

POLICY & PROCEDURE



TITLE: Tracking Lab Tests				
Scope/Purpose: To provide a consistent, orderly process for the ordering and tracking of lab tests ordered by agency healthcare providers.				
Division/Department: All HealthPoint Clinics			Policy/Procedure #:	
Original Date: 6/19/06			<input type="checkbox"/> New <input checked="" type="checkbox"/> Replacement for: Test Tracking 7.6.11	
Date Reviewed:	Date Revised:	Implementation:	CPIC Approved:	Board Approved:
	09/22/2015	10/13/2015	10/13/2015	
Responsible Party: Operations Officer ; Director of Nursing; Director of Compliance/QA				

DEFINITIONS:

N/A

POLICY:

Accurate diagnosis of clinical conditions and efficient treatment requires appropriate tracking of medical necessary labs and timely follow up on results.

PROCEDURE:

1. HealthPoint’s electronic health record (EHR) system has bi-directional interfaces with reference laboratories - LabCorp and St. Joseph. All lab orders are sent to the laboratories electronically and results are returned to the agency electronically.
2. Providers order and receive results via the electronic health record system and are trained on the steps of this component of treating patients including:
 - a. Ordering labs
 - b. Electronically submitting orders or faxing or printing orders if necessary
 - c. Reviewing results by either the lab panel or scanned reports
 - d. Forwarding orders to clinical staff based on the results
 - e. Monitoring the outstanding lab report status to ensure the timely receipt of all ordered tests
 - f. Retrieving results of other providers in the case of colleague absence
3. Abnormal Lab Results (Refer to #4 for “High Risk Abnormal Results Requiring Extended Testing or Follow-up)
 - a. Receiving abnormal send-out lab results through the electronic interface
 - i. Critical labs are called to either the ordering provider or medical director per reference laboratory protocol.

- **Subject** – What/why the *Action* was created. Example: “*Abnormal Pap – Notification*”. Though free text can be used in this section, it is strongly suggested to **use the drop-down options** and select the pre-loaded text. These pre-loaded texts are searchable.
 - **Action Type** – What is going on with the *Action* or at what step in the follow up. Multiple actions are available in the drop down. Typical actions used for the abnormal test tracking may include:
 - 1st letter sent
 - 2nd letter sent
 - 3rd letter sent (Certified)
 - Appointment Pending Pt has made appointment to see requested provider
 - Pt notifies of results Pt has returned to clinic and received results. Action should then marked as “completed” and closed out
 - Lost to Follow-up Pt has not responded to any letters or phone calls. Action should now be marked as “completed” and closed out.
 - **Status** – defines the stage of completion. Examples: “*in progress*” or “*completed*”
 - **Notes:** Regarding the narrative of what is being done, please note this information in NOT part of the patient’s medical record. Any letters sent or phone calls made regarding the action should also be documented via a telephone encounter. To add the contents of an *Action* to the patient’s medical record, highlight the notes section, copy and paste into a new Tel encounter. Please make sure it is labeled with what is being done in the “Reason” section of the Tel encounter.
- c. On the date the action is due it will be seen in the “T” jelly bean of the person assigned to the action. After the designated task is performed the Action Type can then be moved to the next step in the process and a new date for completion entered. (See Attachment: Sample Action Process). This process is followed until the final outcome is achieved and the *Action* closed as “Completed”.
- d. *Actions* can be viewed under the DRTLTA tab. When in the progress notes, clicking on the listed *Action* in the DRTLTA tab will cause the Action to open. Note: Though *Actions* are listed in the DRTLTA tab from the HUB, the actions cannot be opened from this tab. All actions can be opened from the *New Action* button. (See Attachment: Accessing Actions- screen shots)
- e. Completion of *Actions* may be monitored by going into “Review Actions”. (Refer to attachment: *Monitoring Action Status*). Outstanding *Actions* can be

filtered by provider, person assigned the Jelly Bean, or by clinic and sorted by the “subject”. This provides a tool for monitoring completion of the actions as well as to identify actions that must be reassigned in the event of staff leaving or being reassigned other duties.

5. Normal Lab Results

- a. For the communication of normal lab results:
 - i. Patients will be informed at the time of their blood draw that, in addition to results being reviewed at their next appointment, they can expect one of the following:
 - 1. direct communication via a phone call regarding their results
 - 2. a letter will be sent to them once the results are received indicating the results are normal – this usually will occur within 7-10 days
 - 3. the results viewed on the Patient Portal once received and reviewed by the provider (Patient must be enrolled in Patient Portal for this access. Not all results will post to Portal and may require review as noted in #1 & #2)

6. Tracking Overdue Lab Results **

- a. All labs have been set with an overdue date of 5, 10, 15, or 20 days. Once the lab has been ordered, HealthPoint has 5, 10, 15 or 20 days (depending on the lab) to receive the results. If the result is not received within that timeframe, then the lab is automatically flagged with RED lettering to indicate that the lab is overdue.
 - i. The overdue lab will be in the provider’s L Jellybean under the “Outstanding” tab.
 - ii. On a regular basis, a designated staff member will go to the provider’s “Outstanding” tab and locate all overdue labs. The staff member will follow up with the lab or patient to determine why the results are overdue.
 - 1. In the Lab Results window, the staff member will put **‘Overdue Results’** in the “Reason” box along with **‘see telephone encounter’** in the “Notes” section.
 - 2. The staff member then will generate a telephone encounter to document any contact with the patient/lab company regarding the overdue results.
 - a. In the telephone encounter in the “Reason” box, the staff member will put **‘Tracking Overdue Lab Results’**.
 - b. All contact regarding the overdue lab should be documented in the “Message” tab under “Add Action Taken”.
 - 3. All follow up actions should take place within 10 days of the results being flagged as overdue. This means that most lab orders should be closed out within 15 days of when the lab was originally ordered, and the telephone encounter should be addressed.

**This tracking process within eCW does not apply to HealthPoint Madisonville until such time as specimen collection is performed by the clinic.

RELATED POLICY:

Imaging Test Tracking P&P

REFERENCES:

REQUIRED BY:

2014 PCMH Standard 5: Test Tracking and Follow-Up
Element A: Care Coordination and Care Transitions
Factors: 1,3,5

ATTACHMENTS/ENCLOSURES:

Tracking Via Actions – Tracking Flowchart
Accessing Actions
Creating & Using Actions
Monitoring Actions
Sample Actions – Abnormal Test Tracking

POLICY/PROCEDURE TRACKING FORM

TITLE: Tracking Lab Tests				
Scope/Purpose: To provide a consistent, orderly process for the ordering and tracking of lab tests ordered by agency healthcare providers.				
Division/Department: All Clinics			Policy/Procedure #:	
Original Date:			<input type="checkbox"/> New <input checked="" type="checkbox"/> Replacement for:	
Date Reviewed:	Date Revised:	Implementation:	CPIC Approved:	Board Approved:
	09/22/2015	10/13/2015	10/13/2015	
Date of Revision		Description of Changes		
09/22/2015		Expansion of tracking process; “Action” process implemented for tracking required follow up testing.		