

Procedure for Ordering Samples in HHS Lab Portal

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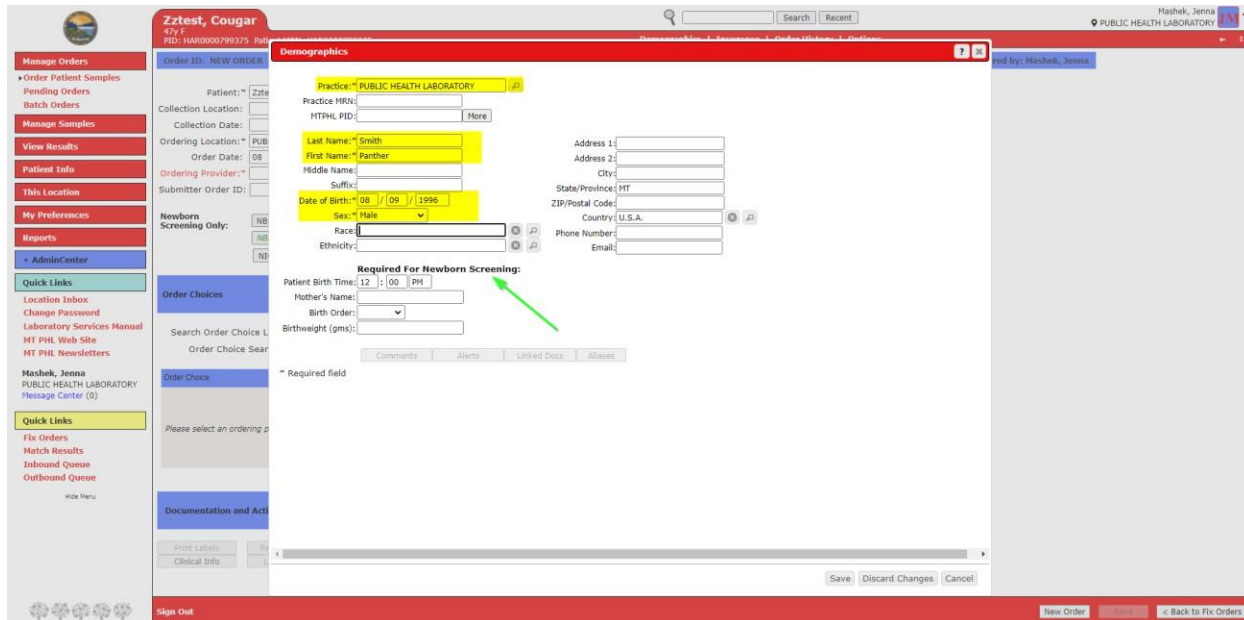
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Ordering Samples

- ❖ Sign in with your username and password.
- ❖ Under “manage orders” click “Order patient samples”
 - Start typing the patient’s name. (Last name first)
 - If the patient is in the system under your practice, the patient will pop up under a drop-down menu.
 - Select the correct patient from this menu. Confirm the patient’s information is correct after selecting the patient.



- If the patient is not in the system click “new patient” at the bottom of the drop-down menu.
 - ◆ The “new patient” button will bring up the demographics page to fill out.
 - ◆ Type your MR for the patient in the “Practice MRN” Field.
 - ◆ The required fields are “Last Name”, “First Name”, “Date of Birth”, and “Sex”.
 - ◆ Please provide all other available information such as race, ethnicity, and address.
 - ◆ Additional fields are required for newborn screening.



Newborn Screening addition information

- For Newborns:
 - ◆ If the baby has yet to be named, the first name should be entered as “Boy/Girl mother’s name”. (ex. BoyJane)
 - ◆ In the case of multiple babies (twins) please add the birth order letter in front of the first name (ex. ABoyJane). Only use these letters for multiple births, not single births.
- Fill out “Patient Birth Time”, “Mother’s name”, “Birth Order”, and “Birthweight”.
 - ◆ “Mother’s name” should be entered as Last name, First name.

Required For Newborn Screening:

Patient Birth Time: :

Mother's Name:

Birth Order: ▼

Birthweight (gms):

* Required field

- Once all the patient information has been entered click “Save”. This will save the patient in the system for future use.
 - ◆ Once you click “Save” it will close the demographics page and return to the order screen.

Sample Information

- Fill out the “Collection Date” and the “Ordering Provider.”
 - If the provider you would like to use is not on the list please use “..Laboratory.” AFTER saving the order, a message will pop up saying “You have selected ..Laboratory as a provider. A ticket has automatically been opened for you. Please put the Providers name (last name, first name) and NPI number in the description of the open ticket. Click view ticket to add this information into the ticket. Please select the Reason in the ticket as "Correction-Pending Order". (see p. 18 for detailed instructions).
 - The Submitter ID field is an optional field for your sample/accessioning number.

The screenshot shows the 'Zztst22, Patient' order entry interface. The 'Collection Date' is set to 08/03/2021 at 03:45 PM. The 'Ordering Provider' is set to '..Laboratory'. A green arrow points to the 'Newborn Screening Only' section, which includes buttons for 'NBS Form No:', 'NBS Repeat:', and 'NICU'. The 'Order Choices' section is also visible, with a search bar and a table for selecting order choices.

For Newborn Screening having the correct collection date and time is very important.

Please ensure the correct collection time and date are entered on the order screen for newborn screening orders.

- For newborn orders, “NBS Form No”, “NBS Repeat”, and “NICU:” are required. Click on these buttons to enter this information.

The close-up shows the 'Submitter Order ID' field and the 'Newborn Screening Only' section with three buttons: 'NBS Form No:', 'NBS Repeat:', and 'NICU'. Below this is the 'Order Choices' section.

- “NBS From No:” is the serial number from the NBS bloodspot collection card.
- “NBS Repeat:” is yes or no.
 - If the sample is a repeat this should be marked as a yes.
- “NICU” is yes or no.
 - If the baby is in the NICU this should be marked as a yes.

Searching for tests

- ❖ Once all the required information is entered, the system will then allow typing in the “Order Choice Search”. Start typing in the order choice Search field or select a list to filter by. (See the document [How to Search for Tests \(mt.gov\)](#) for more detailed instructions)

Order Choices

Type in the field below to search for a test

Order Choice Search:

or search by selecting a list below:

Filter by List:

Order Choice Order Choice Received Date/Time

- This will then open a smaller screen where you can choose from the order choices available to your practice.
- Select the test/test(s) you would like for this patient sample. Press “Add Selected Items”.

Zzttest22, Patient
RD: C20211771885 Patient MRN: 123456

Order ID: NEW ORDER

Patient: Zzttest22, Patient
Collection Location: ..Test Location
Collection Date: 06 / 04 / 2021
Ordering Location: ..Test Location
Order Date: 06 / 04 / 2021
Ordering Provider: ..Laboratory
Submitter Order ID: 5635465

Newborn Screening Only:
NBS Form No.:
NBS Repeat:
NICU

Order Choices

Search Order Choice List: All Lists
Order Choice Search:

Order Choice Search

Order Choice Name: Ova

Search All Order Choices
 Search Order Choice List: Orderable Tests
 Search Profiles

Show 20 entries Showing 1 to 1 of 1 entries

Select	Abbreviation	Name(s)	Collection Information	Storage Temperature	CPT Codes
<input type="checkbox"/>	Ova	Ova & Parasite Exam: Amebiasis Detection, Giardia Detection, Parasite Detection, Strongyloides Detection	Stool in Formalin & PVA Fixatives	Ambient Temperature	87177, 87209

Show 20 entries Showing 1 to 1 of 1 entries

Selected Items

Select	Abbreviation	Name(s)	Collection Information	Storage Temperature	CPT Codes	Count	Remove
<input checked="" type="checkbox"/>	Enteric P	Enteric Panel	Stool in Cary-Blair Transport	Refrigerated	87045, 87046A, 87046B, 87449	1	

Add Selected Items Cancel

- If the test that is to be performed on this sample is not on the choice list, please choose “Misc. test 2” and use the Additional Order Information button to tell us what you are trying to order.
- If tests are being requested on two different specimen/sample types, please put these on separate orders. Make sure to provide ALL requisitions for any testing that needs to be done with the sample.
- If you need to enter Medicaid billing information, see p. 13 for instructions.
- If you need to provide any additional information about the order for our staff, use the “Additional Order Information” button below the order choice list. This information will appear at the top of the requisition.
- Once the order choice/choices are selected and added to the patient’s order, click “Save.”
 - This will bring up the clinical questions for you to answer.
 - Depending on the specimen source, you may need to enter an additional note for this question. For example, if you choose “Lesion Swab,” please indicate the site of the lesion in the additional note. Only type something in this field if it pertains to the specimen itself. A source like “Nasopharyngeal Swab” needs no further information.
 - If the Date of Onset question appears:
 - Select Onset or Exposure if there is an exposure or symptom onset date; and type the date in the Additional Note field.
 - For serology testing, use “serology screen only” if there is no exposure/onset date.
 - For covid testing select the appropriate choice: screen, surveillance, onset, exposure, etc.
 - After answering all clinical information questions, click Save. *(see p. 6 for exceptions that may occur at this point.*

The screenshot displays a 'Clinical Information' dialog box overlaid on a patient order form. The dialog box is titled 'Clinical Information' and has three tabs: 'Order Choices', 'Clinical Info', and 'Response'. The 'Clinical Info' tab is active, showing a table with columns for 'Order Choices', 'Clinical Info', and 'Response'. The first row shows 'SARS-CoV-2' with 'Specimen Source' set to 'Nasal Swab'. Below this, there is an 'Additional Note' field. The 'SARS-CoV-2 Date of Onset' section has several radio button options: 'Exposure', 'Onset' (which is selected), 'Screen', 'Surveillance', 'Acute Serology Specimen', 'Convalescent Serology Specimen', 'Serology Screen Only', 'Convalescent Only Serology Specimen', 'Acute Only Serology Specimen', 'Post Convalescent Serology Specimen', 'Baseline Serology Screen', 'Not Applicable', and 'Not Given'. The 'Additional Note' field for this section contains the date '8/10/2021'. The 'SARS-CoV-2 COVID Info' section has radio button options: 'Initial Test', 'Healthcare' (selected), 'Hospitalized', 'ICU', 'Symptomatic' (selected), 'Resident', and 'Contact'. At the bottom of the dialog are 'Save' and 'Cancel' buttons. The background form shows patient information: Patient: Zztest, Cougar; Collection Location: PUBLIC HEALTH LABORATORY; Order Date: 08/13/2021; and a table of order choices with 'SARS Coronavirus_2' selected.

Printing Requisitions

- If there are no exceptions, the requisition will be displayed on the screen and will need to be printed and sent with each sample. Make sure to provide **ALL** requisitions for any testing that needs to be done with the sample. **Please do not print requisitions for newborn screening orders. (The paper filled out on the blood spot card is the requisition.)**

Print Report

External Report

1 of 1

MTPHL ON LINE REQUISITION

MT Public Health Laboratory 1400 Broadway Helena, MT 59601
CLIA#27D0652531

Order Information:

Collection Location: ..Test Location
Order ID: 9823-on-21201 Date Printed: 07/20/2021 9:22AM
Ordering Provider: ..Laboratory
Ordered Date: 07/20/2021 9:21AM
Order Comments:

Patient Information:

Name: Zztest22, Patient
Patient ID: C20211771885
MRN: 123456
DOB: 06/01/1995
Age / Gender: 26y M
Address: 123 Main St, Helena, MT 59601
Patient Comments:

Order Choices for: Harvest

SID: C21201737 Collected: 07/20/2021 9:21AM

Table 1: Order Details

Name	Priority	Tube/Container	ICD Codes
Influenza A and B Virus Detection (PCR)	R	(1) Universal Transport Media	
REFRIGERATED			
Billing: Client Bill			

Clinical Info:

Order Choices	Questions	Answers
Inf A-B PCR	Specimen Source:	Nasopharyngeal

OK

- Once all the requisitions have been printed, you are done placing orders for the day, and you have all the orders that will be sent to the state lab together, a manifest must be created to be sent with the samples to MT State Public Health Laboratory. See p. 7 for how to create a manifest.
- Exceptions that may occur when clicking “Save”:

Newborn Screening Error Message

- ❖ If required information is missing on an order, a message will pop up.
 - Click okay.
 - Once the missing information is input then click “save”.

The screenshot shows a web application interface for a newborn screening order. At the top, there is a red header with the text "1889 Patient MRN: C20212081889". Below this is a blue header with "W ORDER". The main form contains several input fields: "Patient Name" (Smith, Bobcat), "Test Location" (..Test Location), "Date" (07/27/2021), "Time" (11:17 AM), "City", "State" (MT), and "ZIP/Postal Code". There are also fields for "NBS Form No." and "NBS Repeat:". A "Save Patient" button is visible at the bottom right. A modal dialog box is open in the center, titled "10.195.52.78:443 says", with the message: "1. Order-level required information is missing for Newborn Screening. Enter missing information at the bottom of the screen (NBS Form No., Repeat status).". A green arrow points to the "OK" button in the dialog box.

- The clinical questions will appear. Click “save” again.
- ❖ if there are multiple tests on the same order but they are for different sections in our lab, a screen will pop up with a warning that a split order choice rule was applied. Press “continue save”.
 - The system will split the orders, and separate requisitions will be displayed for each in sequence. Print each requisition and include all of them with the sample.

The screenshot shows a web application interface for a requisition. At the top, there is a red header with the text "MTPHL ON LINE REQUISITION". Below this is a red banner with the text "A Split Order Rule has created an additional order". Below the banner is a white box with the text "A Split Order Rule has created an additional order." and a "Continue Save" button. A green arrow points to the "Continue Save" button. At the bottom, there is a patient information section with the text: "Name: Zztest22, Patient", "Patient ID: C20211771885", and "MRN: 123456".

Creating a Manifest

- Under manage samples click “create manifest”
 - ◆ This will bring up all the orders that have been created from your location that have not been placed on a manifest yet.
 - Other criteria can be selected if a sample is not found on this list, including samples that are on other manifest or from past collection dates that are on other manifests.
 - If you have access to multiple locations, print a separate manifest for each location. Make sure the location is listed in the Collection Location field (it should not say “All”). This ensures the location prints on the manifest.

- Please create separate manifests for Newborn Screening samples vs all other samples.
 - When creating a manifest for Newborn Screening, look at the Order Choice column, and select all Newborn orders by clicking in the select box. Click “Create Manifest”.

Sample Collection Location	Select	Order ID	Patient	Sample ID	Collection Date/Time	Order Date/Time	Order Choices	Host Codes	Proposed Collection Location
...Test Location	<input type="checkbox"/>	9841-on-21229	Zttest_Patient5	C21229750	08/17/2021 2:35PM	08/17/2021 2:41PM	OandP	OandP	...Test Location
...Test Location	<input type="checkbox"/>	9846-on-21229	Zttest_Patient5	MIC2100008	08/17/2021 2:35PM	08/17/2021 2:41PM	EntericP	EntericP	...Test Location
...Test Location	<input checked="" type="checkbox"/>	9842-on-21235	Zttest_Patient6	NBS21000146	08/21/2021 6:00PM	08/23/2021 11:12AM	NBS CORE 3	NBS Core 3	...Test Location
...Test Location	<input checked="" type="checkbox"/>	9843-on-21235	Zttest_Patient10	NBS21000147	08/22/2021 7:30AM	08/23/2021 11:23AM	NBS CORE 3	NBS Core 3	...Test Location
...Test Location	<input type="checkbox"/>	9844-on-21235	Zttest_Patient5	MIC2100009	08/23/2021 2:12PM	08/23/2021 2:12PM	EntericP	EntericP	...Test Location
...Test Location	<input type="checkbox"/>	9845-on-21235	Zttest22_Patient	C21235752	08/23/2021 2:13PM	08/23/2021 2:16PM	SARS-CoV-2	2019nCoV	...Test Location

- This will bring up a manifest just for Newborn Screening. Print and send this manifest in the envelope with the dried blood spot cards.

Print Manifest

Manifest ID: 21235140401

1 of 1

MONTANA PUBLIC HEALTH LABORATORY
1400 BROADWAY HELENA, MT 59604-4369
1-800-821-7284

MANIFEST

Collection Location: **..Test Location**
Manifest ID: 21235140401
Date: 08/23/2021 2:04PM

Name: **Zztest, Patient6** Order ID: 9842-on-21235
DOB / Gender: 08/20/2021 / F Patient ID: C20212351893

Order Choice Name	Tube(s)/Container(s)	Collected
Newborn Screening Panel	(1) Dried Blood Spot Card	08/21/2021 6:00PM

Name: **Zztest, Patient10** Order ID: 9843-on-21235
DOB / Gender: 08/21/2021 / M Patient ID: C20212351894

Order Choice Name	Tube(s)/Container(s)	Collected
Newborn Screening Panel	(1) Dried Blood Spot Card	08/22/2021 7:30AM

Sign Out Review Manifest < Back to Create Manifest

- Then select all other orders that will be sent to the MT State Public Health Laboratory. If this is all the orders on this page the word “select” can be pressed to select them all.
- Once all samples (other than Newborn Screening) are selected click the “create manifest” button. This will open a screen from where the manifest can be printed.
- Print this manifest and send it with the samples to the MT State Public Health Laboratory.

Print Manifest

Manifest ID: 21202092901

1 of 1

MONTANA PUBLIC HEALTH LABORATORY
1400 BROADWAY HELENA, MT 59604-4369
1-800-821-7284

MANIFEST

Collection Location: **PUBLIC HEALTH LABORATORY**
Manifest ID: 21202092901
Date: 07/21/2021 9:21AM

Name: **Zztest22, Patient** Order ID: 9823-on-21201
DOB / Gender: 06/01/1995 / M Patient ID: C20211771885

Order Choice Name	Tube(s)/Container(s)	Collected
Influenza A and B Virus Detection (PCR)	(1) Universal Transport Media	07/20/2021 9:21AM

Name: **Zztest22, Patient** Order ID: 9822-on-21201
DOB / Gender: 06/01/1995 / M Patient ID: C20211771885

Order Choice Name	Tube(s)/Container(s)	Collected
Enteric Panel	(1) Cary-Bair Transport	07/20/2021 9:21AM

Name: **Zztest133, Patient** Order ID: 9824-on-21201
DOB / Gender: 03/15/1986 / F Patient ID: C20211811886

Order Choice Name	Tube(s)/Container(s)	Collected
Newborn Screening Panel	(1) Dried Blood Spot Card	07/20/2021 1:46PM

Sign Out Review Manifest < Back to Create Manifest

Canceling and Adding on tests

Canceling Tests

- ❖ **ANY TIME YOU CANCEL, ADD OR RE-ACTIVATE A TEST FOR A SAMPLE THAT HAS ALREADY BEEN RECEIVED BY OUR LAB YOU MUST CALL or FAX TO LET US KNOW**
 - You can cancel an order or a test up until the point that it has been completed.
 - To cancel an order or test, open the order (see the procedure for how to search for an order).
 - Once you've opened the order, you can cancel the entire order by clicking the "Cancel Order" button.
 - You can cancel an individual test on an order by clicking on the X in the cancel column next to the order you want to cancel.

Zztest22, Patient 26y M
PID: C20211771885 Patient MRN: 123456 Demographics | Insurance | Order History | Options

Order ID: 9832-on-21217 Status: NO RESULTS Entered by

Patient: * Zztest22, Patient Patient MRN: 123456
Collection Location: ..Test Location Date of Birth: * 06 / 01 / 1995
Collection Date: * 08 / 05 / 2021 03 : 49 PM Now Clear Sex: * Male
Ordering Location: * ..Test Location Race: [] [X] [M]
Order Date: 08 / 05 / 2021 03 : 49 PM Now Ethnicity: [] [X] [M]
Ordering Provider: * ..Test User, Laboratory Address: 123 Main St
Submitter Order ID: [] City: HELENA
State: MT
Newborn Screening Only: NBS Form No: [] ZIP/Postal Code: 59601
NBS Repeat: [] Save Patient
NICU []

Order Choices

Search Order Choice List: All Lists
Order Choice Search: [] Diagnosis required for Medicaid
Diagnoses: [] Search Summary

Order Choice	ICD Codes	Sample ID	Priority	Billing	Cancel
Lyme Disease Total Ab (EIA)	None selected	C21217743	Routine	Client Bill	[X] [M]

 To cancel test

Documentation and Actions

Print Labels Requisition(s) Lab Report Comments
Clinical Info Linked Docs Cancel Order Collect Samples


To cancel order

- ❖ Note the status of the order at the top. You can cancel a test or order up to the point that it has been completed. Once the status is Complete, the cancel buttons will be greyed out.
- ❖ When you click cancel, you will be asked to enter a reason. Pick a reason from the drop down list. You can enter additional info in the box.

Cancel Order

Order ID: 9832-on-21217
 Patient Name: Zztest22, Patient
 Patient ID: C20211771885
 Sample ID(s): C21217743
 Cancelled By: ..Test User, Laboratory
 Cancelled Date:

Enter the reason for cancelling this order: *

Reason*

Preview

Reason	Active	Level
Canceled by ordering provider	Yes	System
Duplicate order	Yes	System
Ordered in error	Yes	System
Other (specify in add'l info)	Yes	System
Sample never collected	Yes	System
Test patient order	Yes	System
Unsatisfactory sample	Yes	System

Additional

...

❖ Once you've entered a reason, click Proceed with Cancellation at the bottom of the screen.

It will take you back to the order screen. If you've canceled a test, you need to click save. If you've canceled the order, the status will have changed to Canceled.

❖ Canceled tests appear with lines through them in OEL.

Zztest22, Patient
 26y M
 PID: C20211771885 Patient MRN: 123456

Demographics | Insurance | Order History | Options

Order History Filter [\(show filter\)](#)

Cumulative

..Test Practice: Zztest22, Patient / Patient ID: C20211771885 / MRN: 123456

View Archive

Total rows selected: 0

Show 20 entries Showing 1 to 12 of 12 entries

Order ID	Sample ID List	Order Choice Abbreviations	Ordering Location	Proposed Collection	Sample Collection Date	Order Date	Ordering Provider	Status
9822-on-21201	MIC21000007	EntericP (R), PDF (R)	..Test Location	07/20/2021 9:21AM	07/20/2021	08/06/2021 2:15PM	..Laboratory	Complete
9832-on-21217	C21217743	Lyme (EIA) (R)	..Test Location	08/05/2021 3:49PM	08/05/2021	08/05/2021 3:49PM	..Test User, Laboratory	Cancelled (more)
9827-on-21216	C21216738	OandP (R)	..Test Location	08/04/2021 8:04AM	08/04/2021	08/04/2021 8:20AM	..Laboratory	Accession Pending, No Results
9823-on-21201	C21201737	Inf A-B PCR (R)	..Test Location	07/20/2021 9:21AM	07/20/2021	07/20/2021 9:21AM	..Laboratory	Accession Pending, No Results
9818-on-21188	C21188733	SARS-CoV-2 (R)	..Test Location	07/07/2021 3:09PM	07/07/2021	07/07/2021 3:10PM	..Test User, Laboratory	Accession Pending, No Results
9817-on-21188	C21188732	CT-GC Combo (Public) (R)	..Test Location	07/07/2021 3:03PM	07/07/2021	07/07/2021 3:04PM	..Test User, Laboratory	Accession Pending, No Results
9816-on-21188	SER21000004	Syphilis IgG (R)	..Test Location	07/07/2021 3:03PM	07/07/2021	07/07/2021 3:04PM	..Test User, Laboratory	Accession Pending, No Results
9812-on-21181	MIC21000006	EntericP (R)	..Test Location	06/30/2021 3:28PM	06/30/2021	06/30/2021 3:32PM	..Test User, Laboratory	Accession Pending, No Results
9813-on-21181	SER21000003	Syphilis IgG (R)	..Test Location	06/30/2021 3:28PM	06/30/2021	06/30/2021 3:31PM	..Test User, Laboratory	Accession Pending, No Results
9807-on-21181	C21181731	EntericP (R)	..Test Location	06/30/2021 2:55PM	06/30/2021	06/30/2021 2:56PM	..Test User, Laboratory	Accession Pending, No Results
9805-on-21179	C21179729	SARS-COV-2 IgG (R)	..Test Location	06/28/2021 1:08PM	06/28/2021	06/28/2021 1:08PM	..Test User, Laboratory	Accession Pending, No Results
9804-on-21177	C21177728	SARS-CoV-2 (Panther) (R)	..Test Location	06/26/2021 10:18AM	06/26/2021	06/26/2021 10:24AM	..Test User, Laboratory	Accession Pending, No Results

Show 20 entries Showing 1 to 12 of 12 entries

- ❖ You may re-activate a canceled test (not an order), by clicking on the check mark next to a canceled test.

Zztest33, Patient
 35y F
 PID: C20211811886 Patient MRN: 1234566

Demographics | Insurance | Order History | Options

Order ID: 9806-on-21181 Status: NO RESULTS Entered by:

Patient: * Zztest33, Patient Patient MRN: 1234566

Collection Location: ..Test Location Date of Birth: * 03 / 15 / 1986

Collection Date: * 06 / 30 / 2021 02 : 46 PM Now Clear Sex: * Female

Ordering Location: * ..Test Location Race: _____

Order Date: 06 / 30 / 2021 02 : 50 PM Now Ethnicity: _____

Ordering Provider: * ..Test User, Laboratory Address: 1234 South 6th St. W

Submitter Order ID: _____ City: Great Falls

Newborn Screening Only: NBS Form No: _____ State: MT

NBS Repeat: _____ ZIP/Postal Code: _____

NICU Save Patient

Order Choices

Search Order Choice List: All Lists

Order Choice Search: _____ Diagnoses: _____ Search Summary

Order Choice	ICD Codes	Sample ID	Priority	Billing	Cancel
C. trachomatis (Aotima)	None selected	C21181730	Routine	Client Bill	<input checked="" type="checkbox"/>
Syphilis Serology, Qualitative	None selected	C21181730	Routine	Client Bill	<input checked="" type="checkbox"/> View Cancellation Information/Reactivate

Documentation and Actions

Print Labels Requisition(s) Lab Report Comments

Clinical Info Linked Docs Cancel Order Collect Samples

- ❖ Select a reason for re-activation (use other and explain in the box.) Then click Proceed with Re-activation.

Update Reason Proceed With Reactivation Don't Reactivate

Add-on Testing

- You may add-on a test to an existing order if it is not yet complete. If the order is complete you will need to create another order. To add a test, look up the order, and once in the order add order choices and save the same way that you would if you were entering a new order.

❖ ANY TIME YOU CANCEL, ADD OR RE-ACTIVATE A TEST FOR A SAMPLE THAT HAS ALREADY BEEN RECEIVED BY OUR LAB YOU MUST CALL or FAX TO LET US KNOW

- Samples that have not yet been received have a status of "Accession Pending".

Zztest22, Patient
26y M
PID: C20211771885 Patient MRN: 123456

Demographics | Insurance | Order History | Options

Order History Filter [\(show filter\)](#)

..Test Practice: Zztest22, Patient / Patient ID: C20211771885 / MRN: 123456

Total rows selected: 0

Showing 1 to 12 of 12 entries

Order ID	Sample ID List	Order Choice Abbreviations	Ordering Location	Proposed Collection	Sample Collection Date	Order Date	Ordering Provider	Status
9822-on-21201	MIC21000007	EntericP (R), PDF (R)	..Test Location	07/20/2021 9:21AM	07/20/2021	08/06/2021 2:15PM	..Laboratory	Complete
9832-on-21217	C21217743	Lyme (EIA) (R)	..Test Location	08/05/2021 3:49PM	08/05/2021	08/05/2021 3:49PM	..Test User, Laboratory	Cancelled (more)
9827-on-21216	C21216738	OandP (R)	..Test Location	08/04/2021 8:04AM	08/04/2021	08/04/2021 8:20AM	..Laboratory	Accession Pending, No Results
9823-on-21201	C21201737	Inf A-B PCR (R)	..Test Location	07/20/2021 9:21AM	07/20/2021	07/20/2021 9:21AM	..Laboratory	No Results
9818-on-21188	C21188733	SARS-CoV-2 (R)	..Test Location	07/07/2021 3:09PM	07/07/2021	07/07/2021 3:10PM	..Test User, Laboratory	Accession Pending, No Results
9817-on-21188	C21188732	CT-GC Combo (Public) (R)	..Test Location	07/07/2021 3:03PM	07/07/2021	07/07/2021 3:04PM	..Test User, Laboratory	Accession Pending, No Results
9816-on-21188	SER21000004	Syphilis IgG (R)	..Test Location	07/07/2021 3:03PM	07/07/2021	07/07/2021 3:04PM	..Test User, Laboratory	Accession Pending, No Results
9812-on-21181	MIC21000006	EntericP (R)	..Test Location	06/30/2021 3:28PM	06/30/2021	06/30/2021 3:32PM	..Test User, Laboratory	Accession Pending, No Results
9813-on-21181	SER21000003	Syphilis IgG (R)	..Test Location	06/30/2021 3:28PM	06/30/2021	06/30/2021 3:31PM	..Test User, Laboratory	Accession Pending, No Results
9807-on-21181	C21181731	EntericP (R)	..Test Location	06/30/2021 2:55PM	06/30/2021	06/30/2021 2:56PM	..Test User, Laboratory	Accession Pending, No Results
9805-on-21179	C21179729	SARS-COV-2 IgG (R)	..Test Location	06/28/2021 1:08PM	06/28/2021	06/28/2021 1:08PM	..Test User, Laboratory	Accession Pending, No Results
9804-on-21177	C21177728	SARS-CoV-2 (Panther) (R)	..Test Location	06/26/2021 10:18AM	06/26/2021	06/26/2021 10:24AM	..Test User, Laboratory	Accession Pending, No Results

Showing 1 to 12 of 12 entries

- To fax, just print the requisition from the system and make a note as to what you are doing, then fax to us at 406-444-5527
- To print a requisition, from the order history screen - right click on the order and select requisition, or from within the order, click on the requisition button.

Entering Medicaid Information

- From the Order Patient Samples Screen, Click Insurance in the top menu bar.
- On the Insurance screen, if Medicaid is not already listed, Click “Add an Insurance Plan”

The screenshot shows the 'Patient Insurance' section of a software interface. At the top, there's a red header with 'Zztest33, Patient' and a search bar. Below that, a blue bar contains 'Demographics | Insurance | Order History | Options'. The main area is divided into several sections: 'Patient Information' (Name: Zztest33, Patient; MRN: 1234566), 'Collection Location' (Date: 08/05/2021, Time: 1:38 PM), 'Ordering Location' (Date: 08/05/2021), and 'Newborn Screening Only' (NBS Form No., NBS Repeat, NICU). A red banner reads 'Patient Insurance' with a help icon. Below it, a message says 'Choose existing insurance information, or create new.' There are tabs for 'Insurance Summary', 'Primary', 'Secondary', 'Tertiary', and 'Guarantor'. A message states 'No insurance information exists for this patient.' Below this, there are buttons for 'Select this insurance for ZZTEST33, Patient', 'Select Different Insurance', and 'Add an Insurance Plan'. On the left, there's a sidebar with 'Order Choices' and 'Documentation and Actions' sections. At the bottom, there are 'Print Labels', 'Requisition(s)', 'Save', 'Discard Changes', and 'Cancel' buttons.

- It will take you to the Primary Insurance Tab. Start typing “Medicaid” in the Insurance Plan field.
- The Medicaid Plan should then appear in the list. Click the Medicaid plan.

This screenshot shows the 'Primary' insurance tab. At the top, there's a red header with 'Patient Insurance' and a help icon. Below it, a message says 'Search for and select a primary plan.' There are tabs for 'Insurance Summary', 'Primary', 'Secondary', 'Tertiary', and 'Guarantor'. The 'Primary' tab is active. Below the tabs, there are input fields for 'Insurance Company' and 'Insurance Plan' (containing 'me'). A 'Copy from Previous' button is also present. A search dropdown is open, showing 'MEDI' as a suggestion. Below the search, there's a table with columns: 'Company¹', 'Plan²', 'Phone', 'Contact', 'Contact Phone', and 'Address'. The 'Medicaid' plan is listed under 'Plan²' with the address '00000000'. At the bottom, there are 'Save', 'Discard Changes', and 'Cancel' buttons.

- ❖ Click Select when the Medicaid plan information pops up.

Patient Insurance Details
✕

Insurance Company Information
Change Log

Company Name*

Company ID Insurance Type

Company ID Type

Insurance Plan Information
Change Log

Plan Name* Address Type

Plan ID Address 1

Phone Number* Address 2

Contact Last Name ZIP/Postal Code

Contact First Name City

Contact Middle Name State/Region/Province

Contact Phone Number Country

County Code

- ❖ Enter the policy number in the Policy field (this field is required). Then click Save.

Patient Insurance
? ✕

Edit *primary plan* information.

Insurance Summary*
Primary*
Secondary
Tertiary
Guarantor

Insurance Company Copy from Previous

Insurance Plan

Insured Information

Policy*

Group

Group #

Relationship to Insured

First Name

Middle Name

Last Name

Subscriber ID

Sex

Date of Birth / /

Insurance Effective Date / /

Employer Information

Employer

Employer ID

Employer Plan Code

Employer Phone #

Employer Address 1

Employer Address 2

Employer City

Employer State

Employer ZIP Code

Employer Country

Phone # 1

Phone # 2

Address 1

Address 2

City

State

ZIP Code

Country

Employment Status

Insured SSN

Insurance Expiration Date / /

- ❖ Once all the rest of the order information is filled in, you must enter at least one diagnosis code for Medicaid billing.

Zztest33, Patient 🔍

35y F
PID: C20211811886 Patient MRN: 1234566 Demographics | Insurance |

Order ID: NEW ORDER Status: NEW ORDER

Patient:* Zztest33, Patient

Collection Location: ..Test Location

Collection Date:* 08 / 06 / 2021 01 : 47 PM Now Clear

Ordering Location:* ..Test Location

Order Date: 08 / 06 / 2021 01 : 38 PM Now

Ordering Provider:* ..Test User, Laboratory

Submitter Order ID:

Patient MRN: 1234566

Date of Birth:* 03 / 15 / 1986

Sex:* Female

Race:

Ethnicity:

Address: 1234 South 6th St. W

City: Great Falls

State: MT

ZIP/Postal Code:

Save Patient

Newborn Screening Only:

NBS Form No:

NBS Repeat:

NICU

Order Choices

Search Order Choice List: All Lists

Order Choice Search:

Diagnosis required for Medicaid

Diagnoses: Search Summary

Order Choice	ICD Codes	Sample ID	Priority	Billing	Cancel
Ova & Parasite Exam	None selected	T.B.D.	Routine	Client Bill	✕ 🔊

Documentation and Actions

Print Labels

Requisition(s)

Lab Report

Comments

Clinical Info

Linked Docs

Cancel Order

Collect Samples

- ❖ You can type the code directly in the field or use the search button to find a code.

Diagnosis Search

Search

Search Patient's Previous User's Frequent

Select	Code	Description
<input type="checkbox"/>	A01.00	Typhoid fever, unspecified
<input type="checkbox"/>	A01.4	Paratyphoid fever, unspecified
<input type="checkbox"/>	A25.9	Rat-bite fever, unspecified
<input type="checkbox"/>	A68.9	Relapsing fever, unspecified
<input type="checkbox"/>	A75.9	Typhus fever, unspecified
<input type="checkbox"/>	A77.9	Spotted fever, unspecified
<input type="checkbox"/>	A92.9	Mosquito-borne viral fever, unspecified
<input type="checkbox"/>	A95.9	Yellow fever, unspecified
<input type="checkbox"/>	A96.9	Arenaviral hemorrhagic fever, unspecified
<input checked="" type="checkbox"/>	R50.9	Fever, unspecified

Use the search feature to find a code. Click the box next to it and then click "Add All Selected Items"

Show Selected Items
Add All Selected Items
Cancel

- ❖ Once you've entered diagnosis codes, they will appear under the Order Choice(s) you entered on the order.

Zztest33, Patient 🔍
 35y F
 PID: C20211811886 Patient MRN: 1234566 Demographics | Insurance | O

Order ID: NEW ORDER Status: NEW ORDER

Patient:* <input type="text" value="Zztest33, Patient"/>	Patient MRN: <input type="text" value="1234566"/>
Collection Location: <input type="text" value="..Test Location"/>	Date of Birth:* <input type="text" value="03 / 15 / 1986"/>
Collection Date:* <input type="text" value="08 / 06 / 2021"/> <input type="text" value="01"/> : <input type="text" value="47"/> PM <input type="button" value="Now"/> <input type="button" value="Clear"/>	Sex:* <input type="text" value="Female"/>
Ordering Location: <input type="text" value="..Test Location"/>	Race: <input type="text"/> <input type="button" value="x"/> <input type="button" value="p"/>
Order Date: <input type="text" value="08 / 06 / 2021"/> <input type="text" value="01"/> : <input type="text" value="38"/> PM <input type="button" value="Now"/>	Ethnicity: <input type="text"/> <input type="button" value="x"/> <input type="button" value="p"/>
Ordering Provider:* <input type="text" value="..Test User, Laboratory"/>	Address: <input type="text" value="1234 South 6th St. W"/>
Submitter Order ID: <input type="text"/>	City: <input type="text" value="Great Falls"/>
	State: <input type="text" value="MT"/>
	ZIP/Postal Code: <input type="text"/>
	<input type="button" value="Save Patient"/>

Newborn Screening Only:

Order Choices

Search Order Choice List:
 Order Choice Search: Diagnoses:

Order Choice	ICD Codes	Sample ID	Priority	Billing	Cancel
Ova & Parasite Exam	R50.9	T.B.D.	Routine	Client Bill	<input type="button" value="x"/> <input type="button" value="p"/>


Documentation and Actions

- ❖ **NEW – Enter Patient Class**
 - Select Inpatient or Outpatient from the drop-down menu (default is Outpatient)

Order Choices

Order Choice Search: *Type in the field below to search for a test*
 or search by selecting a list below:
 Filter by List:

Required for Medicaid

Diagnoses:
 Patient Class* 

Order Choice	ICD Codes	Sample ID	Order Choice Received Date/Tim
			Outpatient
			Inpatient

New Provider

- After saving the order, a message with pop up at the top of the page if you used “..laboratory” as the ordering provider. This message says:
 - “You have selected ..Laboratory as a provider. A ticket has automatically been opened for you. Please put the Providers name (last name, first name) and NPI number in the description of the open ticket. Click view ticket to add this information into the ticket.”
 - Click ok on the message. Follow the message instructions after printing the requisition.

The screenshot displays a web interface with a central pop-up message. The pop-up has a white background and a blue border, with the title "labportal-test.hhs.mt.gov says". The message text reads: "1. You have selected ..Laboratory as a provider. A ticket has automatically been opened for you. Please put the Providers name (last name, first name) and NPI number in the description of the open ticket. Click view ticket to add this information into the ticket." A blue "OK" button is located at the bottom right of the pop-up. In the background, a form is visible with fields for "Name", "Address", "City", "State" (set to "MT"), and "ZIP/Postal Code". Below the form are buttons for "Save Patient", "Create Ticket", and "View Tickets". The interface also features a red header bar with "Search" and "Recent" buttons, and a blue footer bar with a large "C" logo.

- The “view ticket” button will become available after saving the order and highlighted green. Click the “view ticket” button.

Order ID: 2024030001 Status: NO RESULTS Entered by: ..Tes

A signed physician's order is required for all laboratory testing and must be provided to MTPHL upon request as necessary for Medicaid billing or audit purposes.

Patient: * Zztest, Jenna Patient MRN: 363598

Collection Location: ..Test Location Date of Birth: * 01 / 18 / 2024

Collection Date: * 01 / 30 / 2024 12 : 33 PM Sex: * Female

Ordering Location: * ..Test Location Race: Ethnicity: Address: City: State: MT

Order Date: 01 / 30 / 2024 12 : 36 PM ZIP/Postal Code: Save Patient

Ordering Provider: * ..Laboratory Submitter SID: Create Ticket **View Tickets** ←

Newborn Screening Only: NBS Form No NBS Repeat NICU

- A client Services Tickets screen will open.
 - Click “View details” next to the right side of the ticket with the summary “..Laboratory used as Provider”

PID: C202215782735 Patient MRN: 363598 Demographics | Insurance | Order History | Options

Client Services Tickets

Showing Tickets for 2024030001 (Current Order) Hide closed Tickets

Show 15 entries Showing 1 to 1 of 1 entries

ID	Client	Summary	Status	Priority	Reason	Open Date	Assignee	Contact	Edit
Case-00001197	..Test Location	..Laboratory used as Provider (20240300001)	New	Routine		01/30/2024 12:33PM			View Details →

Show 15 entries Showing 1 to 1 of 1 entries

Close

- In the “Description (No PHI)” field please put the ordering provider’s name (last name, first name) and their NPI number. Then click “Save”. This will take you back to the “Client Services Tickets” screen. Close this screen to continue.
- **This ticket will be linked to this order, and we will work this ticket as soon as possible to get the doctor in our system.**

Edit Ticket
✕

Item ID:

Client*: ⊗ 👤

Reason*: ⊗ 👤

Summary*: ⋮

Description (No PHI): ⋮

Order ID: 20240300001

Doe, John
NPI:85968588

Status: ⊗ 👤

Priority: ⊗ 👤

Create New

Notes
Links
➕ Add

Entered By	Entered Date (MST)	Modified Date (MST)	Note Text	Edit
No matching records found				