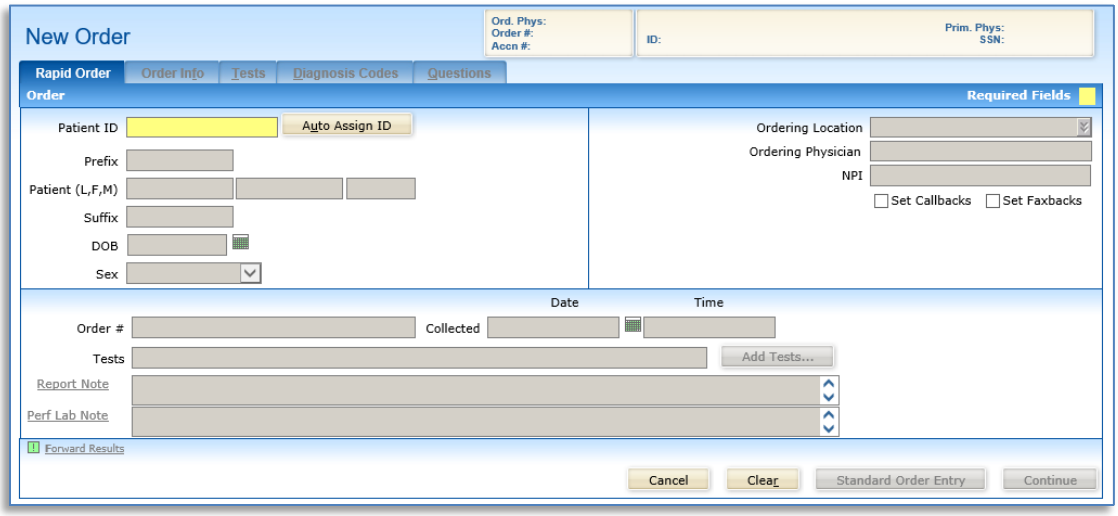
   

2. In the **Patient ID** text box on the New Order page, enter the ID number for the patient and press Enter to display the information for that patient.

   Notes:

   - If you are ordering a test for a new patient, you must enter all the required information for the new patient. The highlighted fields indicate information that is required. For detailed information about the fields, see Creating a Patient Record on page 25.

- Alternatively, you can search for a patient name or ID, and then click **New Order** on the Patients page. For information about searching, see Searching for a Patient Record on page 30.



3. Verify that the patient information is correct.

   If necessary, you can update the information on this page. The information will be updated for this patient when you save the order.

   For information about changing the patient information, see Changing Patient Information on page 31.

4. In the **Ordering Location** text box, verify that the ordering location is correct.

5. Specify the following information for this order. Required information is indicated with highlighted fields on the page.

Field	**Instructions**
Ordering Physician	Specify the name of the physician who ordered the test.
NPI	Specify the National Provider Identifier for the physician who ordered the test.
Set Callbacks	Request a phone call with the test results.
Set Faxbacks	Request a fax with the test results.
Order #	Specify your order number or Laboratory Information System (LIS) accession number. This number is used to track the status of the order.
Collected Date	Specify the date that the specimen was collected.

Field	Instructions
	Tip: You can enter `T` for today's date, or `T-`*`n`* for a past date where *n* is the number of days before today. For example, enter `T-1` for yesterday's date.
Collected Time	Specify the time, in military form, that the specimen was collected. **Tip:** You can enter `N` for the current time.
Report Notes	Specify any notes that you want to display on the laboratory service report.
Performing Lab Notes	Specify any notes that you want to send to Mayo Clinic Laboratories. These notes are stored with the order.

6. Use one of the following methods to specify the test that you want to order.
   - Enter a test ID in the **Tests** text box.

     Note: You can enter more than one test ID by separating the test IDs with commas. For example, enter the following:

     ACE,HISTO,PBBD
   - Click **Add Tests** to select the test from the Directory of Services.

     For information about selecting a test from the Directory of Services, see Searching for a Test on page 20.
7. Click **Continue**.

   A message is shown that contains the order number and accession number.
8. Click **OK**.
9. If you clicked the **Set Callbacks** check box, the Callback settings dialog box is shown. Specify the callback settings for this test. For information, see Specifying Callbacks on page 42.
10. If you clicked the **Set Faxbacks** check box, the Faxback settings dialog box is shown. Specify the faxback settings for this order. For information, see Specifying Faxbacks on page 44.
11. To specify another order at this time, go to step 2. Otherwise, click **Cancel**.

This order must be placed in a batch and the batch must be closed before the order is submitted to Mayo Clinic Laboratories. For instructions, see Batching Test Orders on page 61.

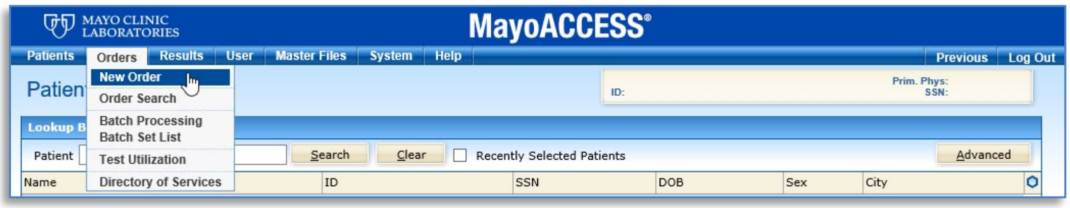
Ordering a Test by Using Standard Order Entry

Use this method for ordering a test if you want to select a test from a short list or select a custom profile. For information about short lists, see Creating a Short List of Frequently Ordered Tests on page 123. For information about custom profiles, see Creating a Custom Profile on page 121.

To order a test, follow these steps:

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

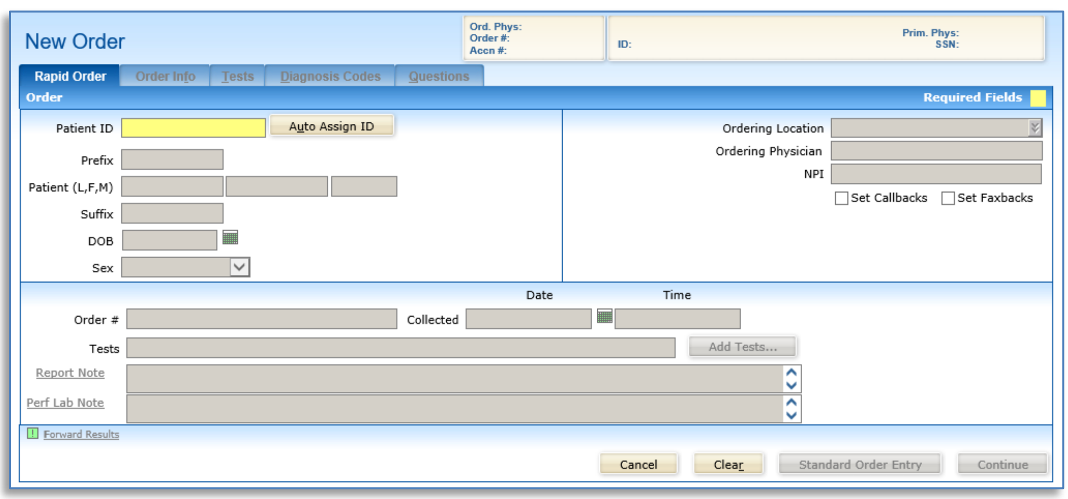
   Tip: Alternatively, you can click the **New Order** link in the extended frameset.



2. In the **Patient ID** text box on the New Order page, enter the ID number for the patient and press Enter to display the information for that patient.

   Notes:

   - If you are ordering a test for a new patient, you must enter all the information for the new patient. For detailed instructions, see Creating a Patient Record on page 25.
   - Alternatively, you can search for a patient name or ID, and then click **New Order** on the Patients page. For instructions, see Searching for a Patient Record on page 30.



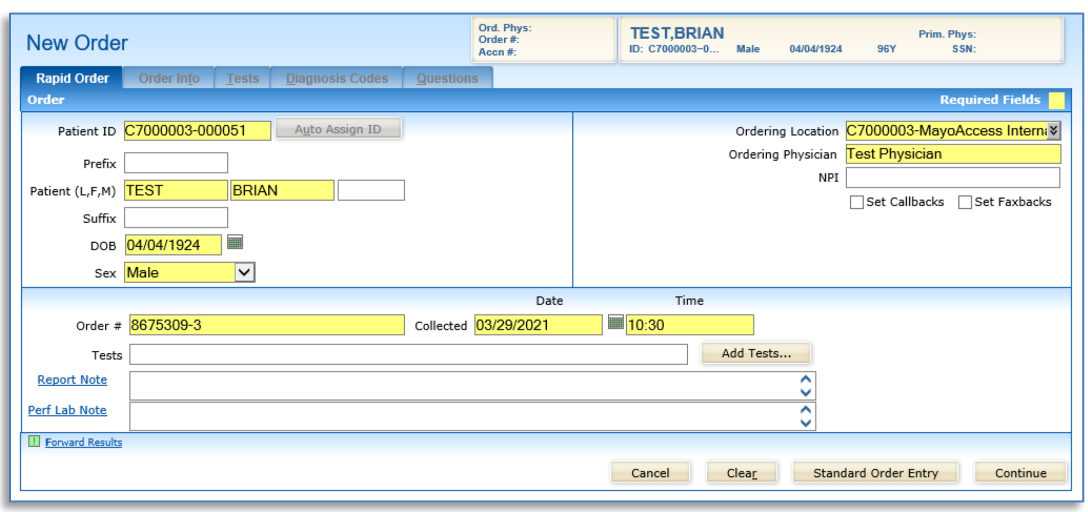
3. Verify that the patient information is correct.

   For instructions, see Changing Patient Information on page 31.

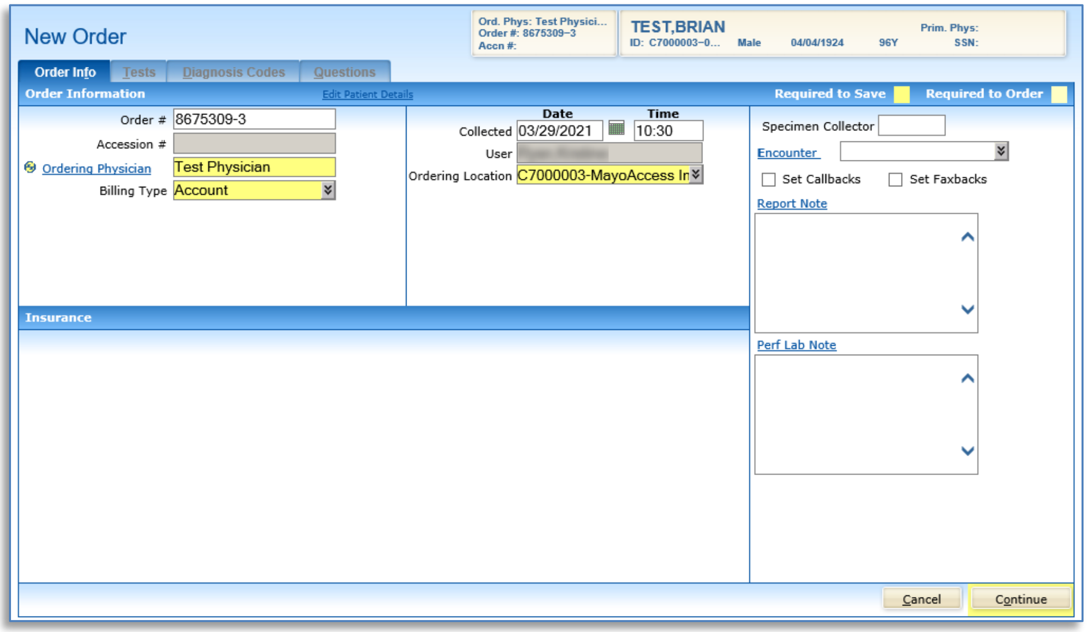
4. In the **Ordering Location** text box, verify that the ordering location is correct.
5. Specify the following information for this order. Required information is indicated with highlighted fields on the page.

Field	Instructions
Ordering Physician	Specify the name of the physician who ordered the test.
Set Callbacks	Request a phone call with the test results.
Set Faxbacks	Request a fax with the test results.
Order #	Specify your order number or Laboratory Information System (LIS) accession number. This number is used to track the status of the order.
Collected Date	Specify the date that the specimen was collected. **Tip:** You can enter `T` for today's date, or `T+n` for a future date where *n* is the number of days from today. For example, enter `T+1` for tomorrow's date.
Collected Time	Specify the time, in military format, that the specimen was collected. **Tip:** You can enter `N` for the current time.
Report Notes	Specify any notes that you want to display on the laboratory service report.
Performing Lab	Specify any notes that you want to send to Mayo Clinic Laboratories. These notes are stored with the order.

6. Click Standard Order Entry.



The Order Information page is shown.



Tip: To change patient information, click the **Edit Patient Details** link. For information about changing the patient information, see Changing Patient Information on page 31.

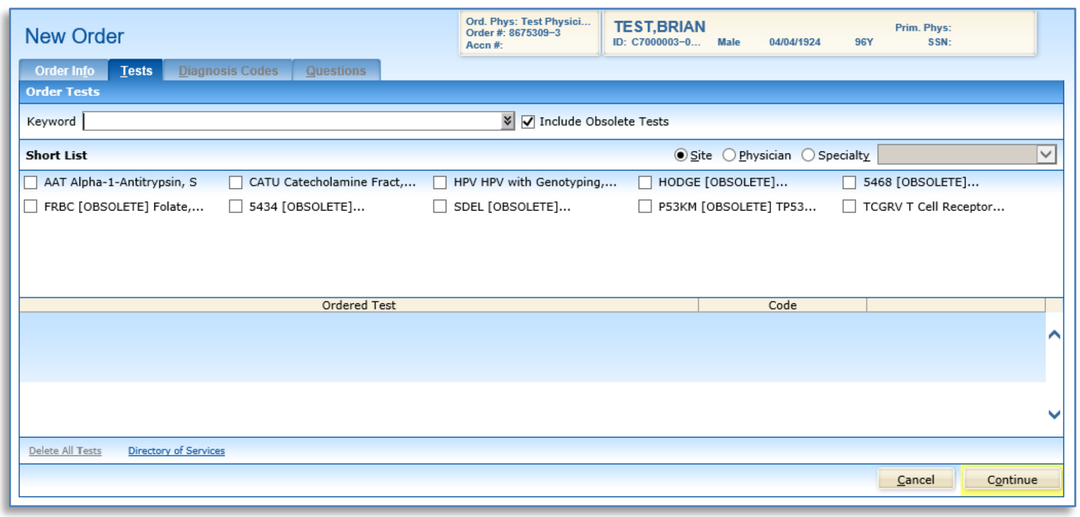
7. From the **Billing Type** drop-down list, select from the following options:
    - To bill the test to the client, select **Account**.
    - To bill the test to Medicare or Medicaid, select **Medicare**.
    - To bill the test to the patient's insurance company, select **Insurance.**
8. Enter additional information as needed.
9. Click **Continue.**

10. On the Tests page, to specify the test that you want to order, use one of the following methods:

    - In the **Keyword** text box, enter a test name, test code, or test mnemonic, and click the arrow next to the text box to display the tests that match the keyword.
    - Click the **Directory of Services** link to select the test from the Directory of Services.

      For information about selecting a test from the Directory of Services, see Searching for a Test on page 20.
    - Select one or more tests in the **Short List** group box.

      Note: The short list contains the 25 most recent tests.
    - Click **Custom Profiles**, and then select one or more profiles in the **Short List (Custom Profiles)** group box.



11. Click **Continue.**

    A message is shown that contains the order number and accession number.
12. Click **OK**.
13. If you selected the **Set Callbacks** check box, specify the callback settings for this order.

    For instructions, see Specifying Callbacks on page 42.
14. If you selected the **Set Faxbacks** check box, specify the faxback settings for this order.

    For instructions, see Specifying Faxbacks on page 44.
15. To specify another order at this time, go to step 2. Otherwise, click **Cancel**.

This order must be placed in a batch and the batch must be closed before the order is submitted to Mayo Clinic Laboratories. For instructions, see Batching Test Orders on page 61.

Ordering a Test When MayoACCESS Is Unavailable

Mayo Clinic Laboratories provides a Downtime Form so that you can order tests if the MayoACCESS application is not available. It is a good practice to print and store copies of the form.

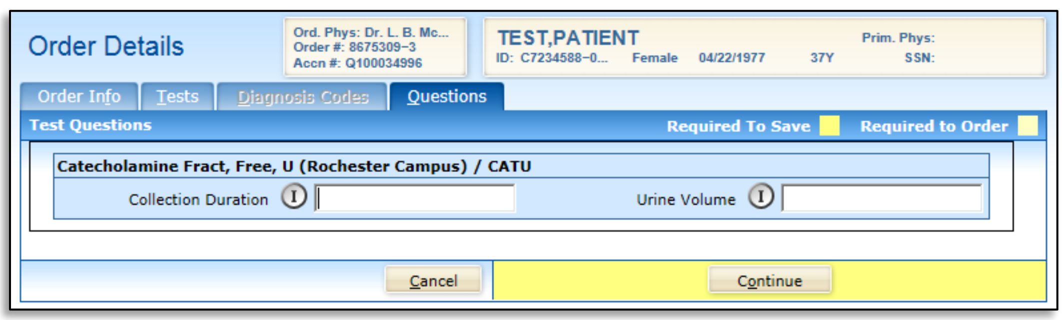
To access the Downtime Form, follow these steps:

1. Access the Downtime Form on the Mayo Clinic Laboratories website (Mayocliniclabs.com/customer-service/forms/downtime.html).
2. On the MayoACCESS Downtime Form page, click the **MayoACCESS Downtime Form** link.
3. Print the form.
4. Complete the form.
5. Send the form with the specimen to Mayo Clinic Laboratories.

Answering Test Questions

If additional information is required for the test you ordered, or if the test must be performed under specific conditions, the Test Questions page is shown. To specify this additional information, follow these steps:

1. Enter the required information, and then click **Continue**.



   A message is shown that contains the order number and the accession number.

2. Click **OK**.

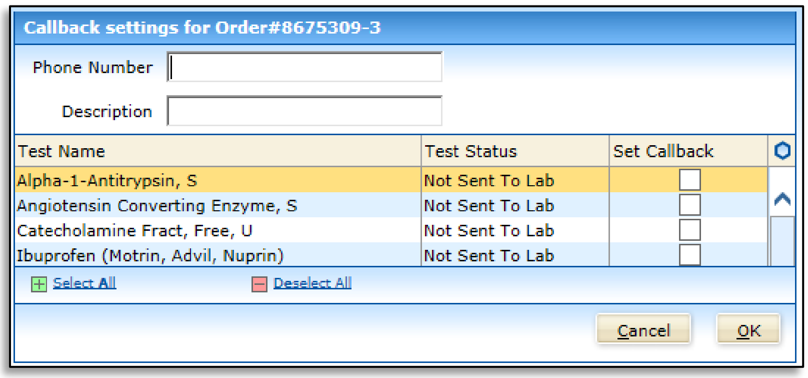
Specifying Callbacks

If you specified that you want a phone call when test results are available, the Callback settings dialog box is shown. To specify the callback information, follow these steps:

1. In the **Phone Number** text box, enter the number that you want to use for receiving the test results. The following examples show a United States phone number and an International phone number:

   United States: 5072842118

   International: 01161294375420



2. **Optional:** Enter information about the callback number in the **Description** text box. This information is shown in the InfoLink message.
3. In the Set Callback column, click the check box next to each test for which you want a phone call when test results are available.
4. Click **OK**.

For information about specifying callbacks when you order a test, see Ordering a Test by Using Standard Order Entry on page 38.

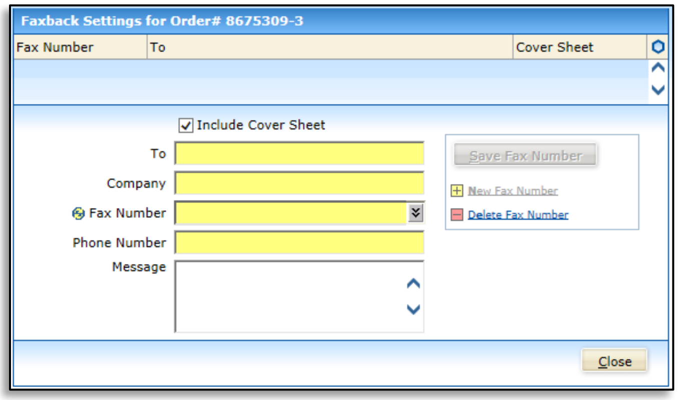
To add callback information to a completed or integrated test order, follow the steps in Changing an Order before Closing the Batch on page 55, and then click the **Set Callbacks** check box on the Order Information page.

Specifying Faxbacks

If you specified that you want a fax when test results are available, the Faxback Settings dialog box is shown. To specify the faxback information, follow these steps:

1. Click the **New Fax Number** link.

   The fields are filled with the values defined for your account.



2. Confirm that the fax information is correct.

   Note: The fax number must include a country code, if applicable, and the area code.

3. If necessary, change the fax information or add a new fax number, and then click **Save Fax Number**.
4. **Optional:** Enter a message in the **Message** text box. This message is shown on the fax cover sheet.
5. Click **Close.**

For information about specifying faxbacks when you order a test, see Ordering a Test by Using Standard Order Entry on page 38.

To add faxback information to a completed test order, follow the steps in Changing an Order before Closing the Batch on page 55, and then click the **Set Faxbacks** check box on the Order Information page.

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.

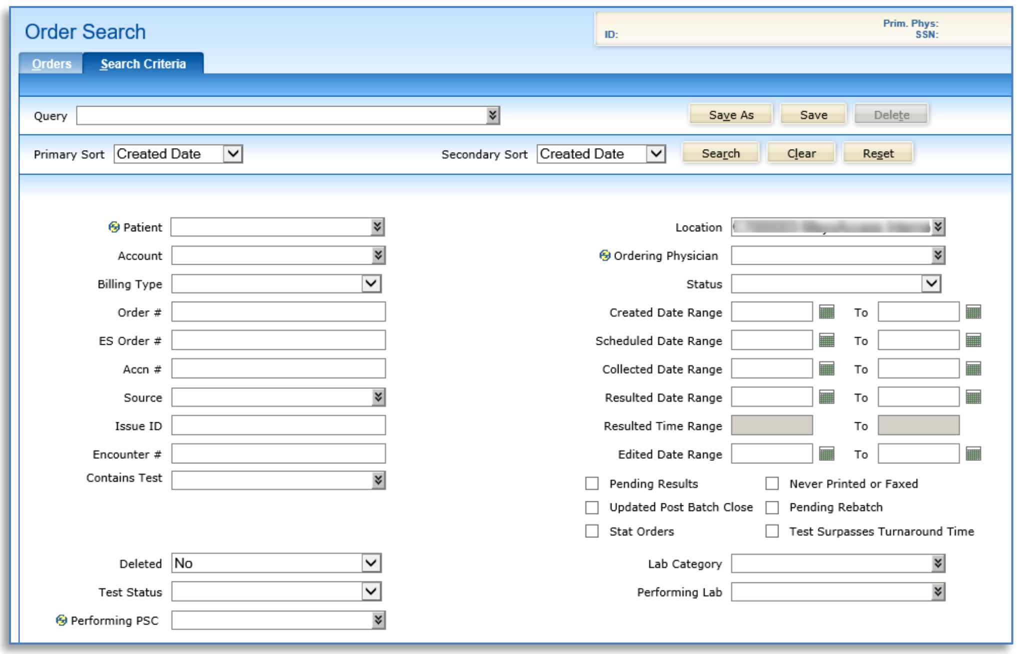
Searching for an Order

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 Receipted, 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:

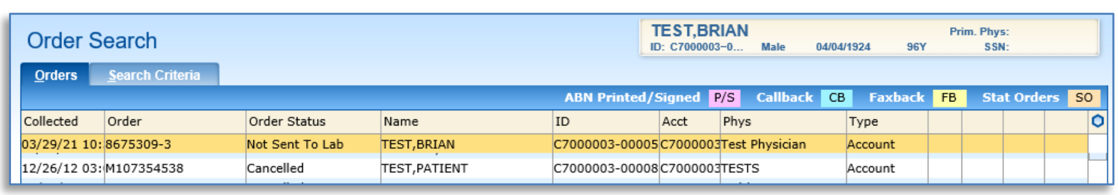
1. On the **Orders** menu, click **Order Search**.

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

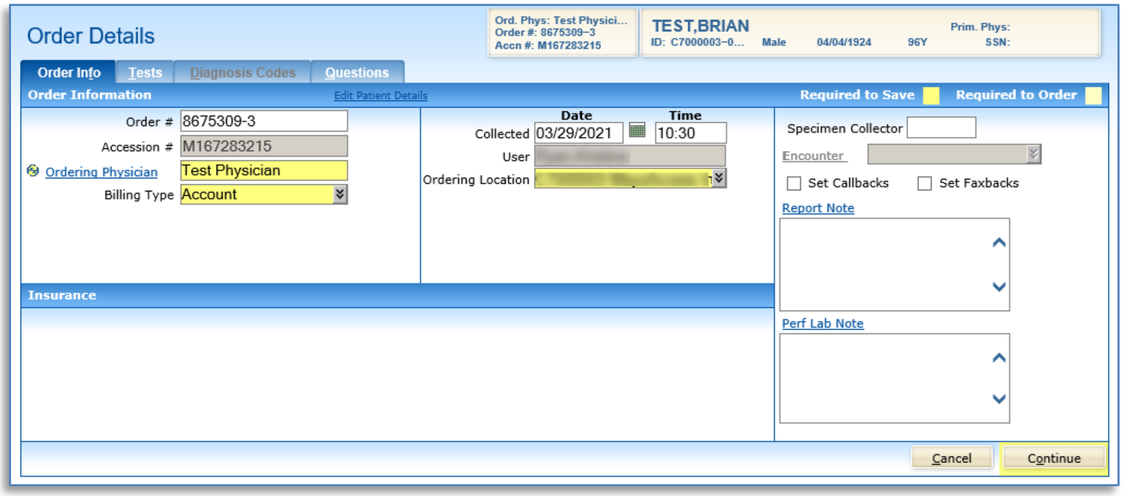
2. On the Order Search page, select the order to which you want to add a test.

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

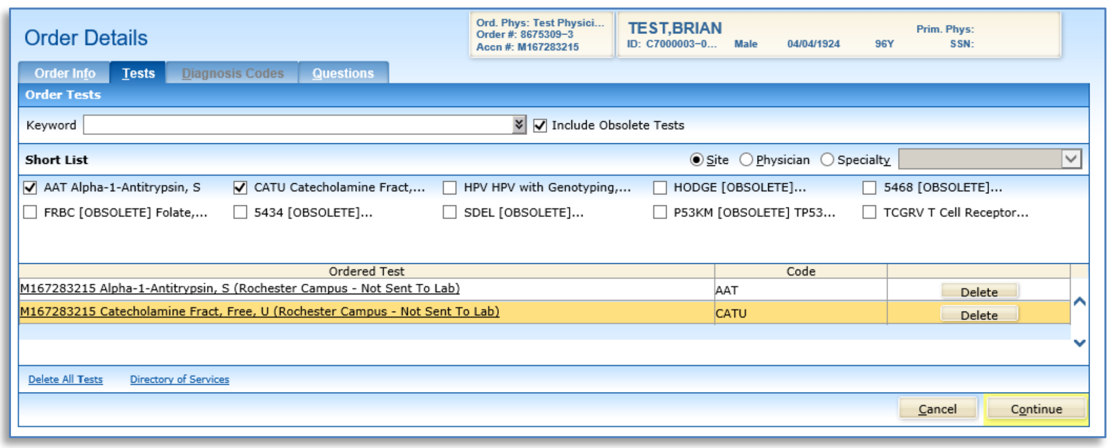
3. Click the **Edit Order** link.



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

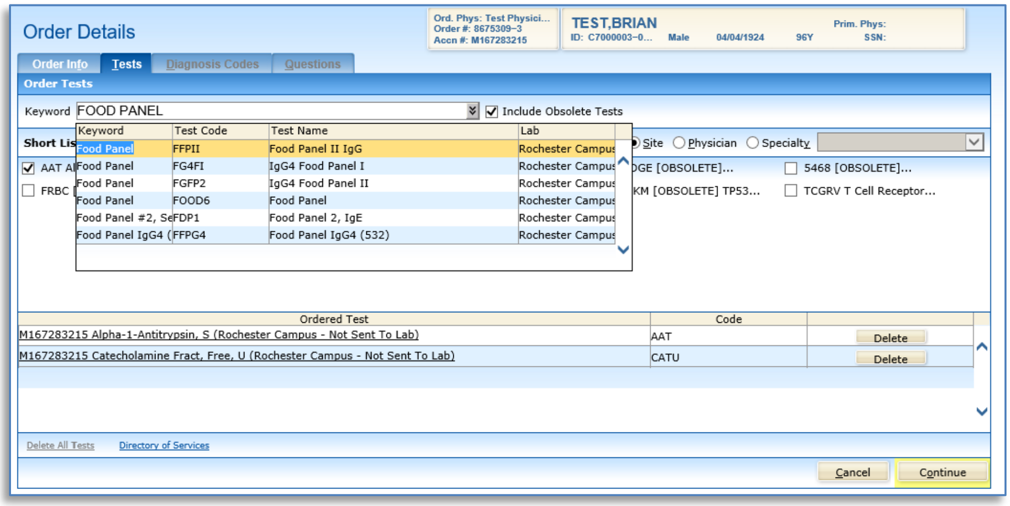


5. On the Tests page, in the **Tests** text box, enter the test name, test code, or test mnemonic for the test that you want to add to the order.



6. 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.

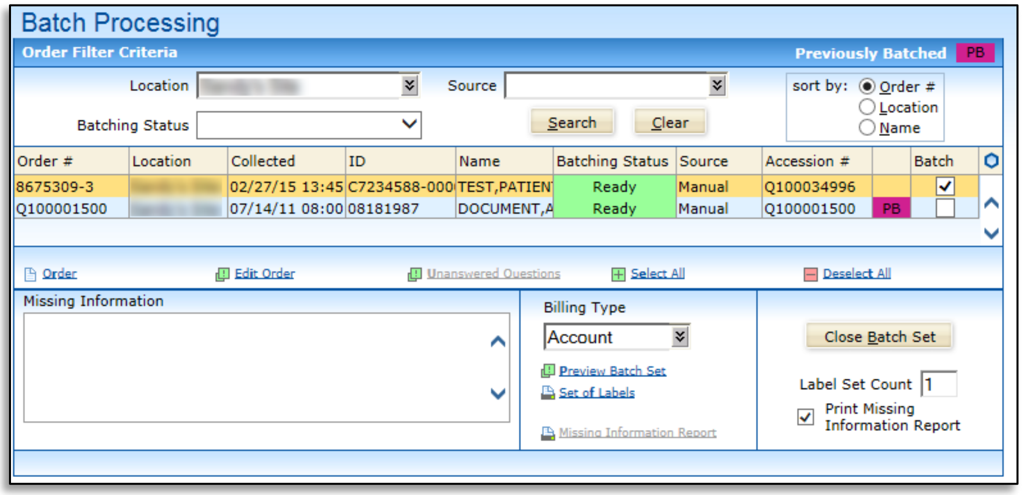
   After you add a test to the order, you must batch the order again.

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.

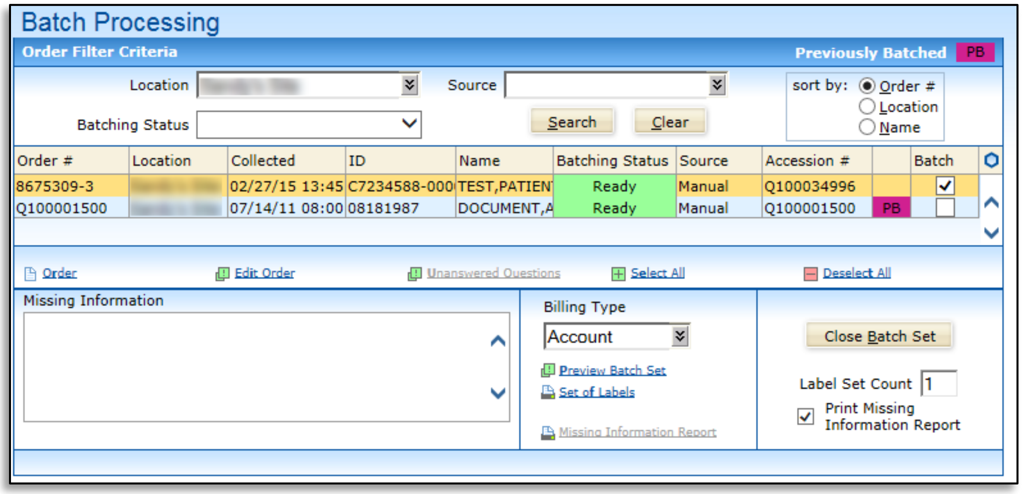
   Next, you must batch the updated order.

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: C7*xxxxxx*
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.**

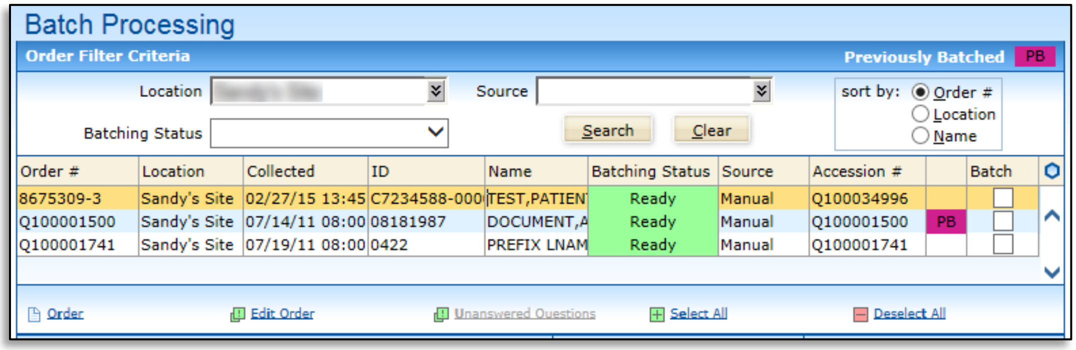
Changing an Order before Closing the Batch

To change an order, follow these steps:

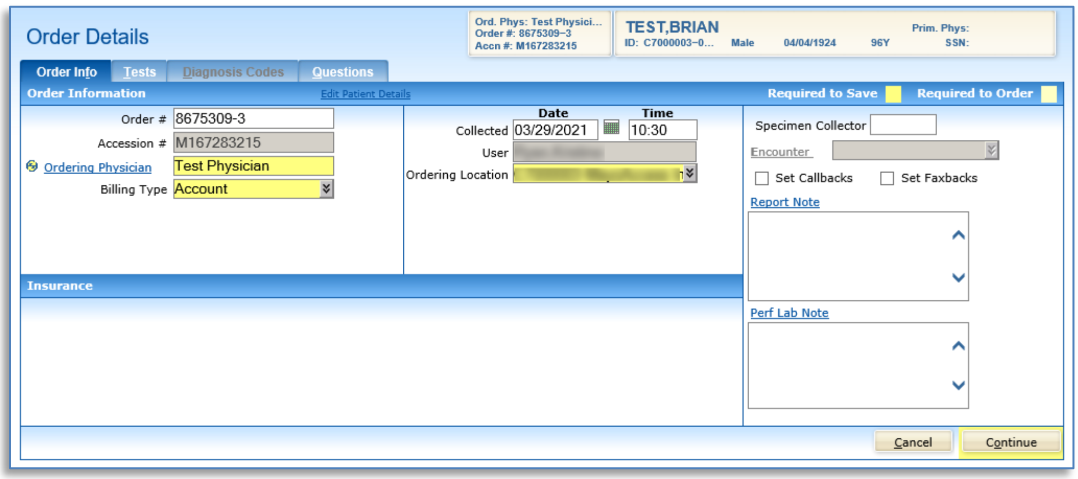
1. On the **Orders** menu, click **Batch Processing**.

   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.



The Order Details page is shown.



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

5. 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.

6. When you are finished changing the order, click **Continue**.

   A message is shown confirming that the order is saved.

7. Click **OK**.

8. 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.

9. 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.

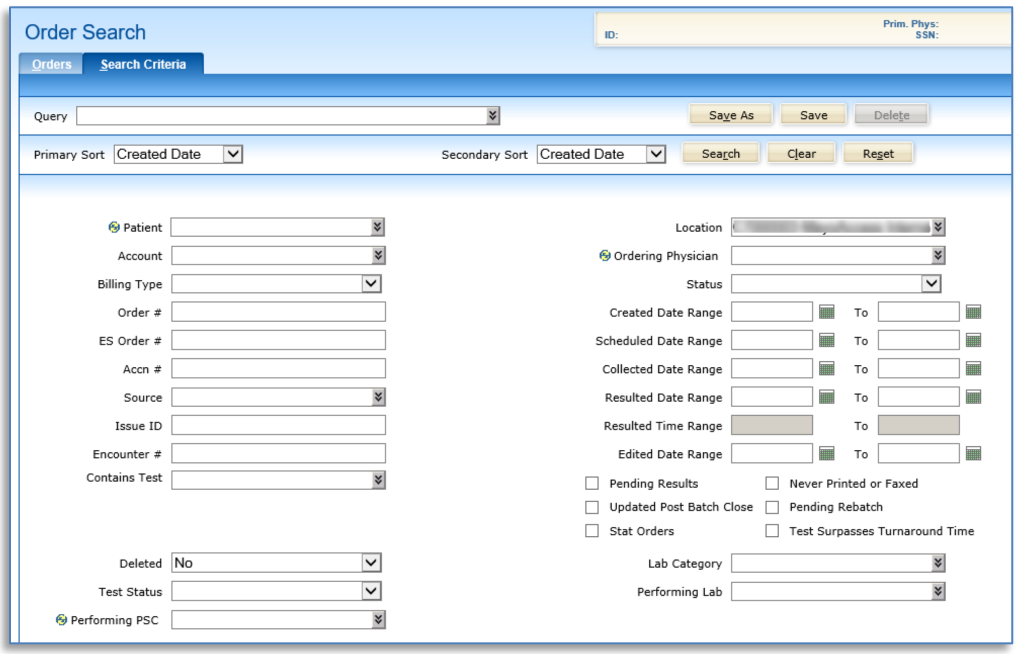
Cancelling a Test

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.



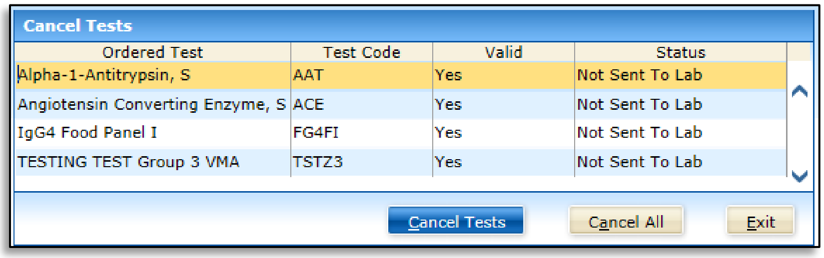
4. Click **Search**.

   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.

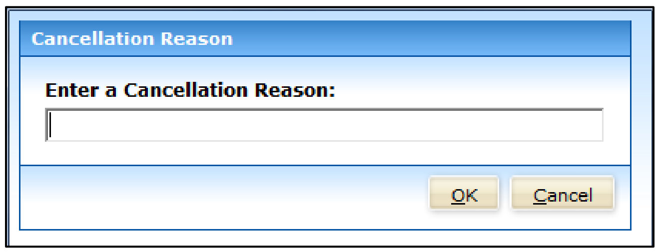
7. In the Cancel Tests dialog box, select the test that you want to cancel.



8. Click **Cancel Tests**.

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

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



10. Click **OK**.

    A message confirming the test cancellation is shown.

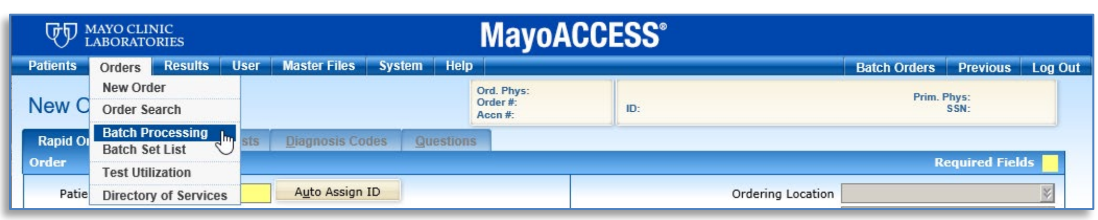
11. Click **OK**.
12. To cancel additional tests, repeat steps 7 - 11.
13. Click **Exit**.

Cancelling an Order

To cancel an order, follow these steps:

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

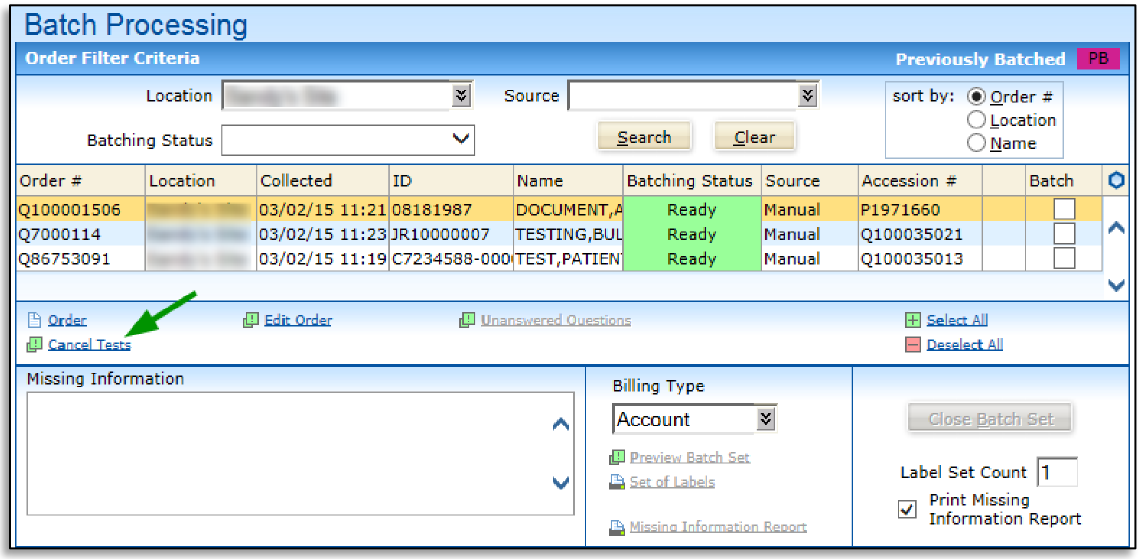
   Tip: Alternatively, you can click **Batch Orders** on the menu bar or **Batch Processing** in the extended frameset.



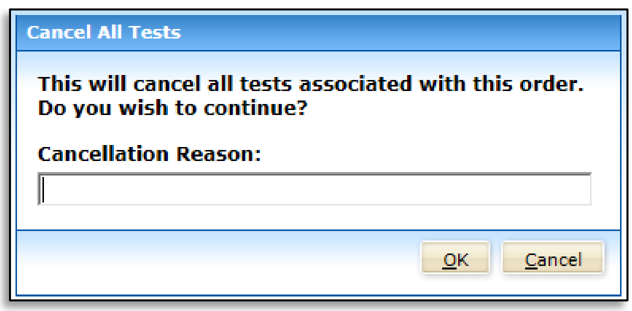
2. On the Batch Processing page, in the Batch column, click the check box next to the order that you want to delete.

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**.

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.

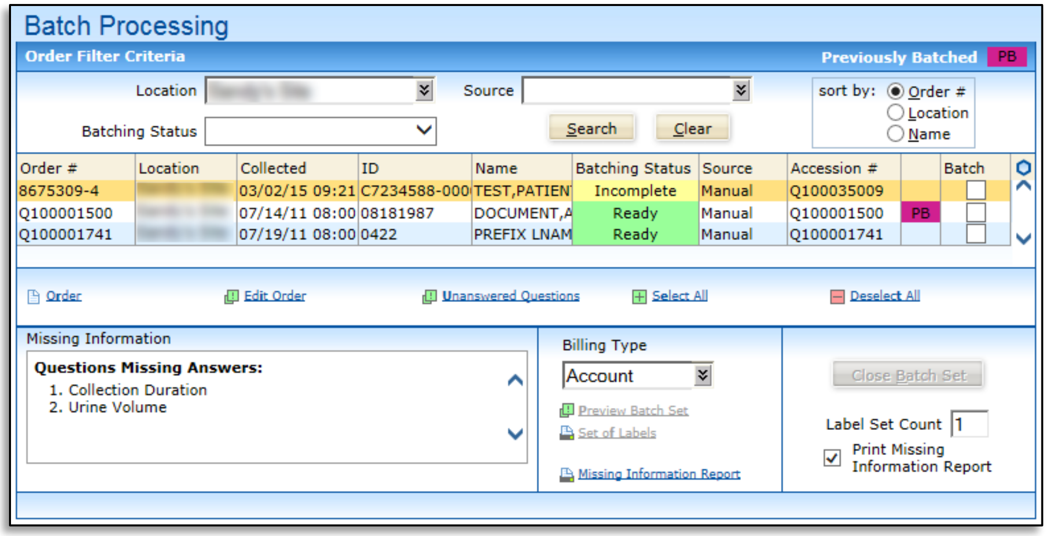
2. On the Batch Processing page, from the **Location** drop-down list, select the location for which you would like to close a batch.

   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.

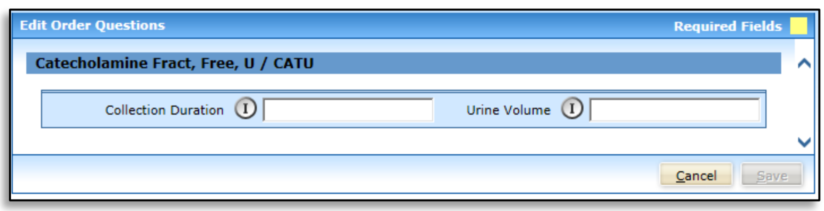
3. To prepare an incomplete order for batching, follow these steps:

   a. Select the order.



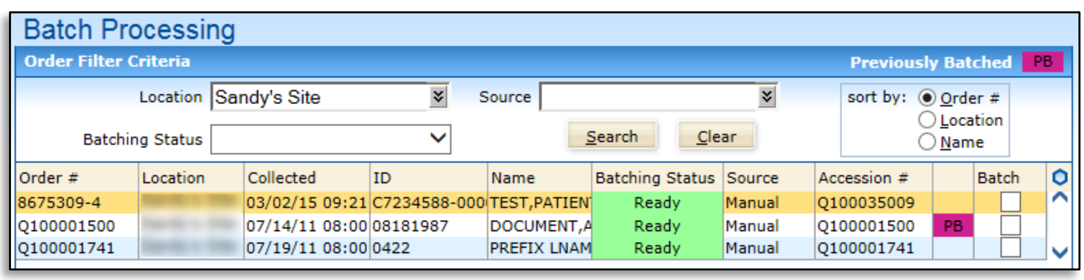
   b. Click the Unanswered Questions link.

   c. Provide the missing information.



   d. Click **Save**.

   The batching status for the order changes to Ready.



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.

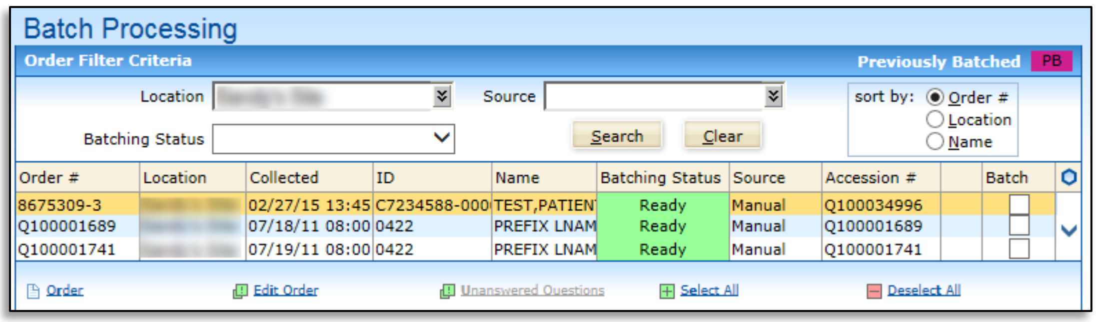
d. Add the missing information or delete the incorrect test code and add the correct one.

e. Save your changes.

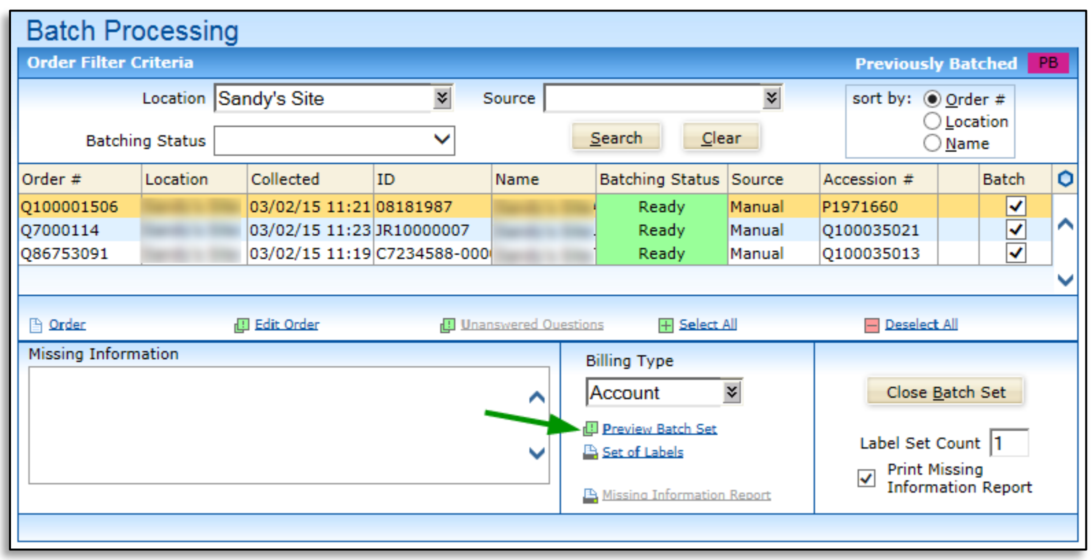
The batching status for the order changes to Ready.

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

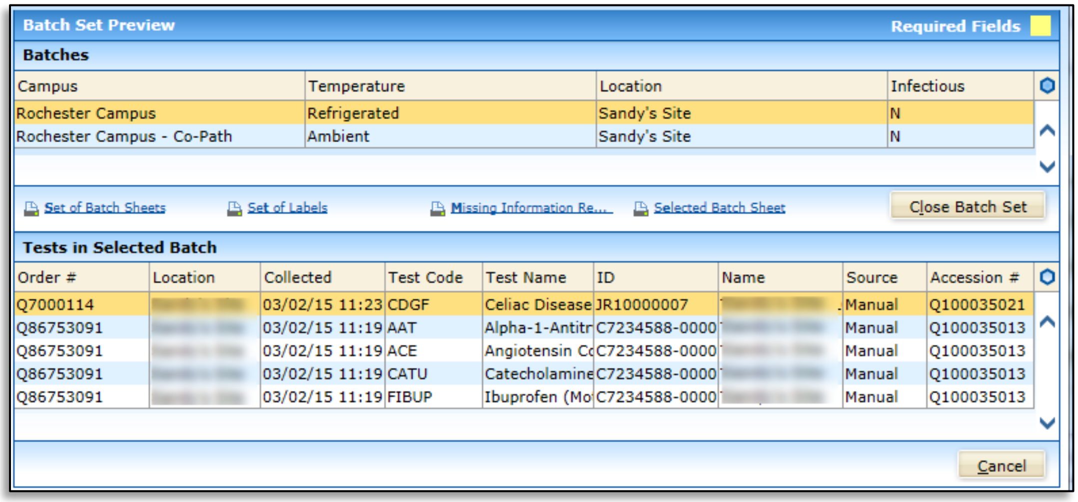
Tip: You can click the **Select All** link to select all the orders. If the **Select All** link is not shown on the Batch Processing page, it is available on the SmartMenu.



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



The Batch Set Preview window is shown.



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

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

   The batch sheets for this batch set are printed automatically.

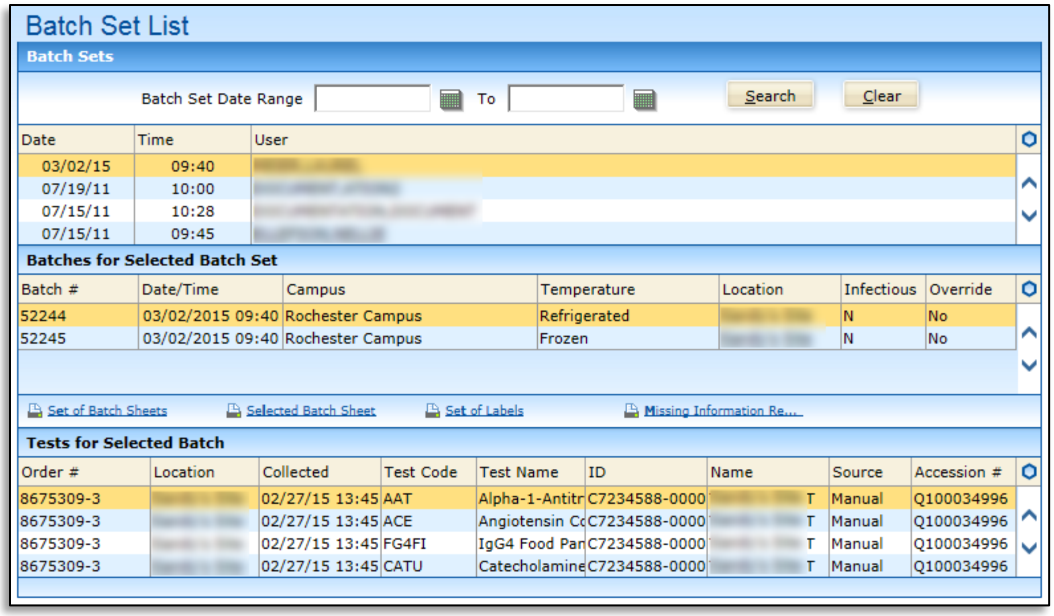
   Note: Closing a batch might also generate a Missing Information Report worksheet. Send the completed worksheet to Mayo Clinic Laboratories so that the information can be added before the specimens arrive.

Printing a Batch Sheet

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

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

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



3. Click **Search**.

   The batch sets for that date range are displayed.

4. Select the batch set that contains the batch sheet that you want to print.

5. 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**.

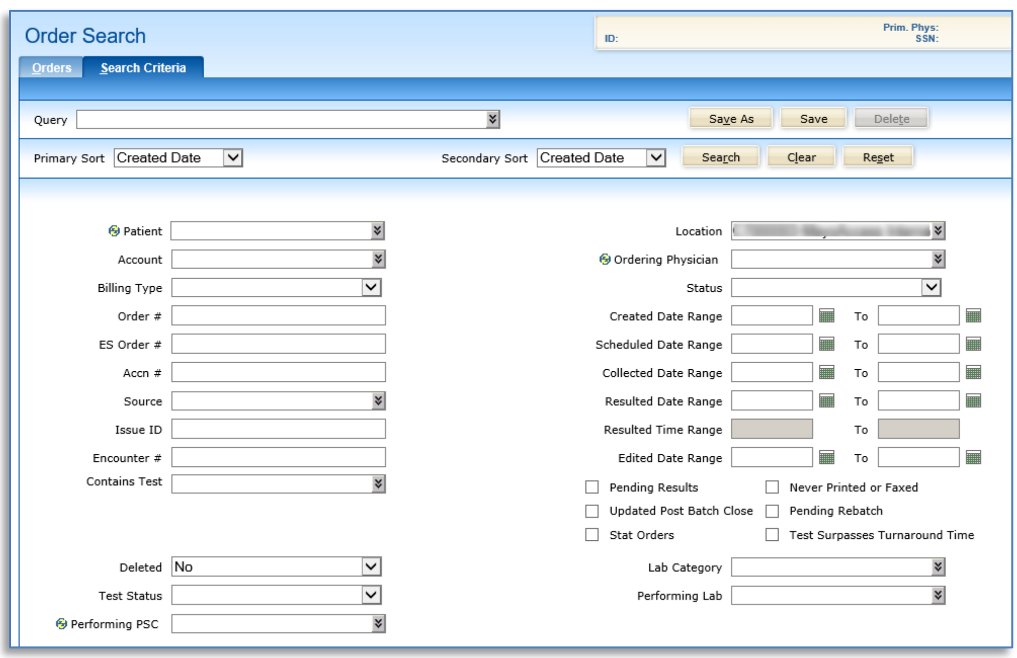
Printing the Batch Sheet for a Specific Order

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

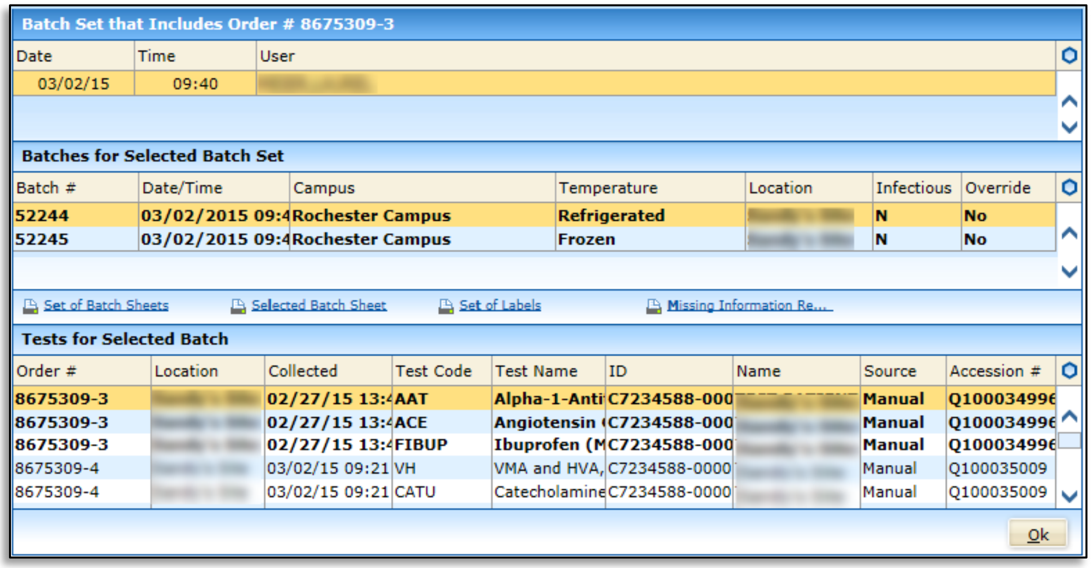


4. Click **Search**.

   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.



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

7. 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.

Printing Specimen Labels

You can configure the MayoACCESS application to automatically print specimen labels when you order a test or when you close a batch. You can also print specimen labels from the Order Search page.

To print specimen labels, follow these steps:

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

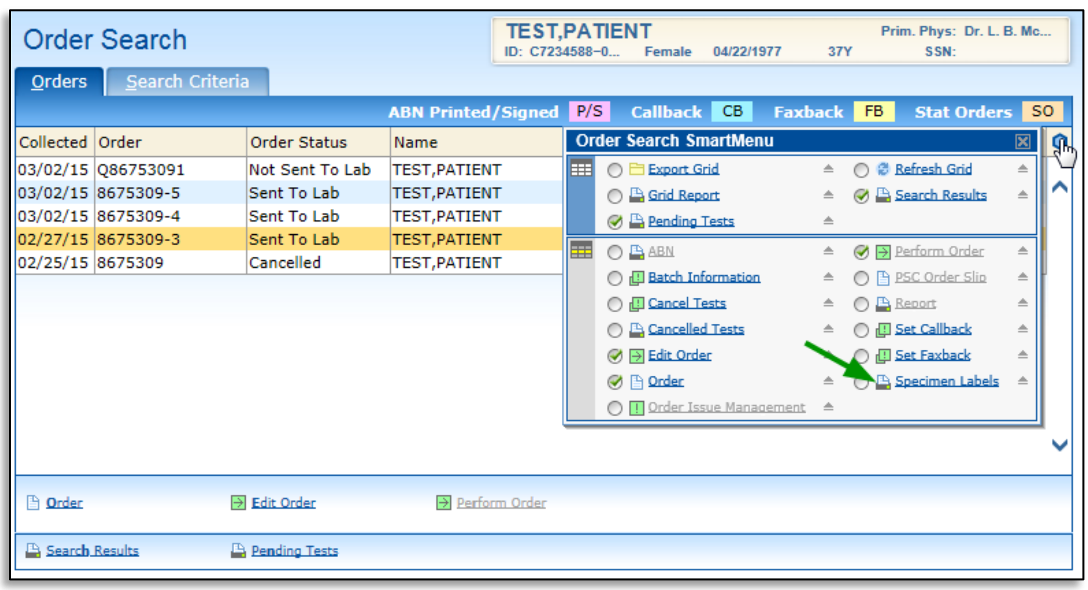
   Tip: Alternatively, you can click **Order Search** in the extended frameset.

2. On the Order Search page, select the order for which you want to print specimen labels.

   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 **Specimen Labels** link.

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



Resetting an LP2824 Plus Printer

To reset an LP2824 Plus printer, follow these steps:

1. In Windows, click **Start**, and then click **Devices and Printers**.

2. Right-click the ZDesigner LP2824 Printer and click **Printer Properties**.
3. Click the **Advanced** tab.
4. Click Printing Defaults.
5. Click the **Tools** tab.
6. In the **Command type** list box, click **Action**.
7. In the **Command name** list box, click **Reset Printer**.
8. Click **Send**.

Switching an LP2824 Plus Printer to Page Mode

To switch the printer to page mode, follow these steps:

1. In Windows, click **Start**, and then click **Devices and Printers**.
2. Right-click the ZDesigner LP2824 Printer and click **Printer Properties**.
3. Click the **Advanced** tab.
4. Click Printing Defaults.
5. Click the **Tools** tab.
6. In the **Command type** list box, click **Action**.
7. In the **Command name** list box, select Switch to Page Mode.
8. Click **Send**.

Switching an LP2824 Plus Printer to Line Mode

To switch the printer to line mode, follow these steps:

1. In Windows, click **Start,** and then click **Devices and Printers**.
2. Right-click the ZDesigner LP2824 Printer and click **Printer Properties**.
3. Click the **Advanced** tab.
4. Click Printing Defaults.
5. Click the **Tools** tab.
6. In the **Command type** list box, click **Action**.
7. In the **Command name** list box, select Switch to Line Mode.
8. Click **Send**.

Handling Specimens

This section contains information about the following tasks:

- Labeling specimens
- Packaging specimens
- Storing specimens

For the most up-to-date information, see the Specimen Handling web page on the Mayo Clinic Laboratories website (Mayocliniclabs.com/specimen/index.html).

Labeling a Specimen

To label a specimen, follow these steps:

1. Hold the bottom of the specimen container in one hand.
2. Remove the label from the backing paper.
3. With the label facing you, position the label vertically as close as possible to the top of the container as shown.

   - **Vials** – Ensure that the letter indicating the specimen temperature is on the bottom of the tube.
   - **Urine bottles** – Ensure that the letter indicating the specimen temperature is on the bottom left corner when the bottle is upright.

4. For frozen specimens, place a small amount of transparent tape around the edge of the label where the temperature is displayed to make sure that the label remains attached to the specimen container.

   Note: To avoid scanning problems, do not tape over the bar code on the label.

Packaging Specimens

Each batch sheet lists the specimens that can be grouped in one package or bag. If a batch has more than one batch sheet, include all specimens for each batch sheet in one package. Do not place more than one batch sheet in a package.

To package specimens, follow these steps:

1. Gather the specimens listed on a batch sheet.
2. Fold the batch sheet in quarters.
3. Place the batch sheet in the outside pocket of the appropriate shipping temperature bag with the address of the performing laboratory and the bar code, which are located in the upper right corner of the batch sheet, facing outward.

   Important: Make sure that the patient information is not visible.
4. Store the packaged specimens in the appropriate storage location.

Storing Specimens

After labeling and packaging specimens, place the package in a storage location that maintains the appropriate temperature for all the specimens in the package. The specimen and batch sheet labels show the required storage temperature as follows:

Temperature Code	Temperature
A	Ambient (room temperature)
F	Frozen
R	Refrigerated
M	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 Laboratory Inquiry at 1-800-533-1710 to learn how to send specimens with miscellaneous temperatures.

Managing Test Results

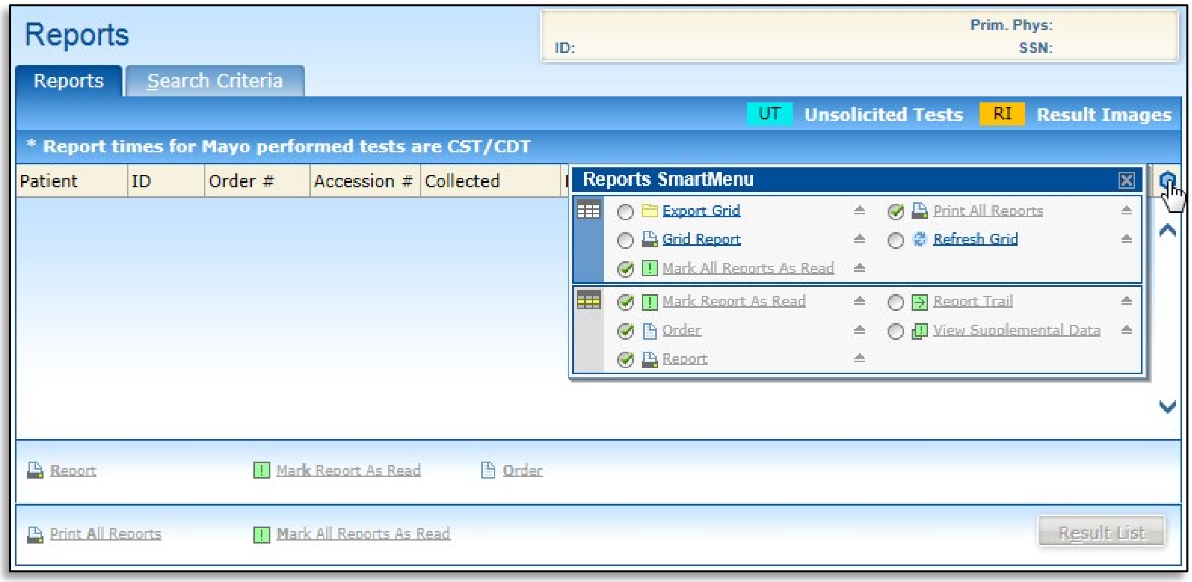
Test results are shown in a laboratory report. This section contains information about the following tasks:

- Searching for a report
- Printing a report
- Printing a Supplemental or Referral PDF report
- Copying and pasting report information from an embedded text file
- Forwarding all test results to your Laboratory Information System (LIS)
- Forwarding individual test results to your LIS

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

Task	**SmartLink**
View or print the selected laboratory report.	Report
Change the status of the selected report from Read to Unread or from Unread to Read.	Mark Report As Read Mark Report As Unread
View or print information about the order associated with the selected report.	Order
Print all the reports shown on this page.	Print All Reports
Change the status of all the reports shown on this page from Read to Unread or from Unread to Read.	Mark All Reports As Read Mark All Reports As Unread
View the test results for the selected report. This option displays the test results on a page that provides additional options, such as viewing and printing reports and result details.	Result List
Display the report trail for the selected report.	Report Trail

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



Searching for a Report

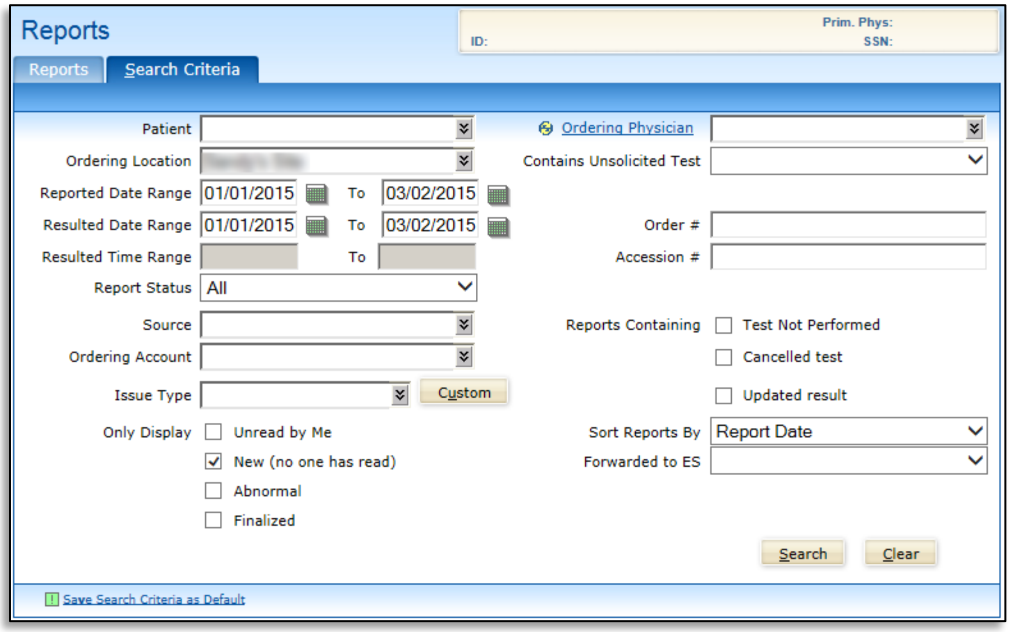
The default Reports page shows only unread reports. This default enables you to easily select, view, and print these reports.

To locate both read and unread reports, follow these steps:

1. On the **Results** menu, click **Reports**.

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

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



3. On the Search Criteria page, specify any of the following criteria to locate the report that you want to view or print:

   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.
Ordering Location	The location from which the order was placed
Reported Date Range	The range of dates during which the report became available **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 is a single day, the time range during which the test results became available
Report Status	The status for the report

Search Criteria	Description
Source	Whether the order is integrated or manual An integrated order originates from a Laboratory Information System (LIS). A manual order originates from within the MayoACCESS application.
Ordering Account	The account that was used to place the order
Issue Type	The InfoLink issue type that is associated with the order
Only Display	The status of the reports that you want to display You can search for reports that you have not read, new reports that no one has read, abnormal reports, or finalized reports.
Ordering Physician	The physician who ordered the test
Contains Unsolicited Tests	Whether the report contains tests that were not on the original order
Order #	The accession number for your LIS. You must specify the complete number.
Accession #	The accession number that the MayoACCESS application assigned to the order
Reports Containing	Whether you want to search for reports that contain a test not performed, a cancelled test, or an updated result
Sort Reports By	Whether you want the reports sorted by patient, by report date, or by result date
Forwarded To ES	Whether you want to search for reports that have been forwarded to your LIS

Tip: To save your search criteria selections for future use, click the **Save Search Criteria as Default** link.

4. Click **Search.**

The laboratory reports that match the specified criteria are shown**.**

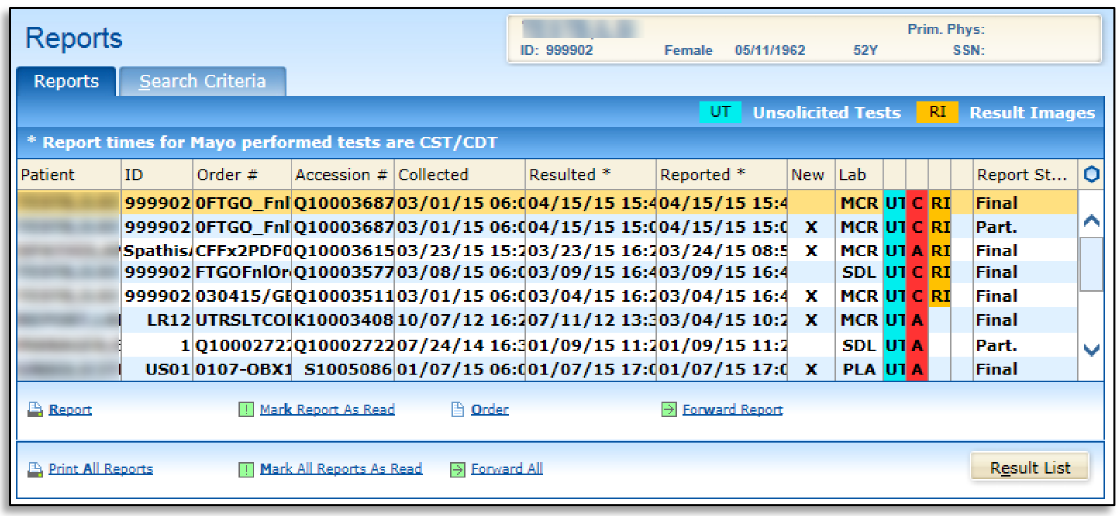
Printing a Report

To print a report, follow these steps:

1. On the **Results** menu, click **Reports**.

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

   Reports that match the default search criteria are shown.



   The report might contain the information as shown in the following table:

Icon	Description
UT	The report contains results for unsolicited tests.
C	The report contains critical results.
A	The report contains abnormal results.
RI	The report contains a supplemental PDF or supplemental data.

2. On the Reports page, locate the report that you want to print.

   For instructions, see Searching for a Report on page 78.

3. Select the report that you want to print.

4. Click the **Report** link.

   Tips:

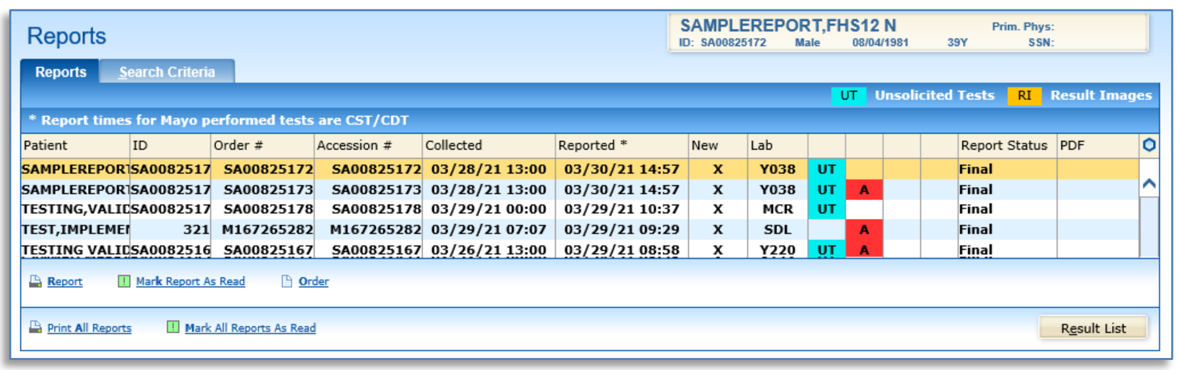
   - Click the arrow next to the Report link to select either **View Report** or **Print Report**.
   - You can click the **Print All Reports** link to print all the reports shown on the Reports page.

Printing a Supplemental or Referral PDF Report

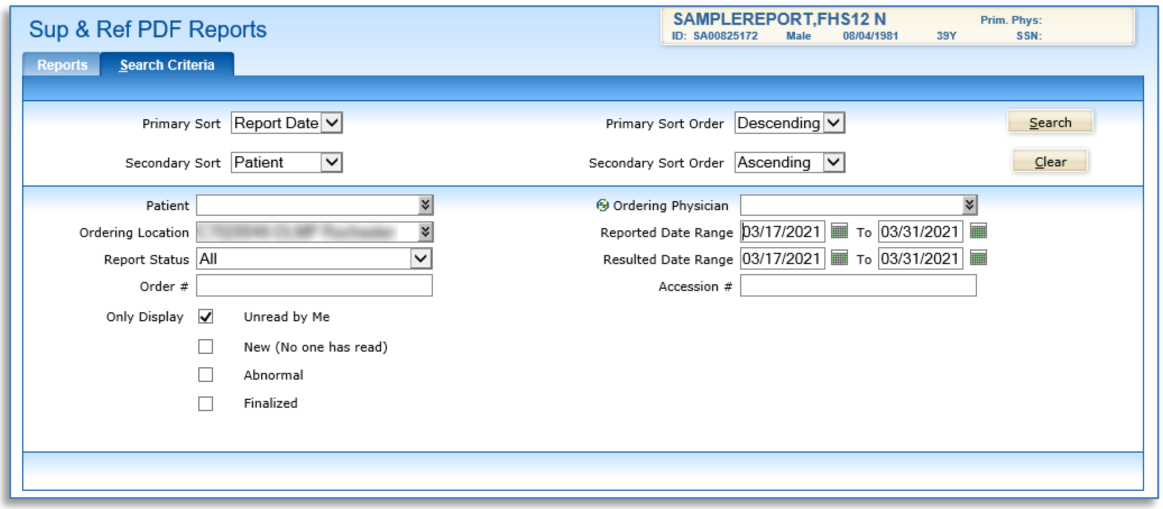
To locate only supplemental or PDF reports, log in to the MayoACCESS application and follow these steps:

1. On the **Results** menu, click **Sup & Ref PDF Reports**.

The Reports page is displayed. This page displays only supplemental and referral PDF reports that you have not viewed.



2. To search for other reports, click the **Search Criteria** tab.

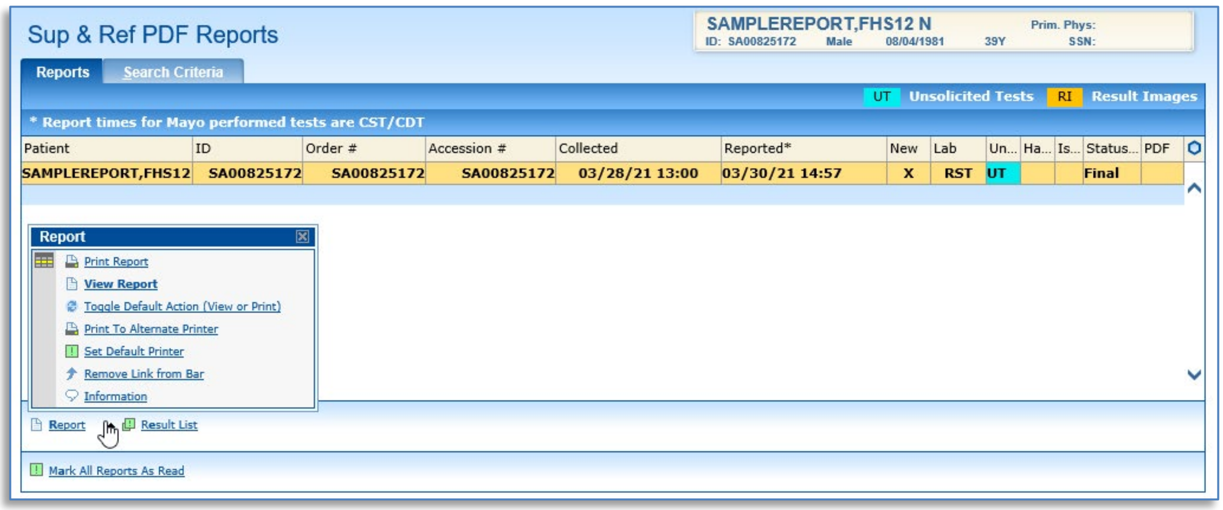


3. On the Search Criteria page, specify any of the following criteria to locate the report that you want to view or print.

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.
Ordering Location	The location from which the order was placed
Report Status	The status for the report
Accession #	The accession number that the MayoACCESS application assigned to the order
Ordering Physician	The physician who ordered the test
Reported Date Range	The range of dates during which the report became available **Tip:** Use the calendar icons to specify the dates.
Order #	The accession number for your LIS. You must specify the complete number.
Only Display	The status of the reports that you want to display

Search Criteria	Description
	You can search for reports that you have not read, new reports that no one has read, abnormal reports, or finalized reports.

4. Click **Search**.
   The supplemental and referral reports that match the specified search criteria are shown.
5. Select the report that you want to view or print.
   Note: The selected report will be highlighted yellow.
6. Click the **Report** link.



Tips:

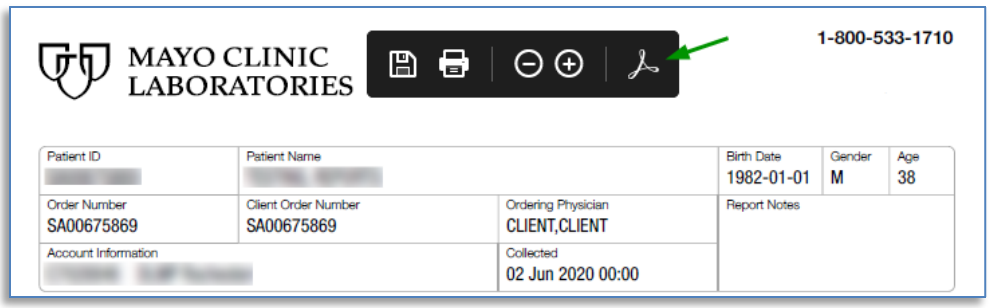
- Click the arrow next to the Report link to select either **View Report** or **Print Report**.
- You can click the **Print All Reports** link to print all the reports shown on the Reports page.

Copying and Pasting Report Information from an Embedded Text File

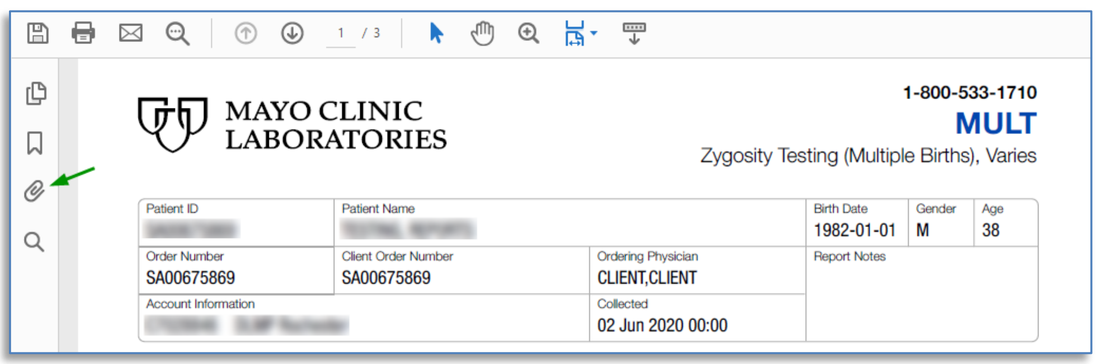
After opening your report, you can copy information from the report to paste into another application or system.

To copy and paste the information from a report that you are viewing, follow these steps:

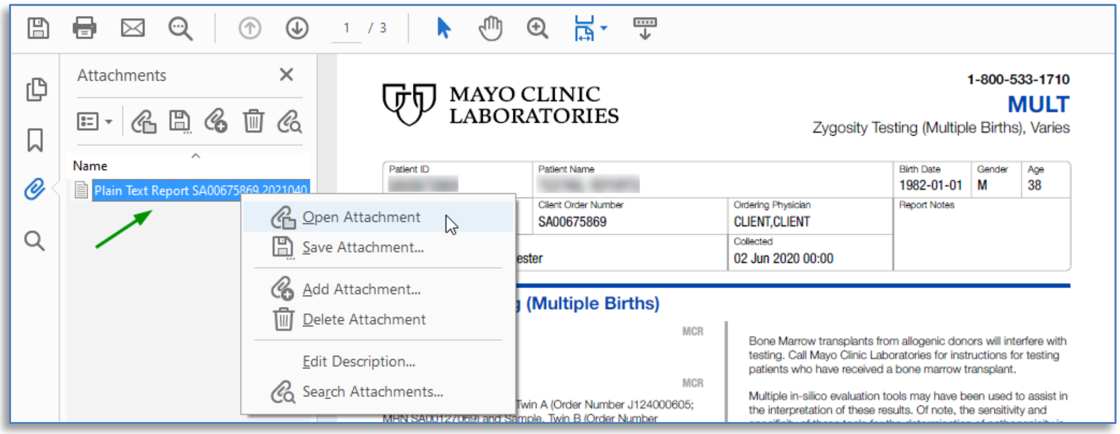
1. On the Adobe toolbar, click the Adobe icon.



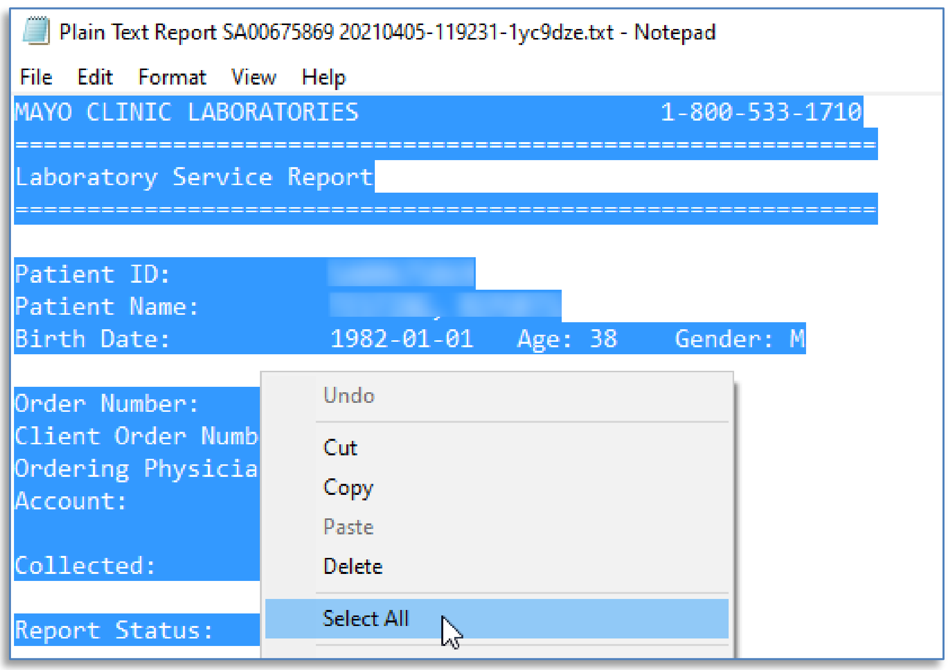
2. Click the attachments icon.



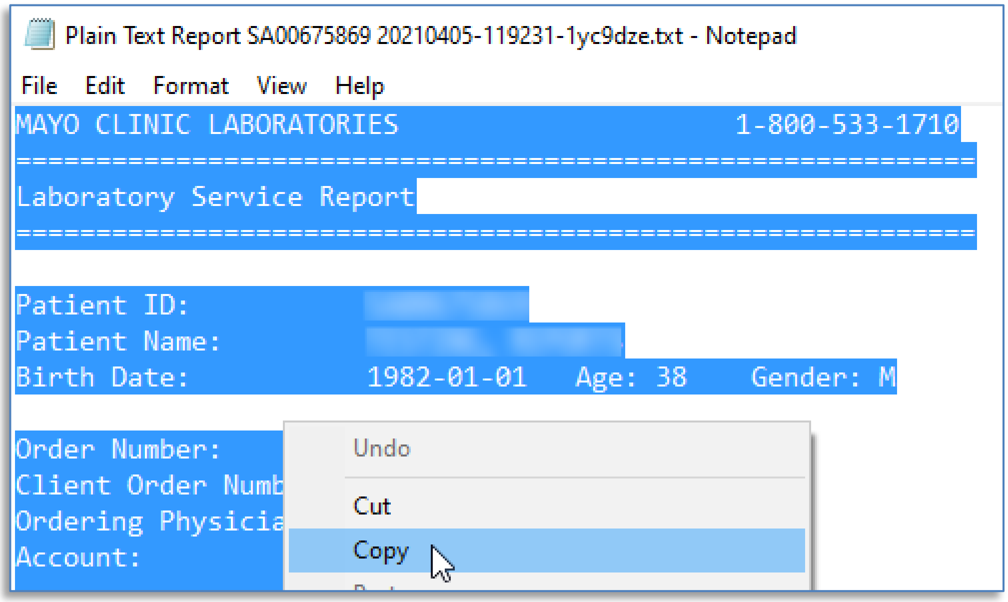
3. Right-click the Plain Text Report file and select **Open Attachment**. The file opens in the application assigned to open text files on your computer. For example, the file might open in Notepad.



4. To select a portion of text, right-click and choose **Select All**, or manually select the text that you want to copy.

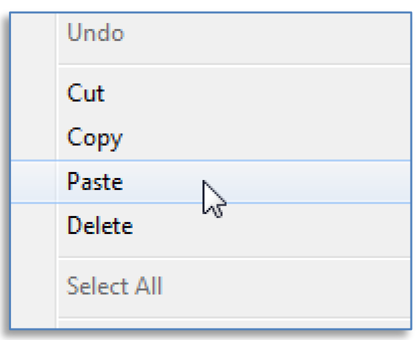


5. Right-click and select **Copy**.



6. Right-click and select **Paste** to paste the copied data into your application or system.

   Note: You might need to change the format of the text so that it displays properly after you paste it into your application or system. For example, you can set the font to Courier New.



Forwarding All Results to Your Laboratory Information System

You can forward test results from the MayoACCESS application to your Laboratory Information System (LIS). In the MayoACCESS application, your LIS is known as an *electronic system (ES)*. You can forward both results that have not been forwarded and results that were previously forwarded to your LIS.

To forward all test results to your LIS, follow these steps:

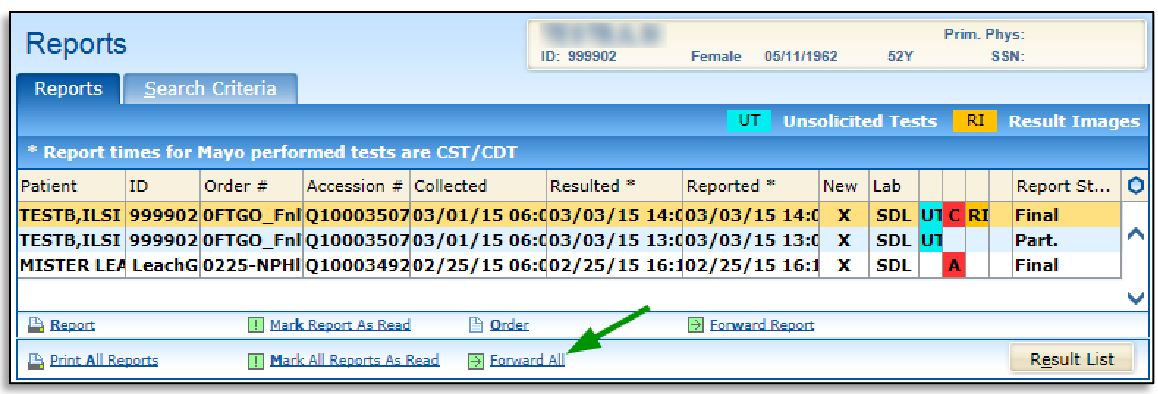
1. On the **Results** menu, click **Reports**.

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

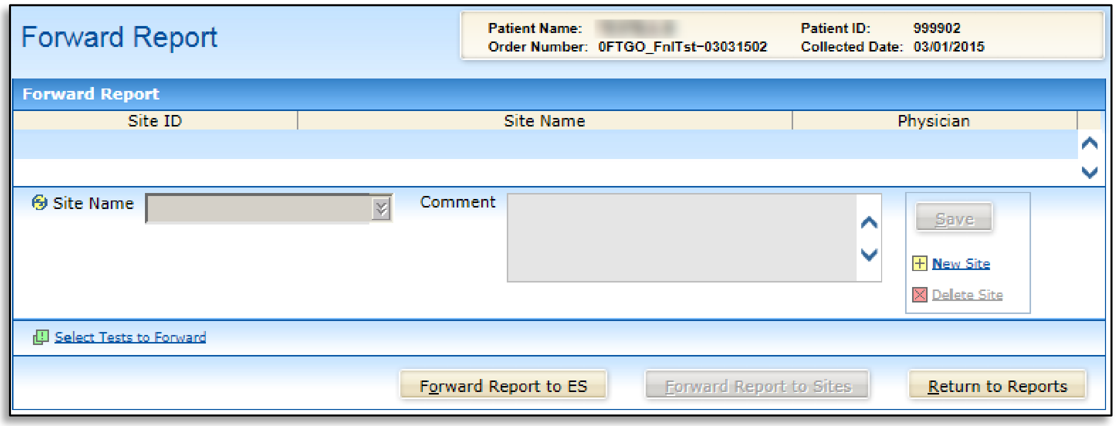
2. On the Reports page, click the **Search Criteria** tab.
3. On the Search Criteria page, specify search criteria to locate the reports that you want to forward.

   For instructions, see Searching for a Report on page 78.
4. Click **Search**.

   The laboratory reports that match the search criteria are shown.
5. Click the **Forward All** link.



6. On the Forward Report page, click **Forward Reports to ES**.



The results are queued to be forwarded to your LIS, and a message is shown.

7. Click **OK**.

   The results are forwarded to your LIS. If the results were previously forwarded, the following message is shown:

   `There are no results to be forwarded for this report that match your search criteria:`

   Note: There might be instances where your LIS cannot receive the forwarded results. For example, if a test is not built in the LIS or if the order is not present in the LIS, the LIS cannot receive the forwarded results.

To forward results that were previously forwarded, follow the steps in Forwarding Individual Test Results to Your Laboratory Information System on page 89.

Forwarding Individual Test Results to Your Laboratory Information System

You can forward results for an individual test from the MayoACCESS application to your Laboratory Information System (LIS). In the MayoACCESS application, your LIS is known as an *electronic system (ES)*. You can forward both results that have not been forwarded and results that were previously forwarded to your LIS.

To forward individual test results to your LIS, follow these steps:

1. On the **Results** menu, click **Reports**.

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

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

3. On the Search Criteria page, specify search criteria to locate the reports that you want to forward.

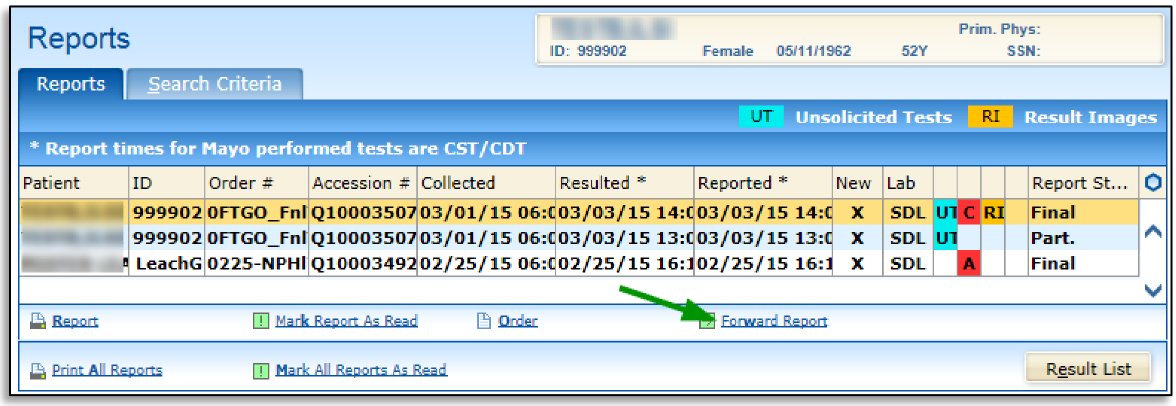
   For instructions, see Searching for a Report on page 78.

4. Click **Search**.

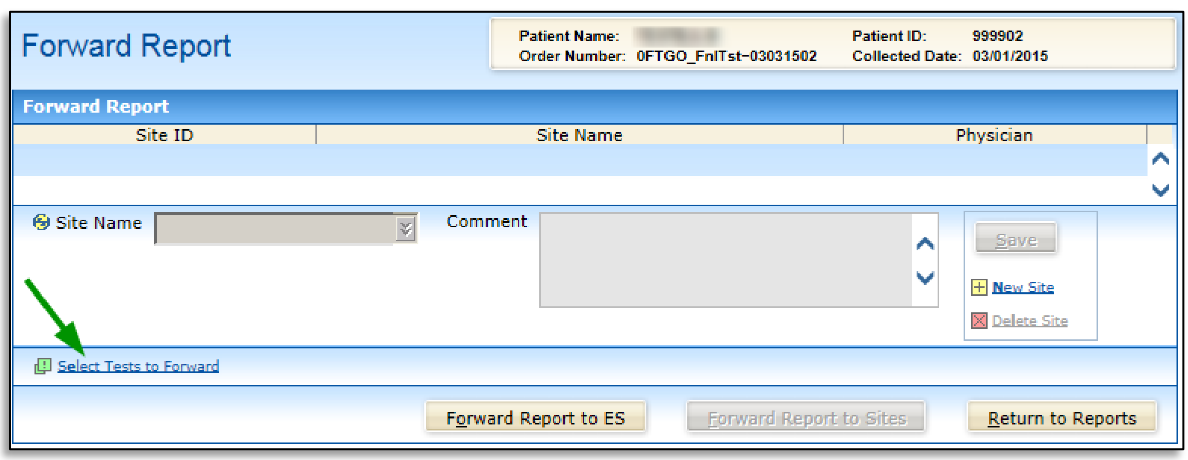
   The laboratory reports that match the search criteria are shown.

5. Select the laboratory report that you want to forward to your LIS.

6. Click the **Forward Report** link.

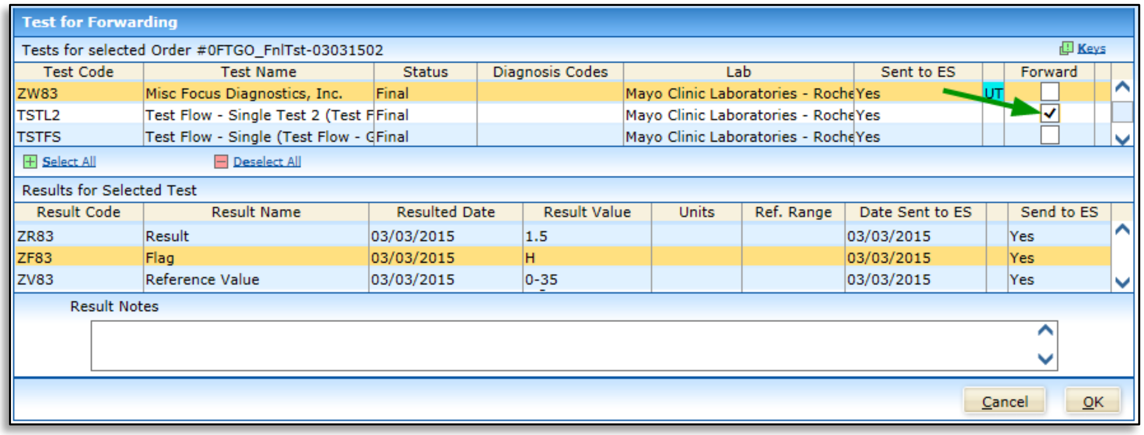


7. On the Forward Report page, click the **Select Tests to Forward** link.



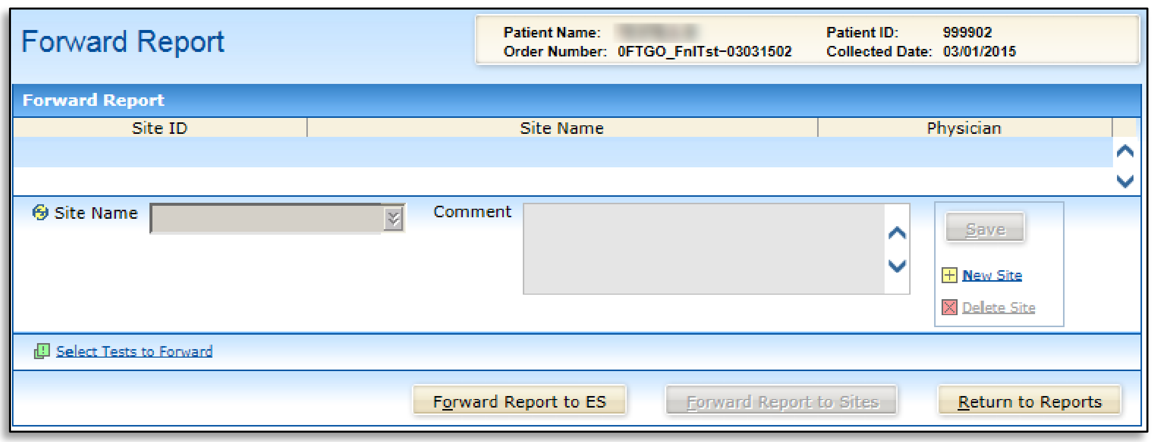
8. In the Test for Forwarding dialog box, in the Forward column, select the check box next to the test results that you want to forward.

   Tip: You can click the **Select All** link if you want to forward all the test results.



9. Click **OK**.

10. On the Forward Report page, click **Forward Report to ES**.



The results are queued to be forwarded to your LIS and a message is shown.

11. Click **OK**.

The results are forwarded to your LIS.

Note: There might be instances where your LIS cannot receive the forwarded results. For example, if a test is not built in the LIS or if the order is not present in the LIS, the LIS cannot receive the forwarded results.

Printing Reports

You can view and print the following reports:

- Orders Pending Results

  This report shows all orders for a specific patient that are missing test results.

- Pending Test

  This report shows the status of tests that have not been completed for a selected order.

- Unsolicited Test

  This report shows the results of a test that was added by the performing laboratory and is not on the original test order. An unsolicited test report is typically the result of the performing laboratory adding a reflex test to an order.

- Test Not Performed (TNP)

  This report shows the tests that have been cancelled with a result of test not performed (TNP).

- Test Utilization

  This report shows the type and number of tests that have been ordered for a site or for a location.

Printing an Orders Pending Results Report

This report shows all orders for a specific patient that are missing test results. This report is useful for identifying orders that are still pending without searching for those orders individually.

To print the Order Pending report, follow these steps:

1. On the **Patients** menu, click **Patient Search**.

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

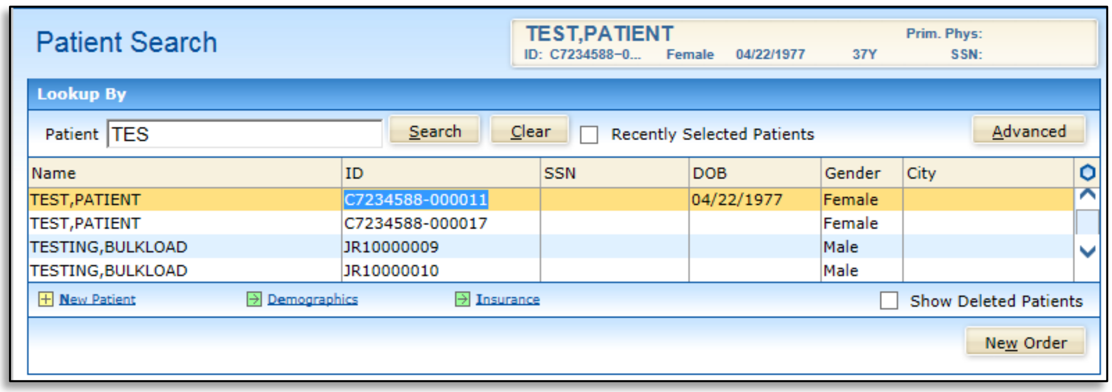
   

2. On the Patient Search page, in the **Patient** text box, enter either the ID number or the first few characters of the patient's last name.
3. Click **Search.**

   The patient records that match the ID number or characters that you entered are shown**.**

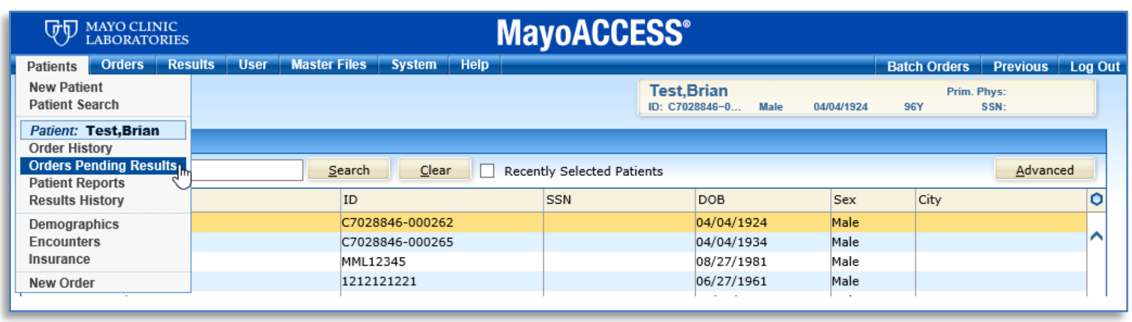
Tips:

- If you are unsure of the ID number or the spelling of the patient's last name, enter just the letters or numbers that you know. The search results contain all the patient records that match the numbers or letters that you specify. For example, if you enter DO in the **Patient** text box, and then click **Search,** all patients with last names or records that contain DO are shown.
- You can also select the **Recently Selected Patients** check box to display patient records that were recently opened.

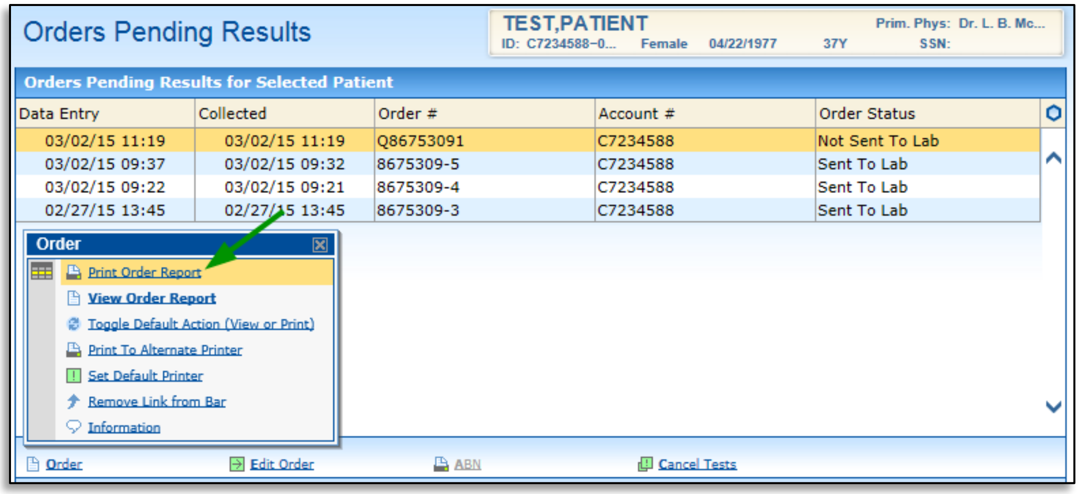


4. Select the patient whose orders you want to view.
5. On the **Patients** menu, click **Orders Pending Results.**

   Tip: Alternatively, you can click **Orders Pending Results** in the extended frameset.



6. To print the order report for the selected patient, click the **Print Order Report** link on the Orders Pending Results page.



Printing the Pending Test Report

This report shows the status of tests that have not been completed for a selected order.

To print the Pending Test report, follow these steps:

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

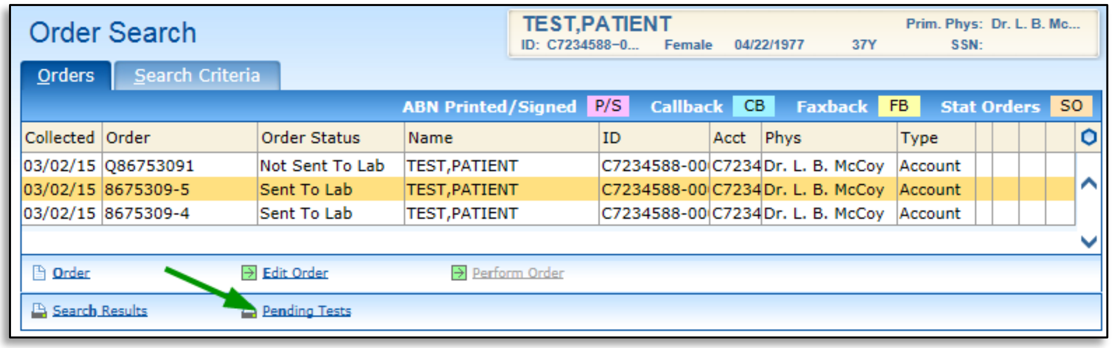
   Tip: Alternatively, you can click **Order Search** in the extended frameset.

2. On the Order Search page, select the order for which you want to print the Pending Test report.

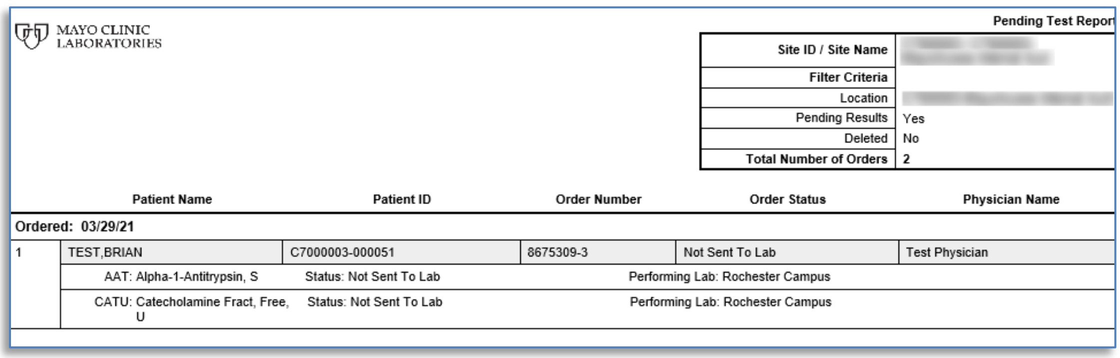
   Tip: Click the **Search Criteria** tab and use that page to locate the order. For instructions, see Searching for an Order on page 47.

3. To print the Pending Test report, click the **Pending Tests** link.

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



The Pending Test report is arranged by order date and patient name.



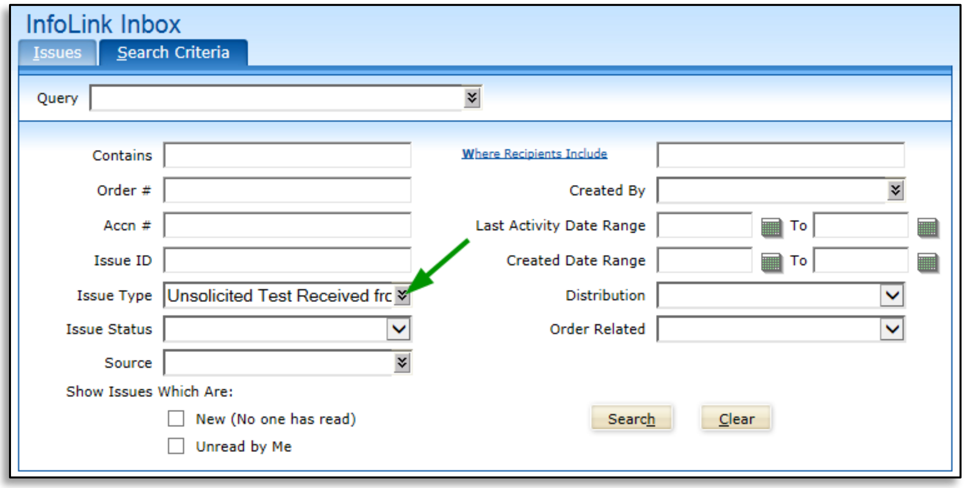
Printing the Unsolicited Test Report

An unsolicited test is a test that was added by the performing laboratory and is not on the original test order. You can view the results of an unsolicited test and manually forward the results to your Laboratory Interface System (LIS).

To print an unsolicited test report, follow these steps:

1. On the **User** menu, click **InfoLink Inbox**.

2. On the InfoLink Inbox page, click the **Search Criteria** tab.
3. From the **Issue Type** drop-down list, select Unsolicited Test Received from Performing Lab.

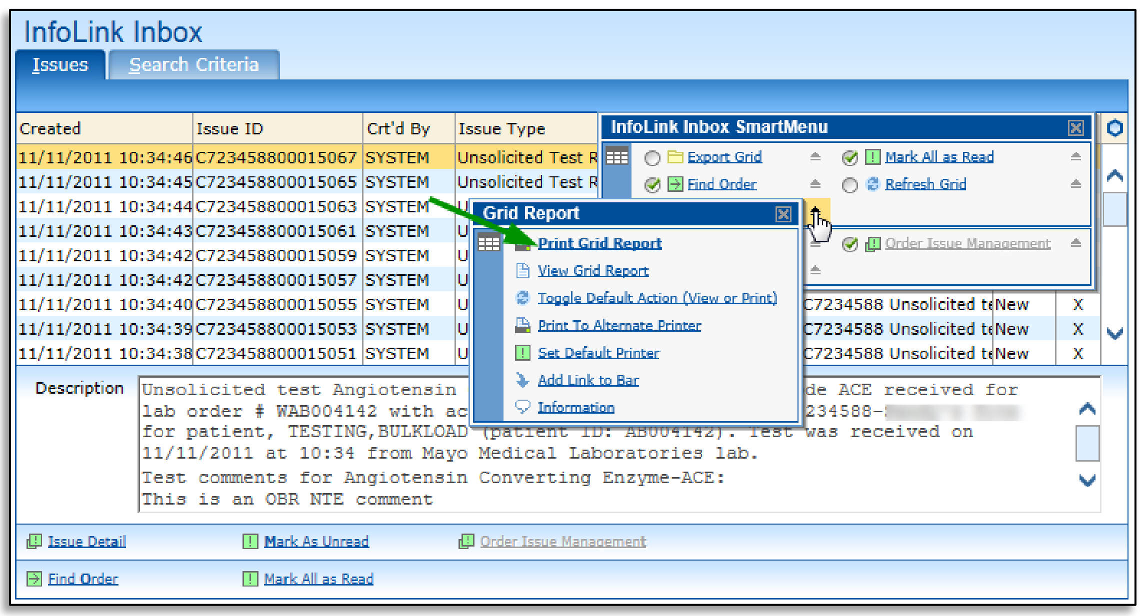


4. Click **Search**.

   All the orders with that issue type are shown on the Issues page.

5. To print the unsolicited test report, click the **Grid Report** link.

   Tip: If the **Grid Report** link is not shown on the InfoLink Inbox page, it is available on the SmartMenu.

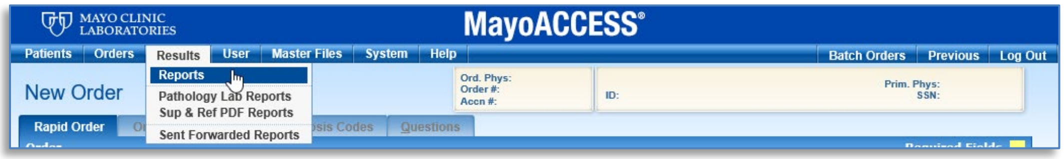


Printing the Test Not Performed Report

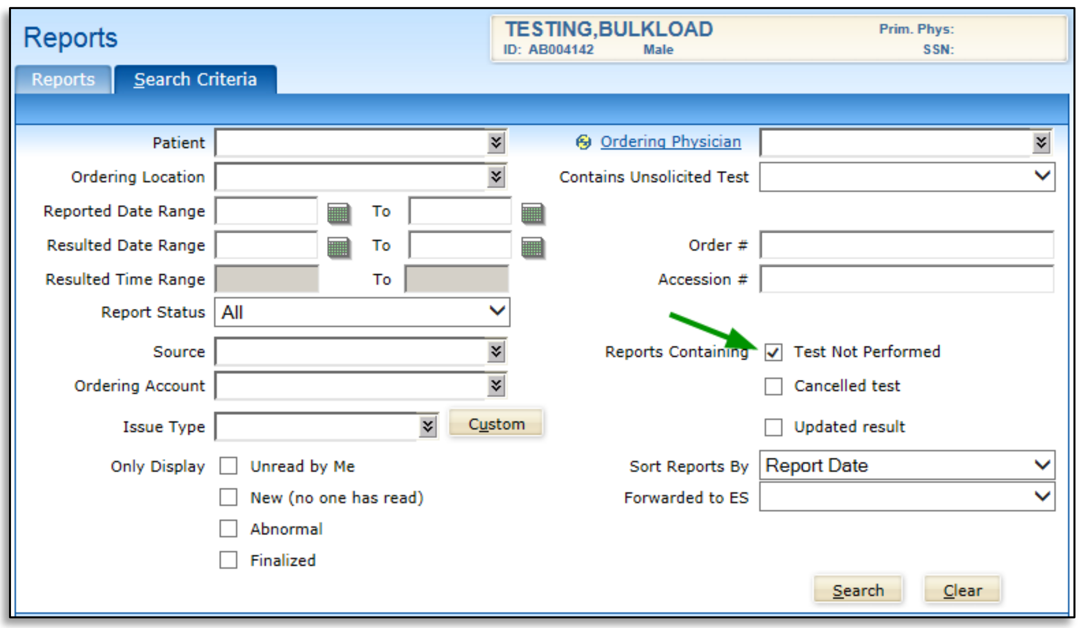
The test not performed (TNP) report contains a list of tests that have been cancelled with a result of TNP from the performing laboratory. To print a TNP report, follow these steps:

1. On the **Results** menu, click **Reports.**

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



2. On the Reports page, click the **Search Criteria** tab.
3. On the Search Criteria page, click the **Test Not Performed** check box.

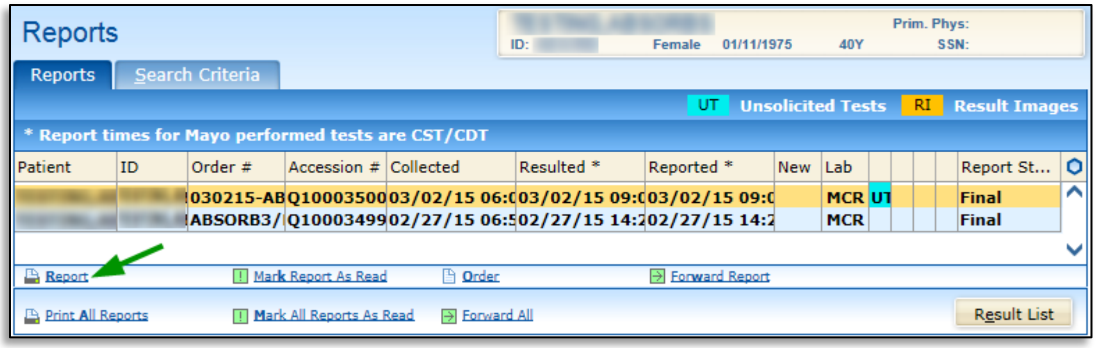


4. Clear the **New (no one has read)** check box.
5. Click **Search**.

   The TNP reports are shown on the Reports page.

6. To print a TNP report, click the **Report** link.

   Tip: If the **Report** link is not shown on the Reports page, it is available on the SmartMenu.

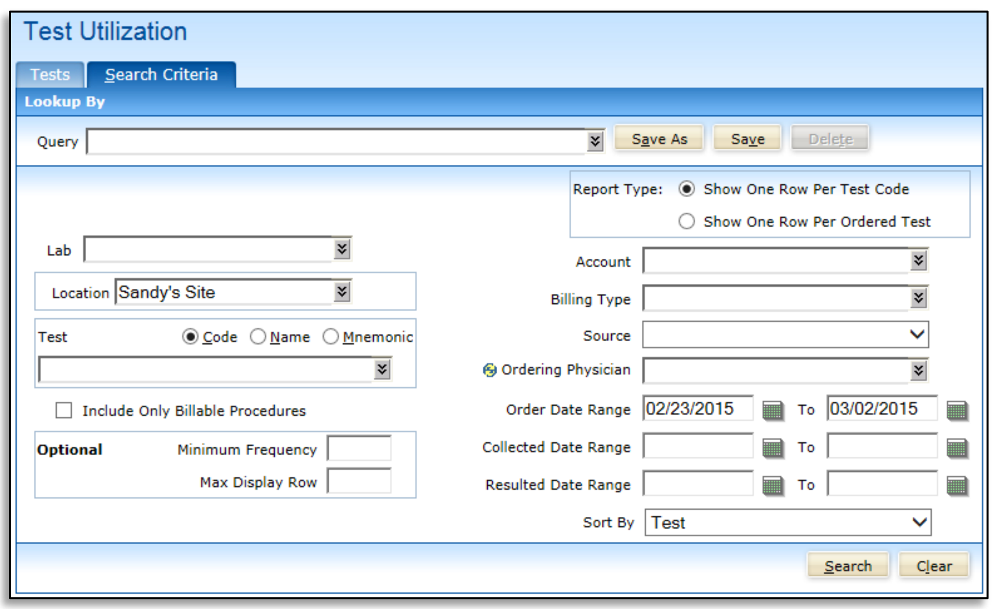


Printing a Utilization Report

A Utilization Report shows the type and number of tests that have been ordered for a site or for a location. To print a Utilization Report, follow these steps:

1. On the **Orders** menu, click **Test Utilization**.

2. On the Test Utilization page, click the **Search Criteria** tab.



3. On the Search Criteria page, specify any of the following criteria for the test utilization information that you want to print.

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

Search Criteria	**Description**
Lab	The laboratory that performed the tests
Location	The location from which the tests were ordered
Keyword	The test for which you want to display utilization
Include Only Billable Procedures	Whether to search only for tests that were billable
Minimum Frequency	The threshold value for the number of times that a test was ordered. For example, enter **5** to display only those tests that were ordered 5 or more times.
Max Display Row	The total number of rows that you want to display in the results list
Report Type	Whether you want to show one row for each test code or one row for each ordered test
Account	The account that was used to order the test
Billing Type	The billing type that was specified when the test was ordered
Source	Whether the test was ordered from a Laboratory Information System (LIS) (integrated), from within the MayoACCESS application (manual), or was unsolicited (usually a reflex test)
Ordering Physician	The physician who ordered the test
Order Date Range	The range of dates during which the test was ordered **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.

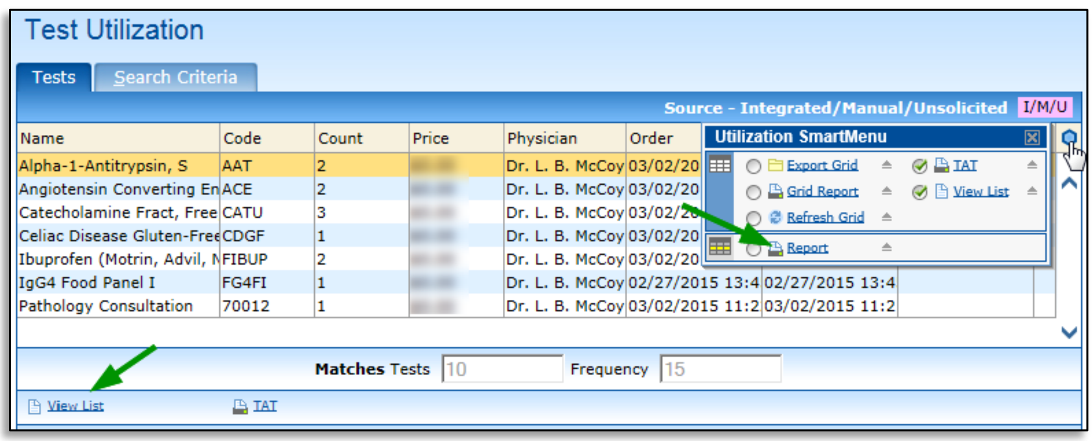
Search Criteria	Description
Resulted Date Range	The range of dates during which the test results became available **Tip:** Use the calendar icons to specify the dates.
Sort By	How the search results are displayed. For example, select **Frequency** to display the list of tests ordered starting with the most-ordered tests to the least-ordered tests.

Tip: To save your search criteria selections for future use, click **Save as**, and then enter a name for the query and click **OK**.

4. Click **Search**.

   The tests that match the specified search criteria are shown.

5. To view the report, click the **View List** link.



6. To print the report, click the **Report** link.

   Tips:

   - You can also use the **Export Grid** link to create a Microsoft Excel spreadsheet file that contains the test utilization search results.
   - If these links are not shown on the Test Utilization page, they are available on the SmartMenu.

Administering the MayoACCESS Application

As a MayoACCESS administrator, you can perform the following tasks:

- Manage physician records
- Manage patient records
- Administer MayoACCESS users
- Customize the MayoACCESS application

The following topics provide information about each of these tasks.

Managing Physician Records

As a MayoACCESS administrator, you can perform the following tasks:

- Create physician records
- Change physician information
- Delete or inactivate physician records
- Merge and unmerge physician records

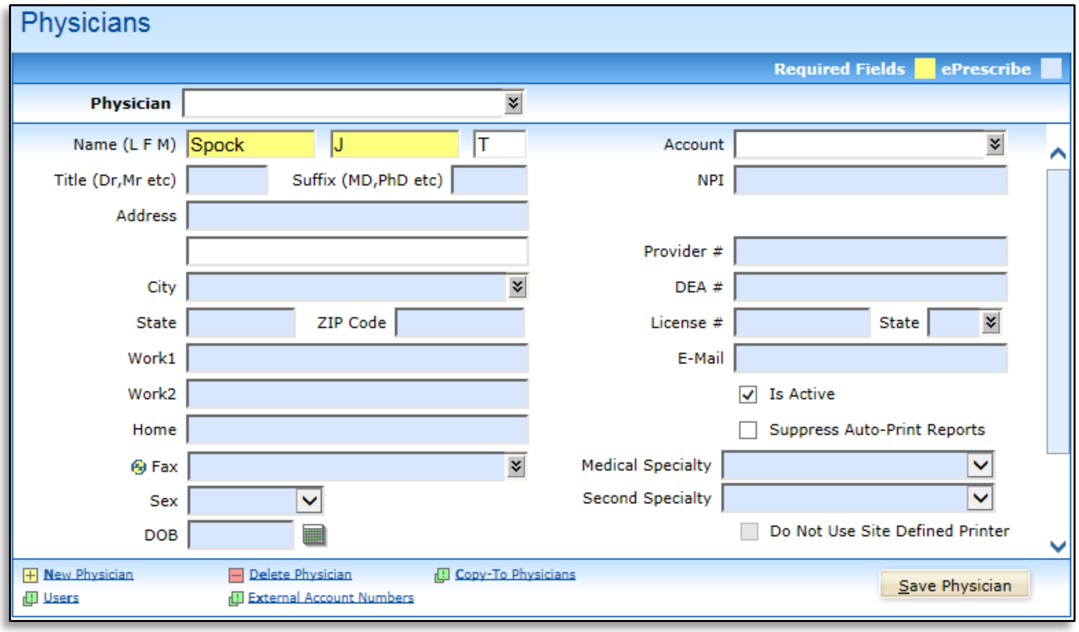
The following topics provide information about each of these tasks.

Creating a Physician Record

To create a physician record, follow these steps:

1. On the **Master Files** menu, click **Physicians**.

2. On the Physicians page, specify the information for the physician.



3. If applicable, select a specialty from the **Medical Specialty** and **Second Specialty** drop-down lists.

4. Click **Save Physician** to create the physician record.

Changing Physician Information

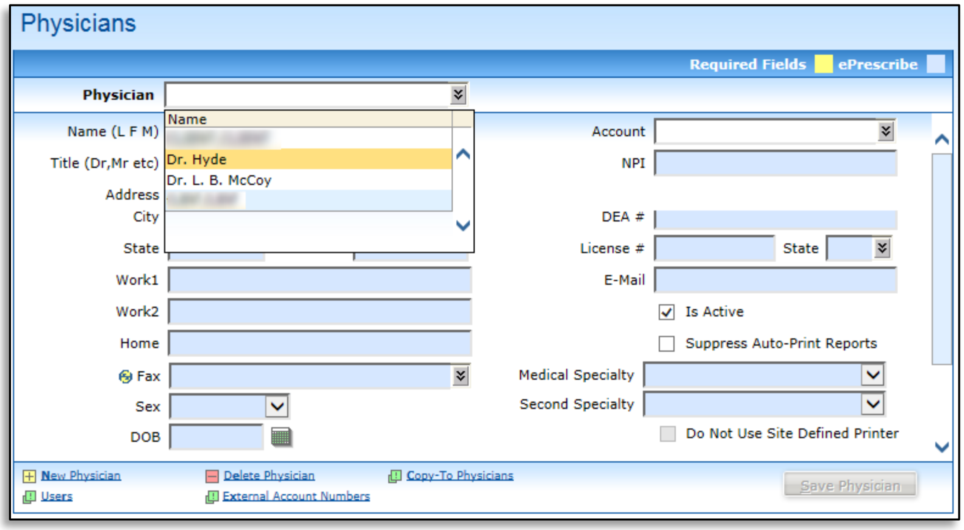
To change the information for a physician, follow these steps:

Note: You must belong to the Client Supervisor security group to perform this task.

1. On the **Master Files** menu, click **Physicians**.

2. On the Physicians page, select a physician name from the **Physician** drop-down list.

3. Add or change information about the physician, and then click **Save Physician**.



Deleting a Physician Record

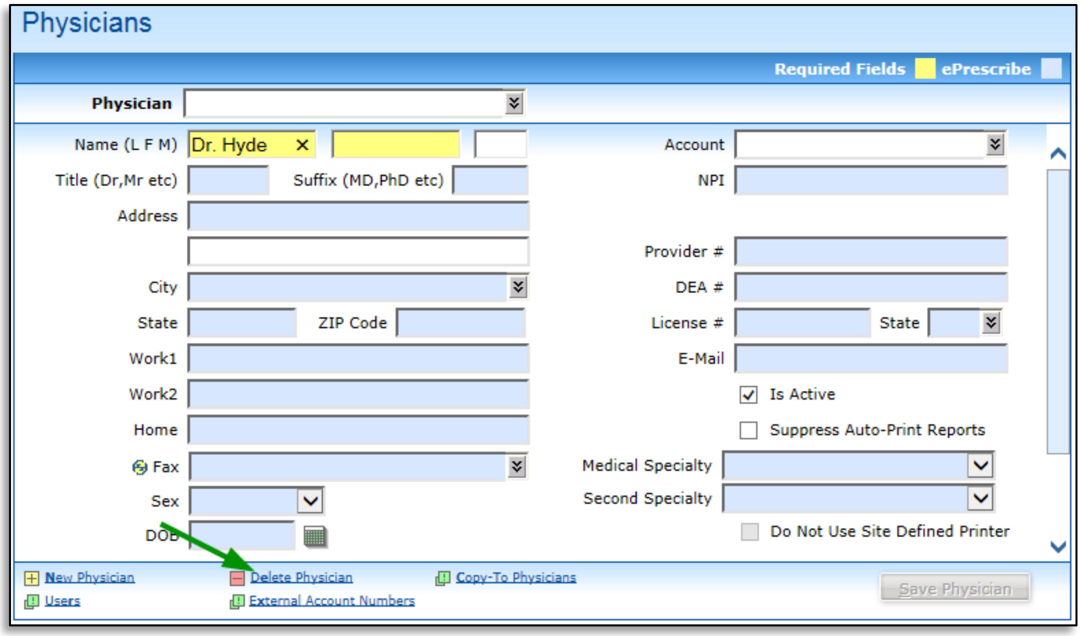
To delete a physician record, follow these steps:

Note: You must belong to the Client Supervisor security group to perform this task.

1. On the **Master Files** menu, click **Physicians**.

2. On the Physicians page, select a physician name from the **Physician** drop-down list.

3. Review the information to confirm that you selected the physician record that you want to delete, and then click **Delete Physician**.



Note: Physicians that are associated with test orders cannot be deleted. Instead you must inactivate the physician record by clearing the **Is Active** check box.

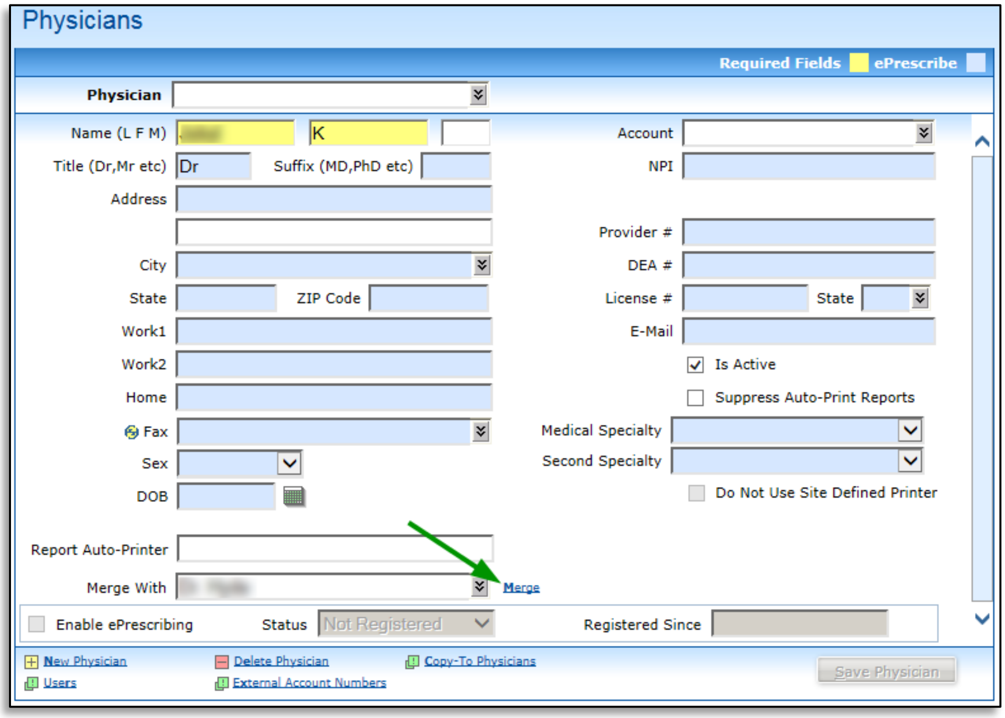
Merging Physician Records

To merge different physician records into a single record for the same physician, follow these steps:

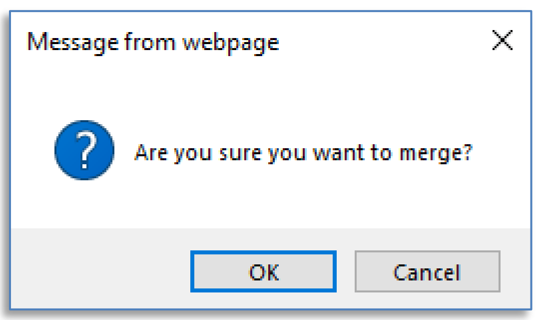
1. On the **Master Files** menu, click **Physicians**.

2. On the Physicians page, select a physician name from the **Physician** drop-down list.
3. Select the correct record for the physician from the **Merge With** drop-down list.

4. Click the **Merge** link.



5. When prompted, click **OK** to confirm that you want to merge these records.



Note: After the records are merged, the **Merge** link changes to **Unmerge**. If you need to reverse the merge, click the **Unmerge** link.

Managing Patient Records

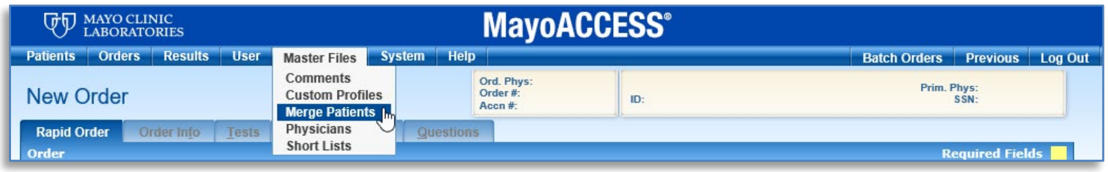
As a MayoACCESS administrator, you can merge patient records for the same patient. The original records are retained, so if necessary, you can later unmerge patient records that have been merged.

Merging Patient Records

To merge patient records into a single record for the same patient, follow these steps:

Note: You must belong to the Client Supervisor security group to perform this task.

1. On the **Master Files** menu, click **Merge Patients**.

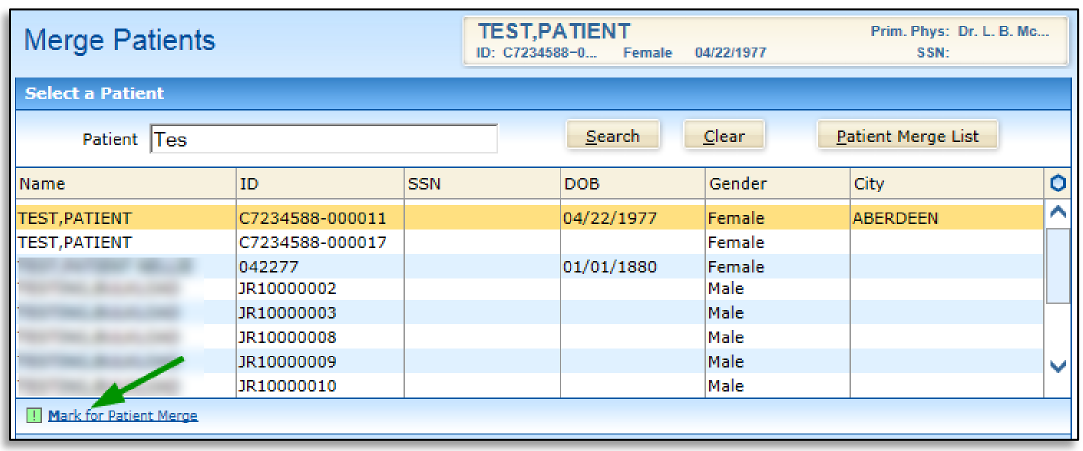


2. On the Merge Patients page, in the **Patient** text box, enter all or part of the patient's name, and then click **Search**.

   The patient records that match the characters that you entered are shown.

3. Select a patient record from the list, and then click the **Mark for Patient Merge** link.

   Tip: If the **Mark for Patient Merge** link is not shown on the Merge Patients page, it is available on the SmartMenu.



   The following message is shown:

   `You are in Patient Merge Mode. Select the patient who will be merged with` *`Last Name,First Name`* `and click the Mark for Patient Merge link or` <u>`click here to exit`</u>.

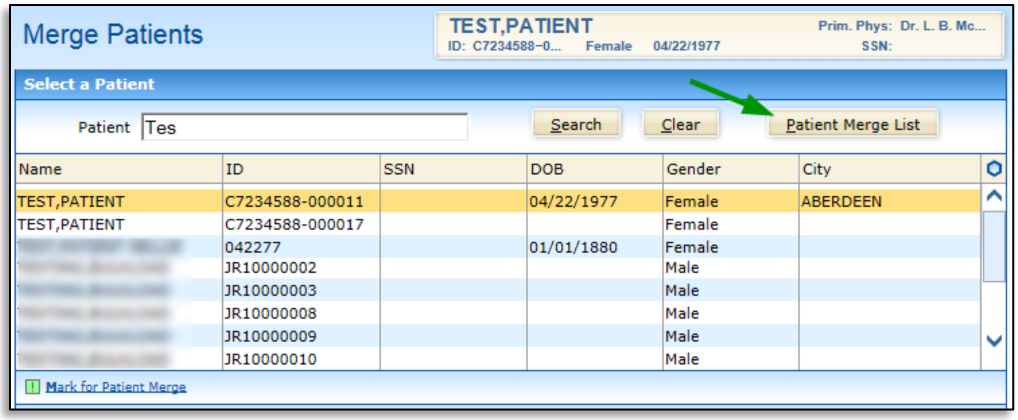
4. Select the duplicate patient record on the list, and then click the **Mark for Patient Merge** link again.

   A message is shown, indicating that the patient records have been marked for the merge operation.

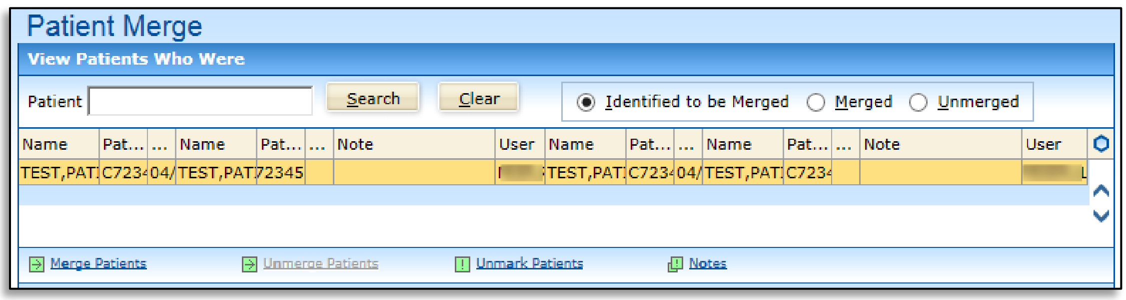
5. Click **OK** to continue.

   Note: You can mark multiple patient records to merge by repeating steps 3 - 5.

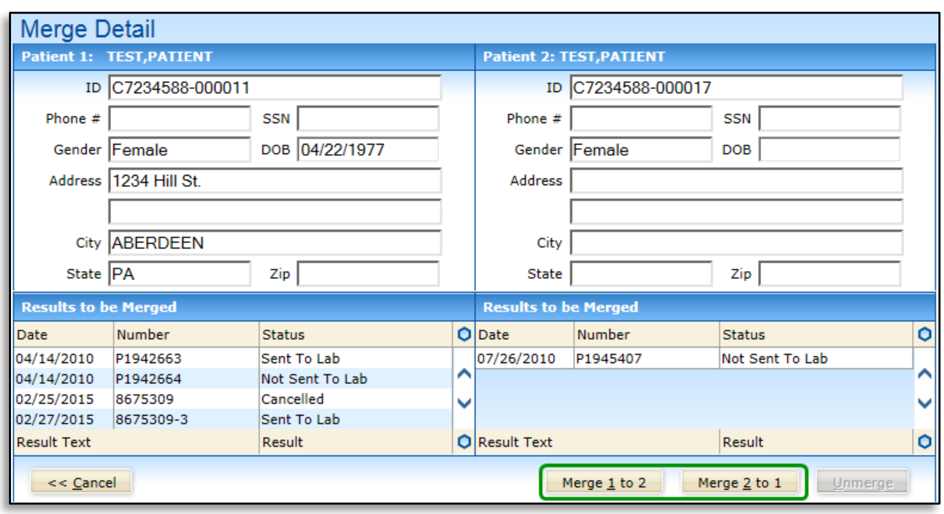
6. Click **Patient Merge List** to display a list of patient records that have been marked for the merge operation.



7. Select the set of records to merge on the list, and then click the **Merge Patients** link to start the merge operation.



8. On the Merge Detail page, compare the patient records to determine which record to keep, and then click either **Merge 1 to 2** or **Merge 2 to 1**.



For example, if the patient information is complete and accurate in the first patient record, but patient information is missing in the second record, click **Merge 2 to 1**. The merge operation copies the orders and results from the second record to the first record. The second record is not deleted, but is no longer shown in the view for that patient.

9. When prompted, click **OK** to confirm the merge.
10. When the merge is complete, click **OK**.

Unmerging Patient Records

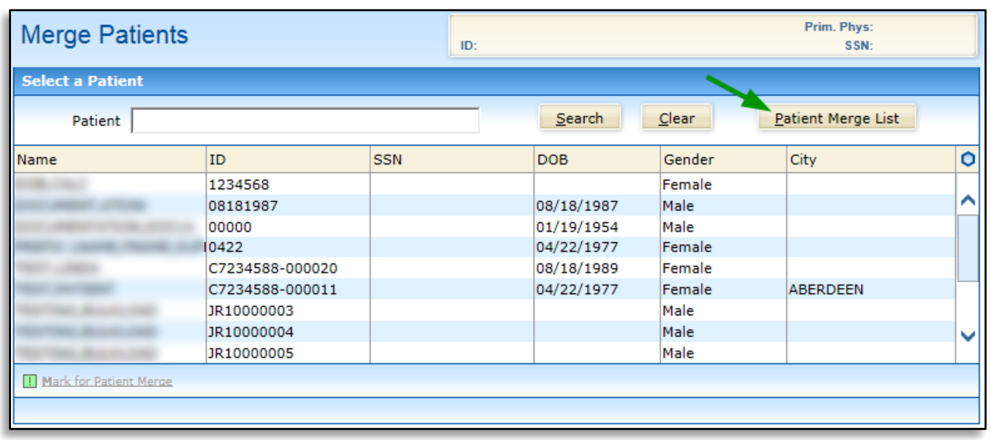
The merge operation merges the orders and results from one record into another, but the second record is not deleted.

Note: You must belong to the Client Supervisor security group to perform this task.

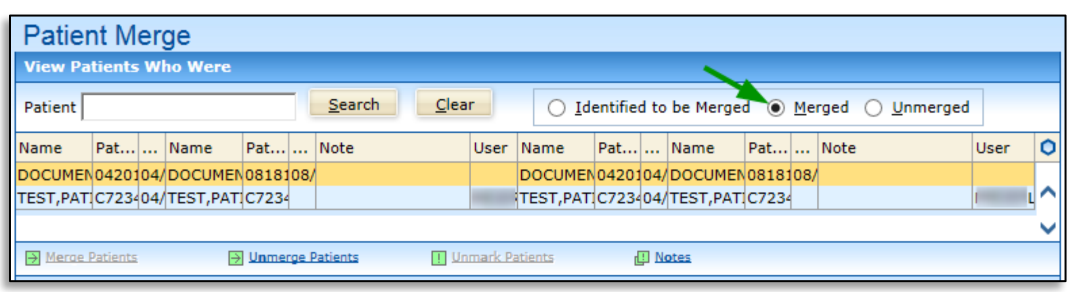
To unmerge patient records that have been merged, follow these steps:

1. On the **Master Files** menu, click **Merge Patients**.

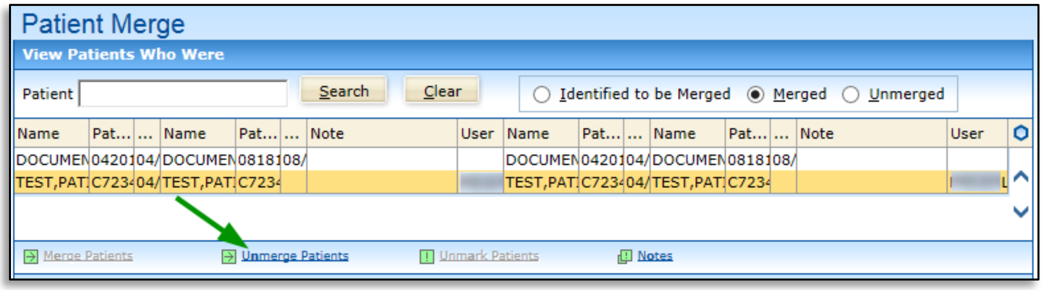
2. On the Merge Patients page, click **Patient Merge List.**



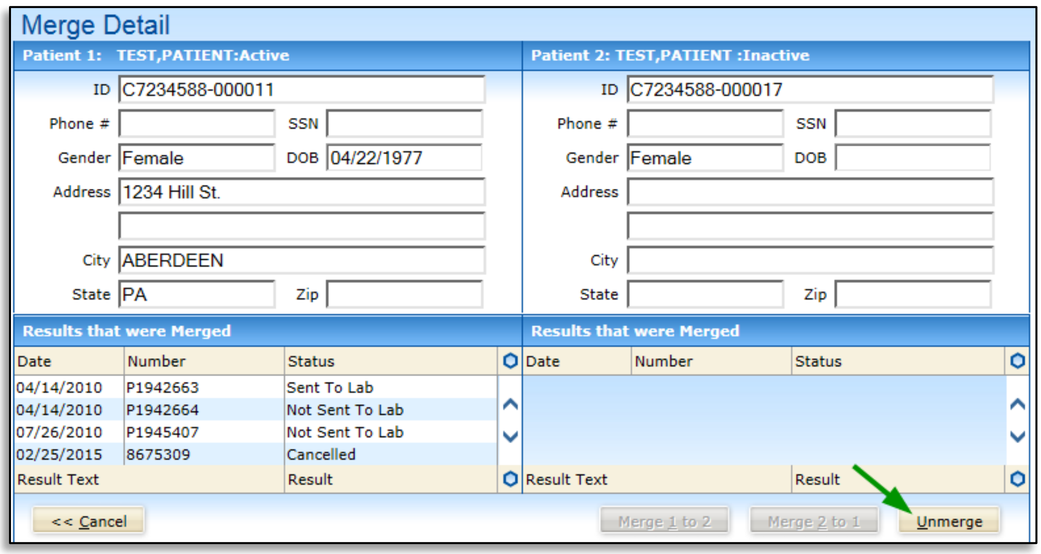
3. Click **Merged** to display patient records that have been merged.



4. Select the set of patient records to be unmerged, and then click the **Unmerge Patients** link.



5. On the Merge Detail page, verify that you selected the records that you want to unmerge, and then click **Unmerge**.



6. When prompted, click **OK** to confirm that you want to unmerge these records.
7. When the unmerge operation is complete, click **OK**.

Administering MayoACCESS Users

As a MayoACCESS administrator, you can perform the following tasks:

- Add MayoACCESS users
- Change user information
- Inactivate a user

Adding a User

To add a MayoACCESS application user, you must define the user and assign the user to a location within a site. All steps for adding a user must be completed before the user can sign in to MayoACCESS.

You need the following information for each user:

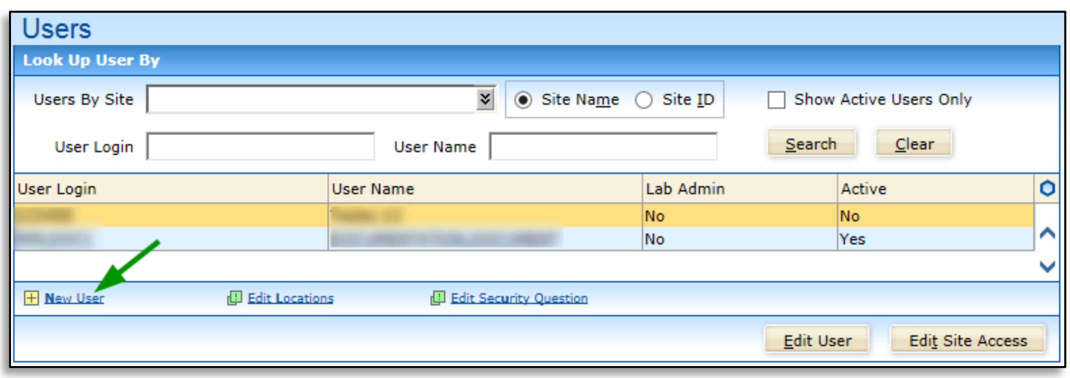
- Last Name, First Name, Middle Initial (optional).
- Email address.
- Level of access. See Step 12 for security group definitions.
- The account number to assign to the user if the client site has multiple accounts.
- The 3-letter abbreviation that Mayo Clinic Laboratories provided to you as a prefix to the User ID.

To add a user, follow these steps:

Note: You must belong to the Client Supervisor security group to perform this task.

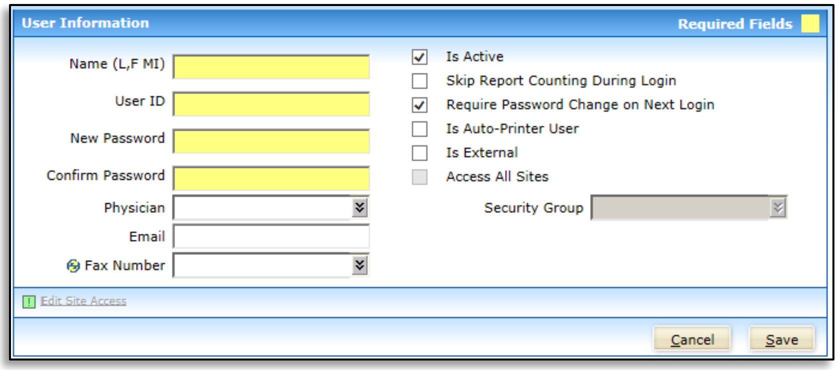
1. On the **System** menu, click **Users.**

2. On the Users page, click the **New User** link.



3. In the User Information dialog box, in the **Name** text box, enter the user's name as follows:

   Last name, first name, middle initial (if available)



4. Enter a unique identifier for the user.

   Use the 3-letter abbreviation that Mayo Clinic Laboratories provided to you as a prefix for the User ID followed by the unique identifier for the user. For example, if the 3-letter abbreviation is ABC and the user is John Smith, you can enter ABCSMITHJ.

   Note: The 3-letter abbreviation is used only for setup. The user will not use the abbreviation to sign in to MayoACCESS.

5. Enter a new password in the **New Password** text box.

   Note: Your password must be a minimum of 8 characters and must contain uppercase, lowercase, numbers, and special characters (except '^').

6. Enter the same new password in the **Confirm Password** text box.

   Note: The user does not need to know the user ID or password. The user ID and password are used only for setup.

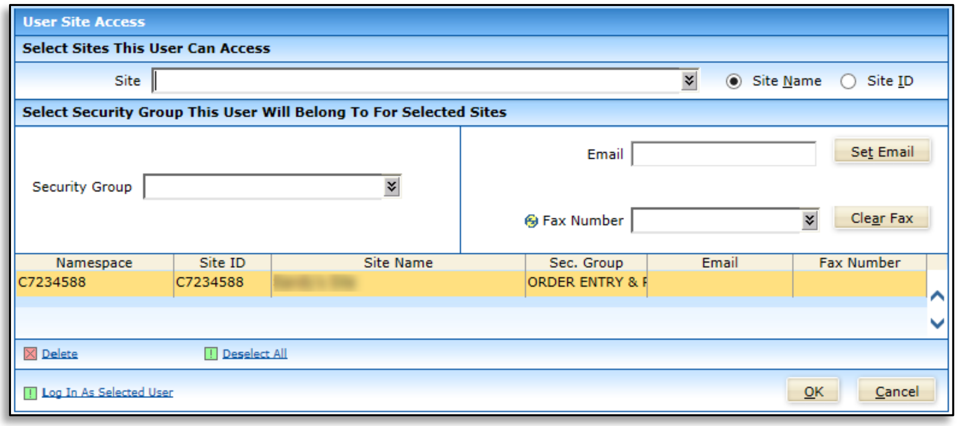
7. Enter the user's email address. A business email address is recommended.

   Note: The user will use the email address to sign in to MayoACCESS.

8. Verify that the **Is Active** check box is selected.

9. Click **Save** to save the new user information.

10. In the User Site Access dialog box, from the **Site** drop-down list, select the site that you want this user to access.



You can select more than one site for each user.

11. From the **Security Group** drop-down list, select the access that you want this user to have.

You can choose from the following security levels:

Security Group	**Available tasks**
Test Catalog	• Access the Directory of Services The user cannot access client information or patient data. This is the most basic role.
Test Catalog & Results	• Access the Directory of Services • Access test results for assigned site This user only needs access to test results.
Order Entry	• Access the Directory of Services • Order tests The user cannot access test results.
Order Entry & Results	• Access the Directory of Services • Order tests • Access test results This is the most commonly assigned user security role.
Pathology Lab Reports	• Access the Directory of Services

Security Group	Available tasks
	• Access test results, specifically supplemental reports or data, for assigned site This role is commonly used by physicians and pathologists for placing orders.
Client Supervisor	• Access the Directory of Services • Order tests • Access test results • Access test utilization reports • Set up new users in the application The user who is assigned to this security role can act as an administrator for the client site.

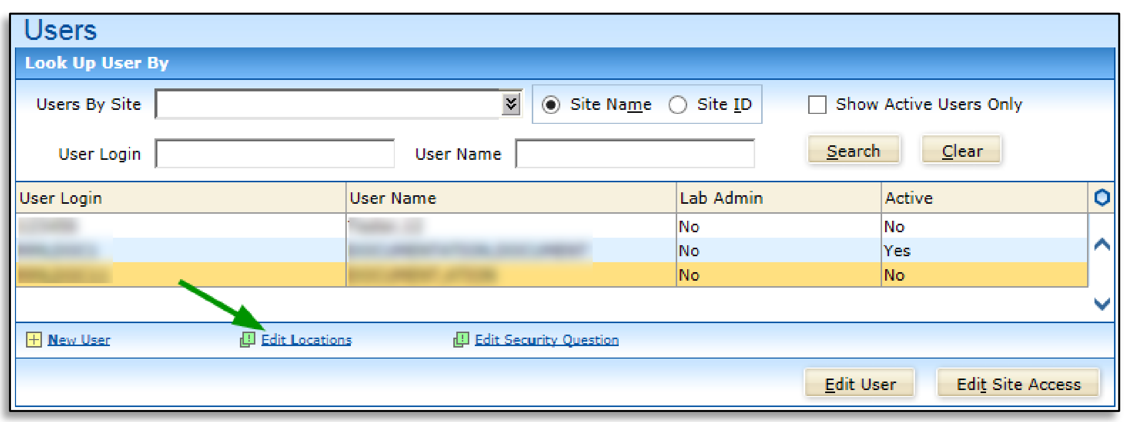
Note: If you want to selected multiple sites and want to select a different security level for each site, select the site, and then select the security level for that site.

Important: Do not enter the email address on the User Site Access page. Duplicate email address entries result in the user receiving duplicate notifications.

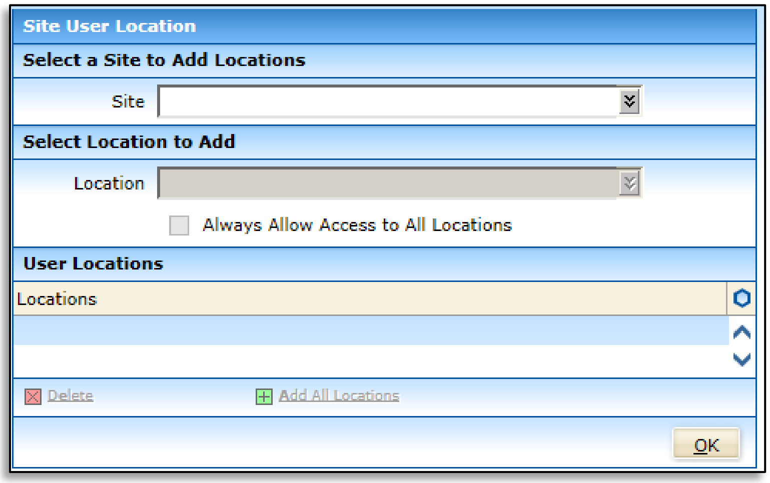
12. Click **OK** to save these settings.

    A message is shown to indicate that site access was added for the user.

13. Click **OK** to continue.
14. To assign the user access to a location within each site, click the **Edit Locations** link.



15. In the Site User Location dialog box, from the **Site** drop-down list, select the site for this user.



16. Use one of the following methods to select the location that you want to enable the user to access:
    - Select the location from the **Location** drop-down list.
    - Click the **Always Allow Access to All Locations** check box.

      This gives the user access to all the locations for this site.
    - Click the **Add All Locations** link. All the locations for this site are shown.

    Note: You can give the user access to more than one location.
17. Click **OK**.

A registered user receives an email with an invitation to sign in to MayoACCESS. A non-registered user receives an email with an invitation to register on mayocliniclabs.com.

Changing User Information

To change the information for a MayoACCESS application user, follow these steps:

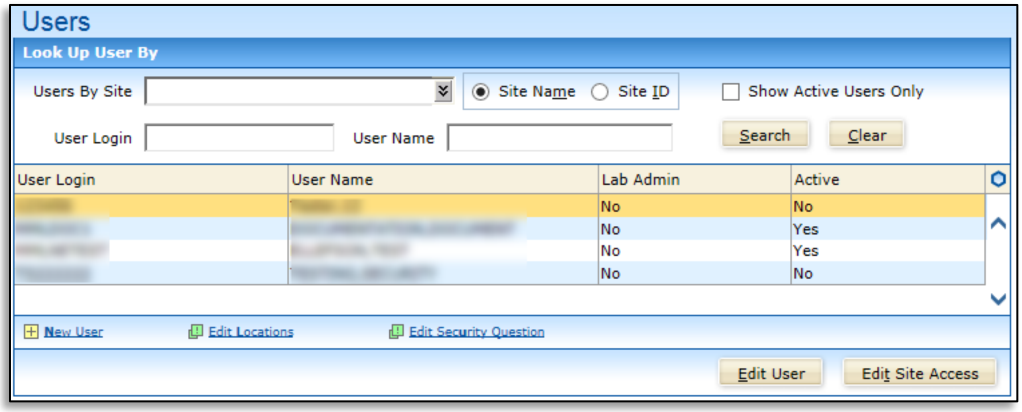
Note: You must belong to the Client Supervisor security group to perform this task.

1. On the **System** menu, click **Users.**

2. On the Users page, select a site from the **Users By Site** drop-down list to display the user records for that site.

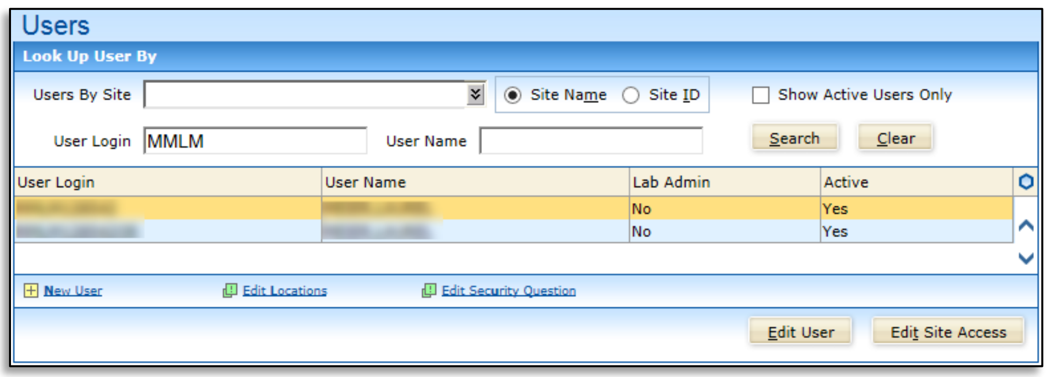
   Tips:

- Leave the **Users By Site** text box blank to search all files.
- Select **Site Name** or **Site ID** to display the list of sites by name or by site ID.

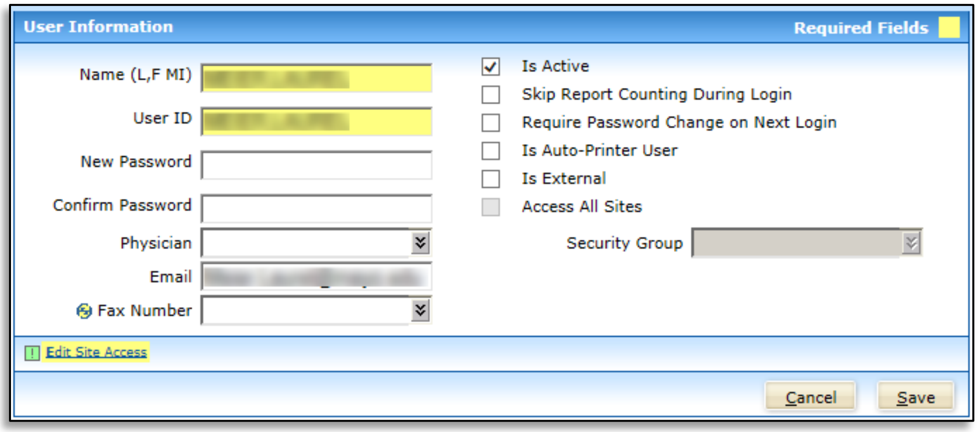


3. Enter some or all the characters for the user in either the **User Login** or **User Name** text box, and then click **Search**.

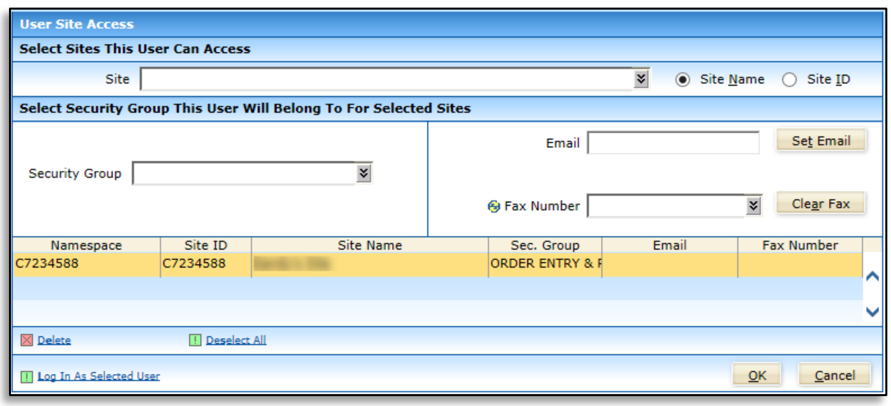
   The list of users that match the characters you entered is shown.



4. Select the user record that you want to change.
5. To change the user name, the user ID, or the security access for the user, click **Edit User**.
6. To change the name or User ID for the user, enter the new information in the **Name** or **User ID** text box of the User Information dialog box.



7. To change the site that the user can access or to change the security access for the user, click the **Edit Site Access** link in the User Information dialog box.
8. To change the site that the user can access, select the desired site from the **Site** drop-down list in the User Site Access dialog box.



9. To change the security access for the user, select the desired security level from the **Security Group** drop-down list.
10. Click **OK** to save the changes.
11. Click **Save** to apply the changes and to close the user record.

Inactivating a User

User records cannot be deleted, so you must inactivate a user if you want to prevent that user from accessing the MayoACCESS application.

Note: You must belong to the Client Supervisor security group to perform this task.

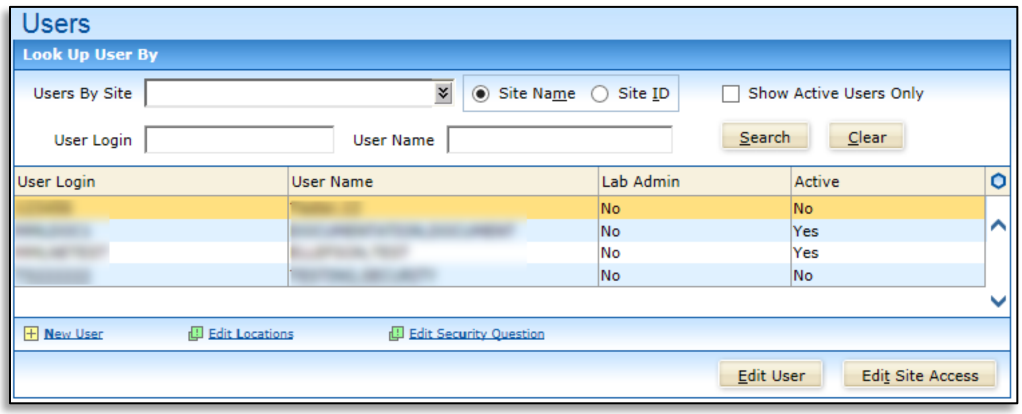
To inactivate a user, follow these steps:

1. On the **System** menu, click **Users.**

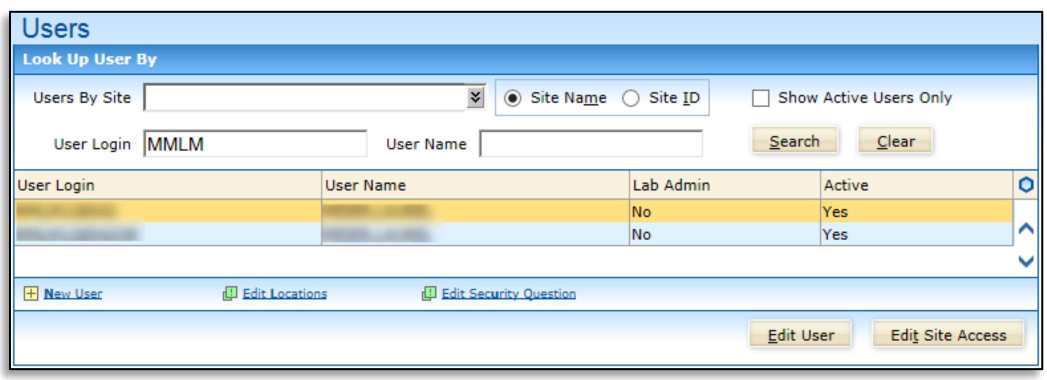
2. To display the user records for that site, select a site from the **Users By Site** drop-down list on the Users page.

   Tips:

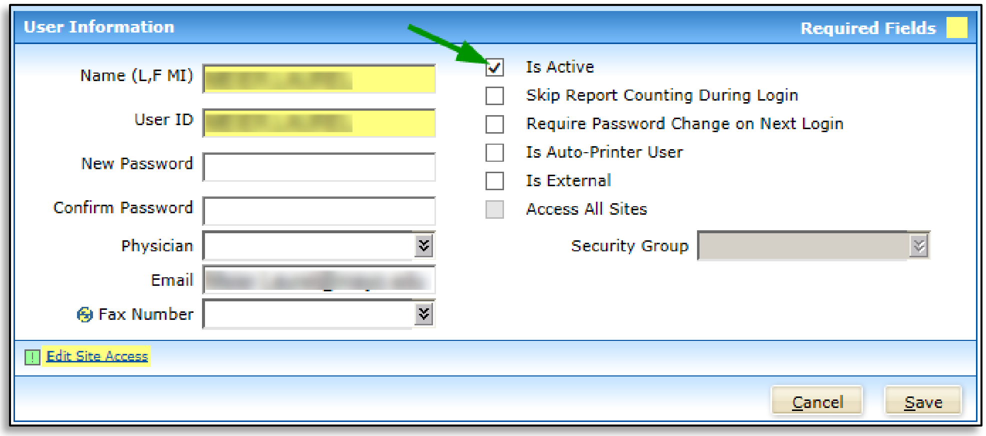
   - Leave the **Users By Site** field blank to search all files.
   - **Select Site Name** or **Site ID** to display the list of sites by name or by site ID.



3. Enter some or all the characters for the user in either the **User Login** or **User Name** text box, and then click **Search**.
4. From the list of users that is shown, select the record for the user that you want to inactivate.



5. Click **Edit User**.



6. In the User Information dialog box, clear the **Is Active** check box, and then click **Save**.

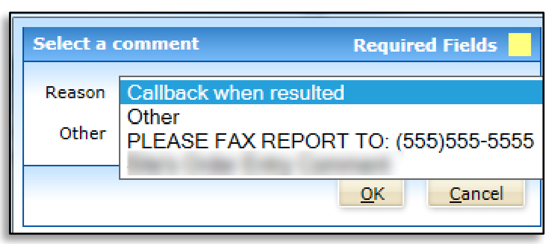
Customizing the MayoACCESS Application

As a MayoACCESS administrator, you can customize the MayoACCESS application for your users by performing the following tasks:

- Creating comments
- Creating a custom profile
- Creating a list of frequently ordered tests

Creating Comments

You can create comments that users can select when they perform certain actions within the MayoACCESS application. The following figure shows example comments that are displayed when you click the **Report Notes** link on the New Order page:

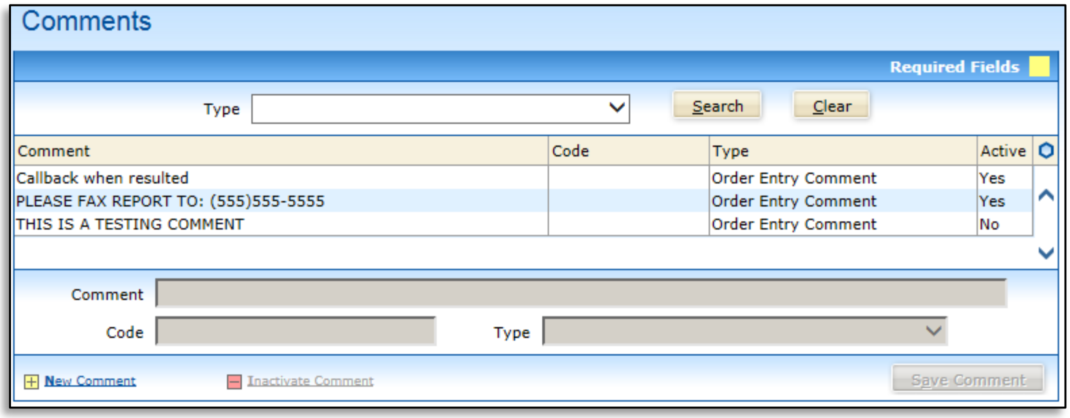


Note: You must belong to the Client Supervisor security group to perform this task.

To create a comment, follow these steps:

1. On the **Master Files** menu, click **Comments**.

2. On the Comments page, click the **New Comment** link.



3. In the Comment text box, enter the comment that you want to add.
4. From the **Type** drop-down list, select that activity for which you want the comment to be displayed.
5. Click **Save Comment**.

To change a comment, select the comment, change the comment, and then click **Save Comment**.

To inactivate the comment, select the comment, and then click the **Inactivate Comment** link**.**

Creating a Custom Profile

You can create a single code to group multiple tests. This single code is called a custom profile. You can use a custom profile to save time when you frequently order the same tests together. You can create, change, or delete a custom profile.

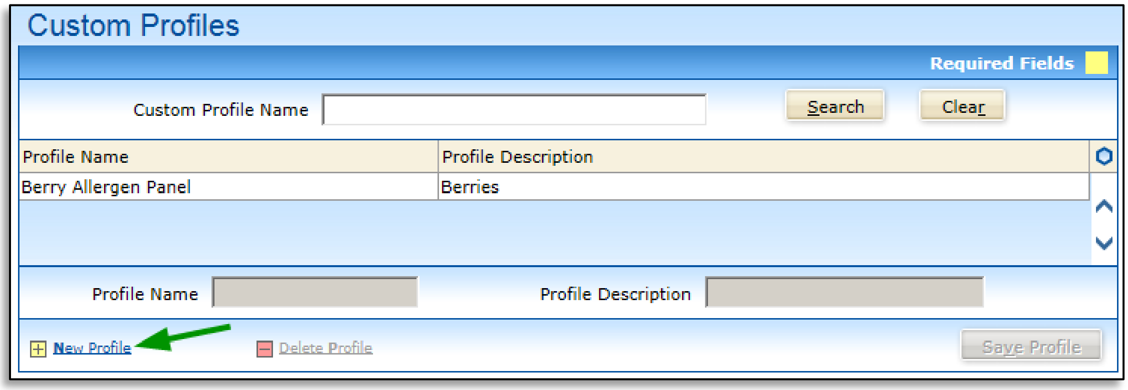
Notes:

- Custom profiles cannot be used for interfaced orders.
- You must belong to the Client Supervisor security group to perform this task.

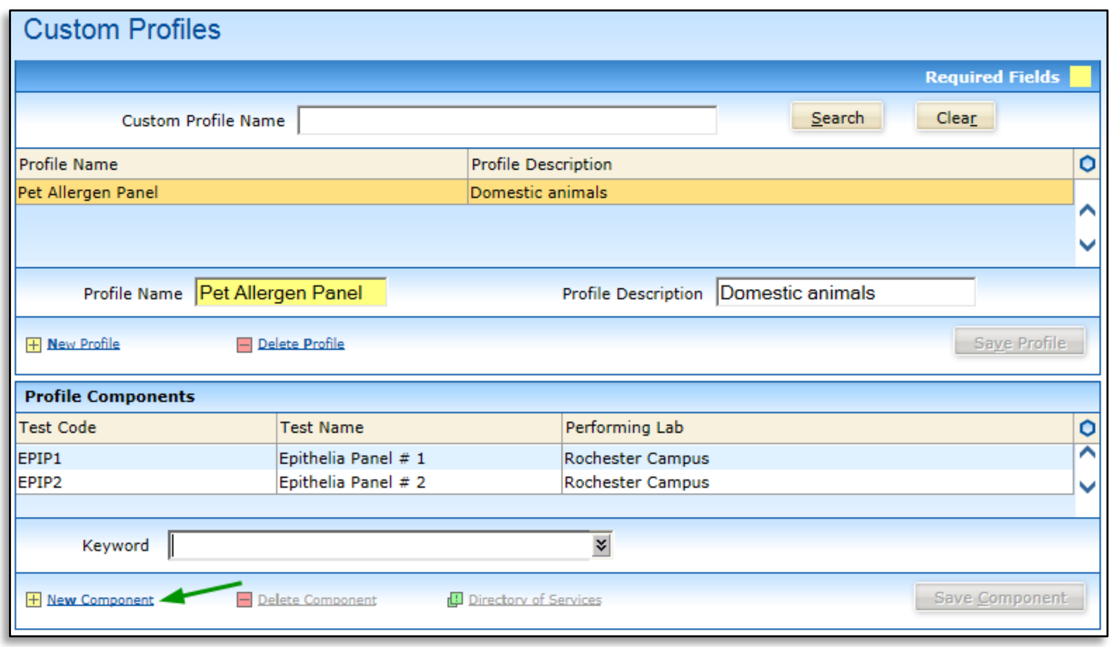
To create a custom profile, follow these steps:

1. On the **Master Files** menu, click **Custom Profiles**.

2. On the Custom Profiles page, click the **New Profile** link.



3. In the **Profile Name** text box, enter a name for the custom profile.
4. **Optional:** In the **Profile Description** text box, enter a description for the custom profile.
5. Click **Save Profile**.
6. Click the **New Component** link.



7. Enter the test name, test code, or test mnemonic in the **Keyword** text box, or select the test from the drop-down list.
8. Click **Save Component**.
9. Repeat steps 7 - 8 to add tests to the custom profile**.**

   Note: If you do not click the **New Component** link before you add a test, the selected test replaces the current test.

To delete a test from a custom profile, highlight the test and click the **Delete Component** link.

To delete a custom profile, highlight the profile and click the **Delete Profile** link.

Creating a Short List of Frequently Ordered Tests

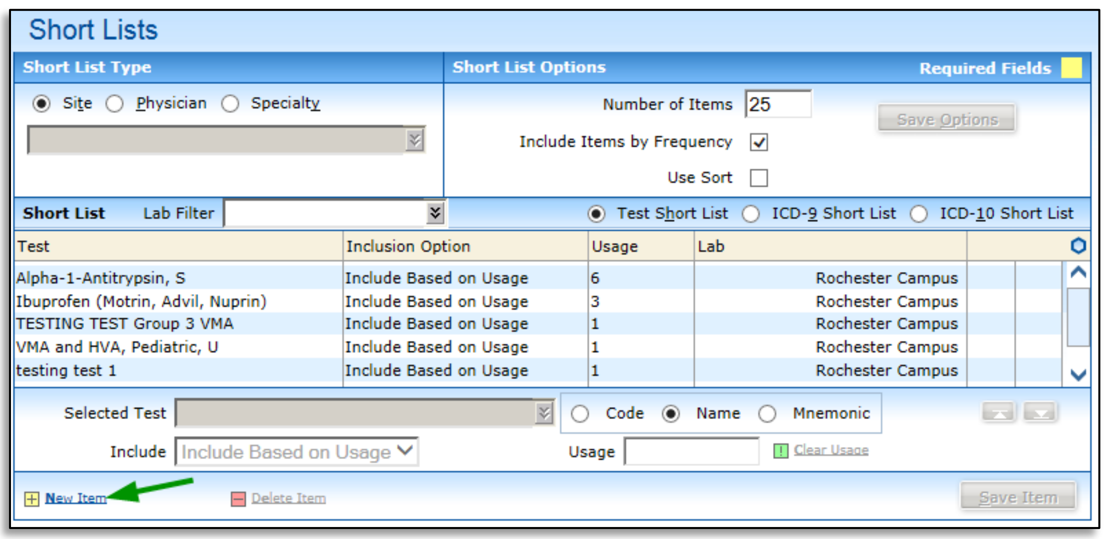
You can create a list of frequently ordered tests. This list is called a short list. The short list is shown on the New Order page and enables you to quickly select a test, rather than look it up. Short Lists can be created for and organized by site, physician, or specialty.

Note: You must belong to the Client Supervisor security group to perform this task.

To create a short list, follow these steps:

1. On the **Master Files** menu, click **Short Lists**.

2. To add a test, click the **New Item** link on the Short Lists page**.**



3. Enter the test name, test code, or test mnemonic in the **Selected Test** text box, or select the test from the drop-down list.

4. From the **Include** drop-down list, select when the test is displayed in the short list.

   The available options are as follows:

Option	**Description**
Include Based on Usage	Tests are shown based on how frequently they are ordered.
Always Include	The selected test is always shown in the short list.
Never Include	The selected test is never shown in the short list.

5. Click **Save Item**.

To delete a test from the short list, select the test that you want to delete and click the **Delete Item** link**.**

Resolving InfoLink Issues

InfoLink issues are messages about events in the MayoACCESS application. For example, if you request a callback when test results are available, an Infolink Callback issues is generated. These issues are generated automatically or occur as a result of a system event. The issues types that you see are controlled both by the security group to which you belong and parameters of the issues.

An InfoLink issue might not be related to an order. When an issue is related to an order, you can use SmartLinks on the InfoLink Inbox page to perform the following additional tasks:

Task	SmartLink
View detailed information about the issue and edit the issue notes.	Issue Detail
Change the status of the selected issue from Read to Unread or from Unread to Read.	Mark As Read or Unread
Change the status of all the issues shown on this page from Read to Unread or from Unread to Read.	Mark All as Read or Unread
View the order that is associated with the selected issue.	Find Order
Generate the post-batch processing report for the selected issue.	Post Batch Processing Report
Specify callback settings for the selected order.	Order Issue Management

Note: SmartLinks that are not shown on the InfoLink Inbox page are available on the SmartMenu.

InfoLink Issue Types

The InfoLink issue types are described in the following table:

Issue types	Description
Callback	Generated when a Callback request is added when a user places a new order or when a user batches an order.
ES Order Received – Duplicate Result Codes	Generated when an order is received from an electronic system (ES) that contains duplicate result codes.
Fax Report – Faxback	Generated when a user requests a faxback of a report while the user places a new order or when the user batches an order.
Faxback Request	Generated when a Faxback request is added to an order. This issue remains in a New status unless it is removed from an order.

Issue types	Description
HL7 Test Cancel Rejected	Generated when the request to cancel a test is rejected.
Insurance Provider Priority Changed	Generated when an ADT or ORM HL7 file is processed into the system and the priority of an insurance provider changed.
Insurance Provider Removed from Encounter	Generated when an ADT or ORM HL7 file is processed into the system and an insurance provider is removed from the encounter.
Insurance Provider Status Changed	Generated when an ADT or ORM HL7 file is processed into the system and an insurance provider is removed from the Associated Insurance Provider list.
Missing Required Information	Generated when an order is saved with missing information that does not delay the order. This issue is generated for each blank required field, such as date of birth (DOB) or ask-at-order-entry (AOE) question.
Missing Required to Save	Generated when information is missing that is required before batching an order. This issue is generated for each required field on the order.
Patient Demographics Updated	Generated when a patient ID, patient name, or date of birth has been changed.
Supplemental Data Received	Generated when a digital image has been uploaded for an order.
Supplemental PDF Report Loaded	Generated when a supplemental PDF that contains results has been attached to a report.
Test Manually Cancelled	Generated when a user cancels a test for an order by using the Cancel Test link.
Unable to Create Order	Generated when an order with errors is received by the MayoACCESS application.
Unbatchable Order	Generated when an order is received that has an associated issue or another problem, such as invalid test code, obsolete test ordered, or unknown test received, which makes that order unbatchable.
Unknown Test Received	Generated for test results that are sent from the performing lab to an ordering site that has no record of the test in the Test Catalog.

Issue types	Description
Unsolicited Result Received	Generated when a result is sent from the performing laboratory to an ordering site and there is no association between the sent result and the test that belongs to the laboratory order in the Test Catalog.

Viewing InfoLink Issues

You can view all InfoLink issues from the InfoLink Inbox page, or you can view issues that are associated with a specific order from the following pages:

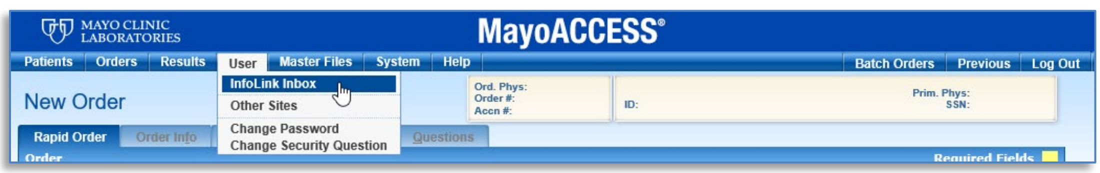
- Orders
- Reports
- Batch Processing

To view all issues or search for specific issues, use the InfoLink Inbox. To view issues associated with a specific order, go to the Order Search, Reports, or Batch Processing pages. The following topics describe how to view issues.

Viewing Issues in the InfoLink Inbox

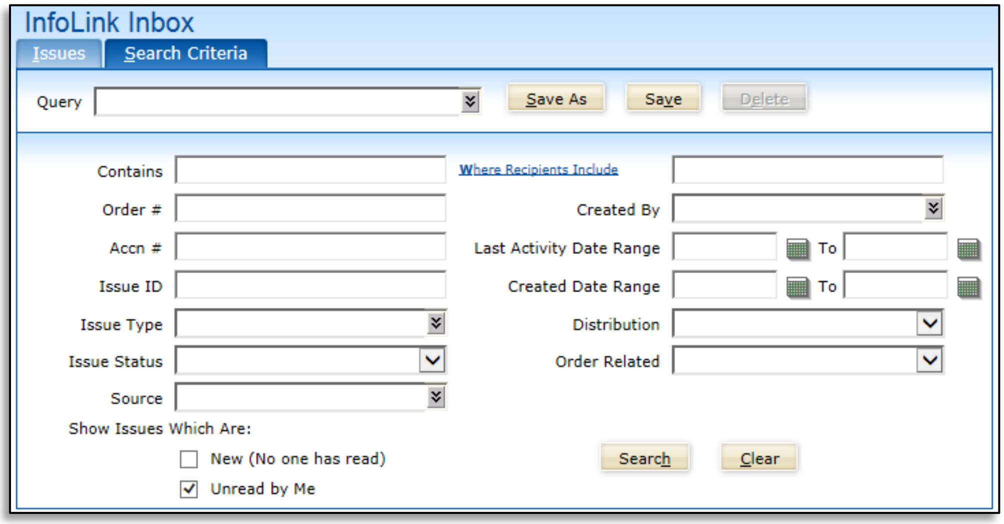
To view InfoLink issues, follow these steps:

1. On the **User** menu, click **InfoLink Inbox**.



The issues for the previous 7 days are shown on the InfoLink Inbox page. The detailed description for the selected issue is shown in the **Description** text box. From this page, you can view or print the issue information, change the issue details, mark the issue as read, and find the order that is associated with an issue.

2. To search for specific issues, click the **Search Criteria** tab.



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

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

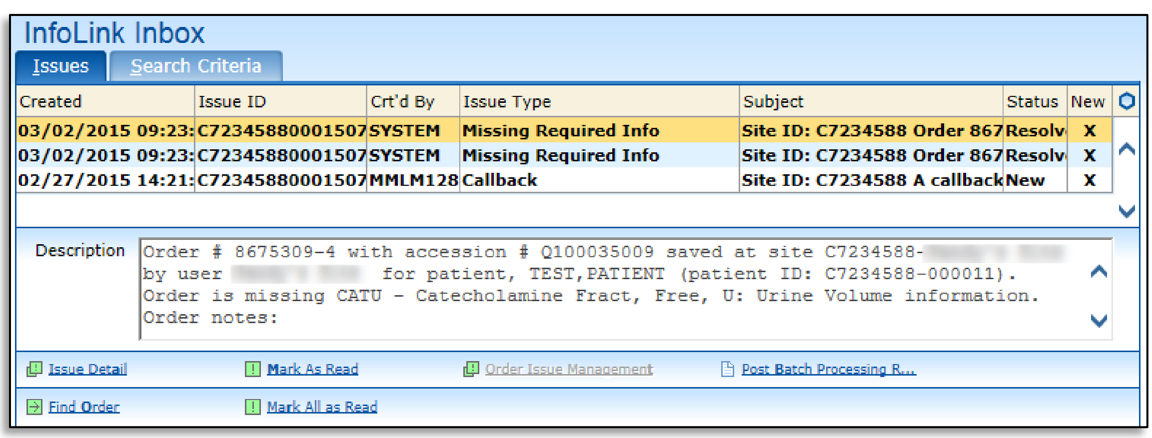
Search Criteria	Description
Contains	Any text that occurs in the subject, description, or notes of the issue
Order #	The order number from your Laboratory Information System (LIS) if this field was sent on the original order. If this order number was not submitted, the order number is the same as the accession number.
Accn #	The accession number that the MayoACCESS application assigned to the order
Issue ID	The ID number assigned to the issue
Issue Type	The type of issue. For example, you can search for unsolicited test or unknown result issues.
Issue Status	The status types of the issue. For example, you can search for issues that are new, in progress, or resolved.
Source	The source of the order that is associated with an issue. Integrated orders originated from a Laboratory Information System (LIS) and manual orders originated from the MayoACCESS application.

Search Criteria	Description
Show Issues Which Are	• New Issues that no one has viewed • Unread by Me Issues that you have not viewed
Where Recipients Include	The specified recipients of a private issue
Created By	The creator of the issue
Last Activity Date Range	The range of dates during which the issue was last changed **Tip:** Use the calendar icons to specify the dates.
Created Date Range	The range of dates during which the issue was created **Tip:** Use the calendar icons to specify the dates.
Distribution	Whether the issue is classified as public or private. Private issues are those that specify a certain user as the recipient of the issue.
Order Related	Whether the issue is related to an order

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

4. Click **Search**.

   The issues that match the specified search criteria are shown. The **Description** text box shows the issues that are associated with the selected order or result. Use the scroll bar on the right side to view all the text in the text box.



Viewing Issues for a Specific Order

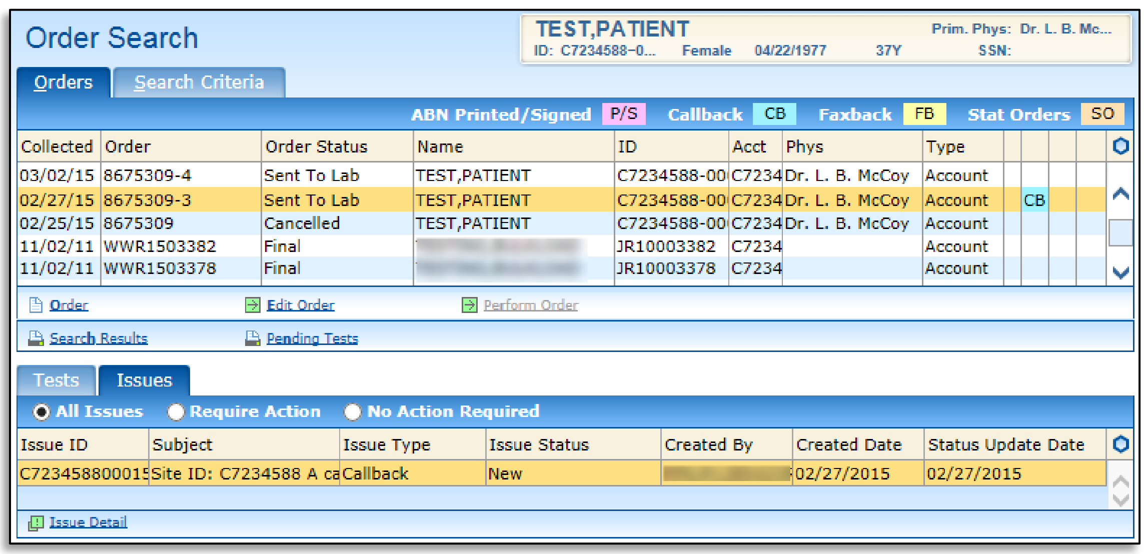
To view issues associated with a specific order, follow these steps:

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

   Tip: Alternatively, you can view issues on the **Reports** page or the **Batch Processing** page.

2. On the Order Search page, click the **Orders** tab.
3. Select the order or patient that you want to view.
4. Click the **Issues** tab.

   Issues for the selected order are shown.



Frequently Asked Questions

The following topics contain answers to frequently asked questions (FAQ) about the MayoACCESS application.

User Setup, Account Number, and Login

Q: Who can set up new MayoACCESS users?
A: Users that belong to the MayoACCESS Client Supervisor security group can set up new MayoACCESS users. Typically, within a facility, supervisors and shift leads belong to this security group and can thus set up new MayoACCESS users. To learn who can set up new users, check with the supervisor at your facility.

Q: When adding up a user must I begin the user ID with the 3-letter prefix?
A: Yes. Each facility is assigned a unique 3-letter prefix to quickly identify the user and the facility and to ensure that every user has a unique ID.

Q: I just set up a new user, but she is receiving a message that she does not have a location assigned to her and that she should contact the system administrator. Do I need to call Mayo Clinic Laboratories to fix this issue?
A: No. Setting up a user is a two-part process. The first part is to specify the user information and the second part is to give the new user access to a location. To complete the second part of the process, follow these steps:

1. Log in to the MayoACCESS application.
2. On the **System** menu, click **Users.**
3. On the Users page, locate and select the user.
4. Click the **Edit Locations** link.
5. Select the location for this user from the **Location** drop-down list.
6. Click **OK**. The new user should now be able to log in to the MayoACCESS application.

Q: My facility has multiple locations under one site. Do I need to remember each of the account numbers when I log in to the MayoACCESS application?
A: No. Your MayoACCESS user ID is set up with access to specific accounts. For a single-site location setup, when you log in, you immediately see your account. For a multiple-site location setup, when you log in, you are prompted to select the location that you want to access.

Q: I work in a facility with multiple locations for our site. How I do I switch between locations?
A: On the MayoACCESS pages where switching locations is an option, such as the Search Criteria for the Order Search or Reports pages, a **Location** drop-down list is available. Select the location that you want from this drop-down list.

Q: Must I log out to switch to a different site?
A: No. You can select a different site by clicking **Other Sites** on the **User** menu.

Q: Is there a quick way to view my account number while I am logged in?
A: Yes. Your account number is shown on the bottom of the MayoACCESS window.

Q: I have not logged in to the MayoACCESS application for some time and now I am unable to log in. Why?
A: For security reasons, the MayoACCESS application inactivates a user after 180 days of inactivity. Contact your supervisor or anyone who belongs to the Client Supervisor security group, or higher, to activate your user ID. If no one with this authority is available, you can contact Mayo Clinic Laboratories to request user activation.

Note: When your user ID is activated, you must log in to the MayoACCESS application within 24 hours or your user ID is inactivated.

Q: How long will the MayoACCESS application remain open with no activity?
A: For security reasons, users are logged out of the MayoACCESS application after 30 minutes of inactivity.

Passwords

Q: Can I change my password whenever I choose?
A: You can change your passwords whenever you want. To change your password, go to your Settings page on mayocliniclabs.com and click **Edit**.

Q: What do I do if I have forgotten my password and need to have it reset?
A: Click the **Need help logging in?** link on the MayoACCESS Sign In page.

Orders, Batching, and Labels

Q: Can I use a test name, test code, or test mnemonic to order a test in the MayoACCESS application?
A: No. You must use the Mayo Clinic Laboratories test ID when you order a test. If you do not know the test ID, click **Add Tests** on the New Order page to look up a test, or access the Directory of Services to look up the test ID. You can search the Directory of Services by test name, test code, test mnemonic, or alias.

Q: While using the rapid order function, can I see the test name when I enter the test code in the **Tests** text box?
A: No. The test names are not shown on the Rapid Order page. If you want to view the test names, click **Add Tests** or use the standard order entry option.

Q: Is it possible to access the short list and custom profiles when I use the rapid order function?
A: Yes. Complete only the required fields on the Rapid Order page, and then click **Continue**. The short list is shown, and you have the option to open the custom profile page.

Q: Do I need to order a test to view the MayoACCESS Directory of Services?

A: No. To access the MayoACCESS Directory of Services, click **Directory of Services** on the **Orders** menu or click **Directory of Services** in the extended frameset.

Q: Can I format the way the information that I enter in Performing Lab Notes or Report Notes is displayed on the batch sheet or on the reports?
A: No, these fields are simply text boxes for transmitting additional information. Using formatting, such as carriage returns, does not change the formatting on the batch sheets or reports.

Q: What is a Miscellaneous (ZW) Test?
A: A Miscellaneous Test is defined as a generic code that is used for a Mayo Clinic Laboratories test or for referral test that is performed outside of Mayo Clinic Laboratories.

Q: Can I order multiple Miscellaneous (ZW) tests on one accession?
A: Yes. If you have multiple Miscellaneous tests going to the *same* referral lab (such as Focus), you can order up to four Miscellaneous tests in the same accession.

Q: Can I order the same Miscellaneous (ZW) test code multiple times on the same accession?
A: No. You can order only one laboratory-specific Miscellaneous test per order number. If you want to order additional tests from the same referral lab, you must use separate accessions.

Q: Sometimes, I want to change a patient name after I have sent an order, but when I go to the Patient Demographics page, the **Name** text box is dimmed. How can I change the name for that patient and for that order?
A: You cannot change the patient information if tests results are pending for that patient. If you want to change the patient information, contact Mayo Clinic Laboratories. Mayo Clinic Laboratories will update the Laboratory Information System (LIS) to ensure that the test results are correctly identified for that patient.

Q: How do I change the patient information prior to sending another order when test results are pending and the **Name** text box is dimmed?
A: In this case, put the correct patient name in the **Name** text box when you order the test to ensure that the test order and all future test orders are correct.

Q: What constitutes a batch in the MayoACCESS application and is it confined to one batch sheet?
A: A batch is a set of orders separated by Location, Performing Lab, Temperature, and Special Conditions. A batch consists of no more than six orders, and the batch sheet might be printed on multiple pages.

Q: Must I use MayoACCESS batch sheets or can I use my own LIS batch sheet?
A: Mayo Clinic Laboratories requires the use of MayoACCESS batch sheets for all specimens. This enables courier tracking and clear specimen identification when the specimen is received at Mayo Clinic Laboratories.

Q: When packing my specimens, what do I do if multiple sheets of paper are printed for the batch that I just closed?

A: Separate the specimens and batch sheets according to transport temperature. If there are multiple sheets for the same temperature of the same batch, fold them together and place them in a transport bag with the bar code facing out.

Q: How many orders does the MayoACCESS application allow per batch?
A: The MayoACCESS application batches up to six orders in a set.

Q: How can I add a test to an order after the order has been batched?
A: You can add a test to an order, even after the batch is closed. Follow the appropriate steps for your situation.

If the specimen is still at your facility, follow these steps:

1. Order the test in the MayoACCESS application.
2. In the **Performing Lab** text box, specify that this is a test update.

   Note: If applicable, indicate whether Mayo Clinic Laboratories should share this specimen with other testing.

3. Close the batch.
4. Match the paperwork to the corresponding specimen, and send the specimen to Mayo Clinic Laboratories.

   Note: The batch sheet indicates that this test is a rebatch. Rebatches only contain the test that was added after the initial batch.

If the specimen is en route to Mayo Clinic Laboratories, follow these steps:

1. Order the test in the MayoACCESS application.
2. In the **Performing Lab** text box, specify that this is a test update.

   Note: If applicable, indicate whether Mayo Clinic Laboratories should share this specimen with other testing.

3. Close the batch.

   Note: You need not send this rebatch paperwork to Mayo Clinic Laboratories.

If the specimen has a status of **Specimen Receipted**, contact Mayo Clinic Laboratories.

Q: Must I write a note about adding the test on the batch sheet?
A: No. If you submitted the Add Tests to an Order form to Mayo Clinic Laboratories, you need not write on the batch sheet. However, you can optionally attach a copy of the Add Tests to an Order form to the batch sheet and send the form with the specimen.

Q: How can I cancel a test on an order after the order has been batched?
A: To cancel a test after the batch that contains the order is closed, but before Mayo Clinic Laboratories receives the specimen, follow the instructions in Cancelling a Test on page 57.

You can also contact Mayo Clinic Laboratories or the other performing laboratory to request a test cancellation.

Note: If you do not cancel the test, Mayo Clinic Laboratories performs the test and bills your facility.

Q: Must I write a note about cancelling a test on the batch sheet?
A: No. If you cancelled the test or contacted Mayo Clinic Laboratories to cancel the test, the test is electronically cancelled and it is not necessary to write a note on the batch sheet. In addition, if the cancelled test is the only test in the batch, you need not send that paperwork to Mayo Clinic Laboratories.

Q: The batch sheet and labels show a transport temperature of R for refrigerate, but I know that Mayo Clinic Laboratories will accept a frozen specimen. How do I notify Mayo Clinic Laboratories that I am sending a specimen at a temperature that is different from that listed on the labels and batch sheet?
A: The preferred temperature for specimens is printed on the specimen labels and batch sheets, but Mayo Clinic Laboratories does recognize and accept other temperatures for some specimens. You cannot change the temperature in the MayoACCESS application, so you must cross out the temperature on the batch sheet and write in the correct shipping temperature in red ink. Be sure to package the specimen in the correct shipping temperature bag.

Q: When I ordered a test, I did not have all the information to answer the test questions and now the laboratory is missing information that is needed for testing. Is it acceptable to write the missing answers on the batch sheet?
A: No. You can enter the missing information in the MayoACCESS application before you close the batch that contains the order. If the information is missing when the batch that contains the order is closed, a missing information form is printed. Complete and fax the missing information form to Mayo Clinic Laboratories.

Q: Is it acceptable to send additional paperwork with the missing information form to save rewriting time or to prevent an error that might result from misinterpretation?
A: Yes. The preferred method for sending missing information is by using the missing information form. However, if you want to send additional paperwork, fax the information along with the missing information form to Mayo Clinic Laboratories.

Q: Sometimes additional information relates to a specimen, such as a shared specimen, an additional specimen, or a difficult collection, that I want to share with Mayo Clinic Laboratories. In those cases, is it acceptable to write that information on the batch sheet?
A: Although in unique circumstances it might be appropriate to make a note on the batch sheet, it is preferred that you instead use the **Performing Lab Notes** text box on the Order Details page. The information in this text box is printed on the batch sheet and sent to Mayo Clinic Laboratories.

Q: Many of the questions in the MayoACCESS application allow free-form text entry. Is there a preferred answer for the following questions?

- Duration
- Volume
- Source
- Dosage

- Time
- Date

A: Yes. The preferred answers for these questions are shown in the following table:

Question	Answer
Duration	Enter the duration as one of the following values: • 12 • 24 • Random Do not add other text, such as `hours` or `hrs`.
Volume	Enter the volume as a number, such as `250` or `1200`. Do not add text, such as `milliliters` or `ml`.
Source	Be very specific when you enter a source. The more detailed, the better. Examples include `Left Eye`, `Right Big Toe`, `Left Forearm`.
Dosage	Enter the dosage as a number, such as `5`. Do not enter text, such as `mg`.
Time	Enter the time in military format. For example, enter `0200` for 2:00 a.m. or `1400` for 2:00 p.m. **Tip:** You can enter `N` for the current time.
Date	Enter the date in the following format: `MM/DD/YYYY` For example: `02/14/2014` **Tip:** You can enter `T` for today's date, oryou can enter `T+`*n* for a future date, where *n* is the number of days from today. For example, enter `T+1` for tomorrow's date.

Q: I have been a client of Mayo Clinic Laboratories for a long time and have special insurance needs that previously were handled by stamping billing information on the batch sheet. Should this practice continue with the MayoACCESS application?
A: The MayoACCESS application can address some special billing circumstances. Contact the Mayo Clinic Laboratories billing office at 800-447-6424 for options of how demographics should be delivered. Do not write or stamp billing information on the batch sheet.

Q: Can I reprint labels, orders, batch sheets, and missing information forms in the MayoACCESS application?
A: Yes. On the **Orders** menu, click **Order Search**. You can view and print any of these items from that page.

Tip: You can access the functions to print specimen labels, orders, missing information forms, and batch sheets from the SmartMenu.

Q: Must I use MayoACCESS specimen labels or can I use my LIS labels?
A: You need not use MayoACCESS specimen labels if you have labels from your LIS. However, you might find that using MayoACCESS labels simplifies the process for your sendout departments because the MayoACCESS labels match the batch sheet and clearly indicate the specimen transport temperature.

Q: Does Mayo Clinic Laboratories ever require that specimen labels be taped on specimen containers?
A: It is not required, but Mayo Clinic Laboratories strongly recommends that you place a single piece of tape over the labels on frozen specimens to prevent the labels from coming off in transit. Labels that come off in transit cause delayed turnaround time and require another specimen collection because the specimen is no longer labeled for identification. When you tape the label to the specimen container, do not cover the bar code and be sure to use only a single piece of tape per label.

Q: When shipping, how should I fold the batch sheet to protect patient privacy?
A: Fold the batch sheet in quarters, and place it in the outside pocket of the bag with the upper-right corner visible. The bar code on the batch sheet must be visible for the courier to scan, but the patient information should not be visible.

Q: Why does my batch sheet split the order onto different accessions, when I order two tests on a single order, where one test was for a Microbiology test and the other for a CoPath test?
A: The batch sheet indicates that tests are on different accessions if they are going to different performing laboratories at Mayo Clinic Laboratories. The test results will return to a single order in the MayoACCESS application and to your interface.

Integrated Orders

Q: My laboratory ordering system requires the reuse of accession numbers. What is the default time period that must pass before I can reuse accession numbers?
A: The default MayoACCESS setting for reusing accession numbers is 75 days. You can change this number to match for your Laboratory Information System (LIS).

Q: I ordered a test in my LIS, but when I logged into the MayoACCESS application to close the batch, the order was unbatchable. How do I fix the order so I can close the batch?
A: Use the MayoACCESS application to determine the reason for the unbatchable order, and then correct the order in your LIS and retransmit the order to the MayoACCESS application. If applicable, you might need to cancel the test in the MayoACCESS application as well as in your LIS.

Q: What if I cannot fix the problem and retransmit the order from my LIS?

A: If you are unable to fix and retransmit the order from your LIS, change the order in the MayoACCESS application to get it ready for batching, and then correct the order in your LIS.

Multiple Performing Laboratories

Q: I am in the process of switching the majority of my sendout work from the Rochester laboratories to the Jacksonville laboratories. How long should I leave the Rochester tests active in my LIS to receive pending results?
A: Turnaround time is very test specific; therefore you need monitor the orders that are pending results from your LIS to determine when you can inactivate the Rochester tests in your LIS.

Results

Q: How long are results stored and retrievable in the MayoACCESS application?
A: The MayoACCESS application permanently stores all records. That means that you can view and print a result report at any time.

Note: The source system for all Mayo Clinic Laborator test results is our LIS, not the MayoACCESS application. Per our record retention policy, Mayo Clinic Laboratories retains all test requisitions for 25 years and retains all patient test results indefinitely.

Tips and Best Practices

The following topics provide tips for using the MayoACCESS application.

Adding a Desktop Shortcut to Mayo Clinic Laboratories

For quick access to the Mayo Clinic Laboratories website, you can add a shortcut to your computer desktop. To add a shortcut, follow these steps:

Note: These instructions are for Microsoft Windows 10 and Internet Explorer 11. The steps for other versions of Windows or Internet Explorer might be different.

1. Open Internet Explorer and enter the following uniform resource locator (URL) in the address bar:

   http://mayocliniclabs.com

2. On the **File** menu, click **Send** > **Shortcut to Desktop**.

   A shortcut to Mayo Clinic Laboratories is added to your computer desktop.

Adding a Desktop Shortcut to the MayoACCESS Application

To add a shortcut to the MayoACCESS application, follow these steps:

Note: These instructions are for Microsoft Windows 10 and Internet Explorer 11. The steps for other versions of Windows or of Internet Explorer, or for other operating systems might be different.

1. Open Internet Explorer and enter either of the following URLs in the address bar:

   - **Test Site:** https://test.mmlaccess.com

     Note: To avoid inadvertently ordering tests from the MayoACCESS test site, do not add a shortcut to the test site on the processing computers in your laboratories.

   - **Production Site:** https://mmlaccess.com

2. On the **File** menu, click **Send** > **Shortcut to Desktop**.

   A shortcut to the MayoACCESS application is added to your computer desktop.

Adding Mayo Clinic Laboratories and the MayoACCESS Application as Trusted Websites

To ensure correct operation, add Mayo Clinic Laboratories and the MayoACCESS application to your Internet Explorer as trusted sites by following these steps:

Note: These instructions are for Internet Explorer 11. The steps for other versions of Internet Explorer might be different.

1. Open Internet Explorer.
2. On the **Tools** menu, click **Internet options.**
3. In the Internet Options dialog box, click the **Security** tab.

4. On the Security page, click the **Trusted sites** icon.
5. Click **Sites**.
6. In the Trusted sites dialog box, enter each of the following URLs, and then click **Add** to add the website to the list of trusted sites:
   - Mayo Clinic Laboratories

     http://mayocliniclabs.com
   - MayoACCESS production site

     https://mmlaccess.com
   - MayoACCESS test site

     https://test.mmlaccess.com
7. Clear the Require server verification (https:) for all sites in this zone check box.
8. Click **Close** to close the Trusted sites dialog box.
9. Click **OK** to close the Internet Options dialog box.

Troubleshooting

The following topics provide information that can help you address problems with using the MayoACCESS application.

MayoACCESS Does Not Open Correctly

If the MayoACCESS application does not open correctly, it might be necessary to disable popup blockers on your computer. To disable popup blockers, follow these steps:

Note: These instructions are for Internet Explorer 11. The steps for other versions of Internet Explorer might be different.

1. Open Internet Explorer.
2. On the **Tools** menu, click **Internet options.**
3. In the Internet Options dialog box, click the **Privacy** tab.
4. On the Privacy page, click **Settings**.
5. In the Pop-up Blocker Settings dialog box, enter each of the following URLs, and then click **Add** to add the website to the list of allowed websites:
   - MayoACCESS production site

     https://mmlaccess.com
   - MayoACCESS test site

     https://test.mmlaccess.com
6. Click **Close** to close the Pop-up Blocker Settings dialog box**.**
7. Click **OK** to close the Internet Options dialog box.

Extended Frameset and Patient Quick Links Are Not Visible

If you cannot see the extended frameset and Patient Quick links, you might need to change the resolution of your display. To change the resolution of your display, follow these steps:

Note: These instructions are for Microsoft Windows 10. The steps for other versions of Windows or other operating systems might be different.

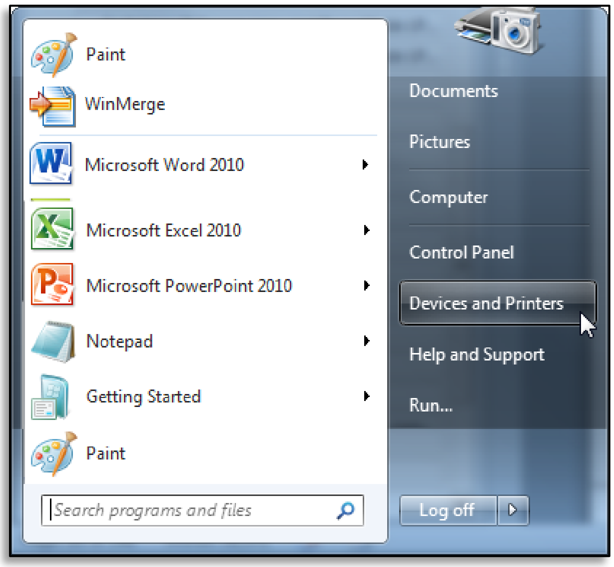
1. In Microsoft Windows, click **Start**, and then click **Control Panel**.
2. In the Control Panel window, click the **Display** link.
3. Click the Adjust resolution link.
4. Adjust the resolution to 800x600 pixels, or higher.
5. Click **OK**.
6. Close the Control Panel dialog box.

Specimen Labels Are Not Printing on the Label Printer

If your specimen labels are not printing on your label printer, follow these steps to verify that the label printer is correctly named:

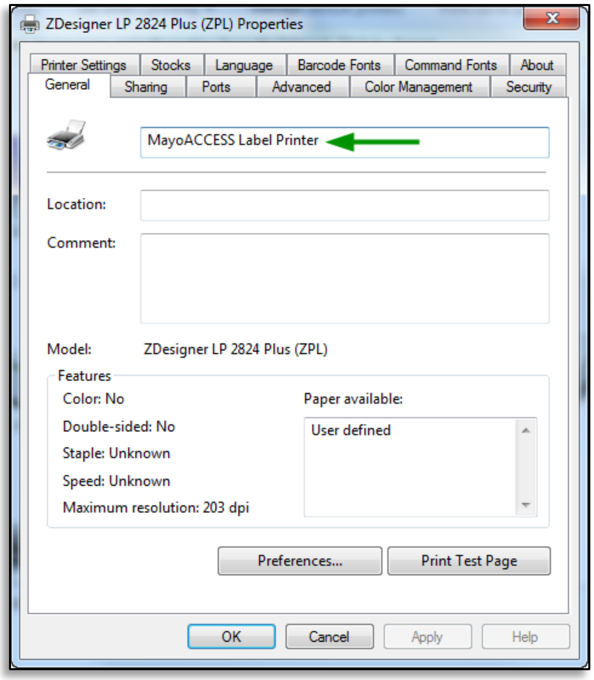
Note: These instructions are for Microsoft Windows 10. The steps for other versions of Windows or other operating systems might be different.

1. In Microsoft Windows, click **Start,** and then click **Devices and Printers**.



2. In the Devices and Printers window, right-click the label printer and click **Printer Properties**.

3. On the General page of the Properties dialog box, verify that the label printer is named **MayoACCESS Label Printer**.



4. Click **OK** to apply these settings.

Result Reports Print on Multiple Pages

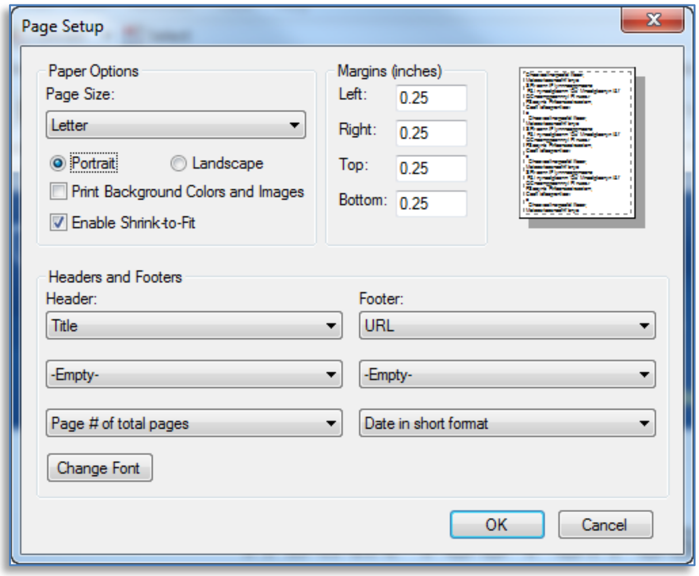
If the result reports are printing on multiple pages instead of on a single page, it may be a result of an incorrect margin setting.

To modify the margin settings, follow these steps:

Note: These instructions are for Internet Explorer 11. The steps for other versions of Internet Explorer might be different.

1. Open Internet Explorer.
2. On the **File** menu, click **Page Setup.**

3. Set the margins to 0.25 inches on all sides.



4. Click **OK**.

Glossary

alias. Another name for a test. For example, Cat Dander is an alias for the CAT test ID.

batch. A set of orders that have been grouped for shipment to Mayo Clinic Laboratories.

batch processing. Combining orders into a batch to send to Mayo Clinic Laboratories.

batch set. The batches that contain an order. For example, if an order contains tests that require specimens to be stored at different temperatures, the orders are grouped by temperature into one batch for each temperature. These batches are called a batch set.

custom profile. A set of tests that can be ordered with a single test code, instead of ordering multiple individual tests. This function is useful when you regularly order the same set of tests and is available only for manual test orders. The batch sheet shows the component tests, not the custom profile.

electronic system (ES). The MayoACCESS view of your Laboratory Information System (LIS).

InfoLink. A MayoACCESS module that enables you to receive notification and to view issues that are generated manually or automatically or are generated as a result of a system event.

Laboratory Information System (LIS). The interface that your laboratory uses to order tests and view results. This interface interacts with the MayoACCESS application.

location. A specific area within a facility or site that shares a patient database with other locations in the site. For example, a Pathology department might be a location within a larger site. A location is similar to a subaccount.

Missing Information Report. A report that shows the orders with information that is needed to process the specimens. You can print this form, answer the questions and fax the completed form to Mayo Clinic Laboratories after the specimens have been shipped.

report search. A search that enables the user to view and print test results.

security group. The security level or role that is assigned to a user. The security group determines the MayoACCESS functions that the user can access.

site. A facility that shares the same patient database across multiple subaccounts or locations. A site is similar to a main account.

test code. The alphanumeric code assigned to the test.

test ID. The alphanumeric code that is used to order a test.

test name. The name of the test. For example, Northeast Regional Allergen Profile is the test name for the NEREG test ID.

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