Ordering outpatient labs and procedures in APeX requires the ordering provider to define status, priority and class. Most of the time the **correct** ordering status and class for your department defaults into your order. However there are times you need to change this information. This quick reference guide helps define these terms for you.

**Order Entry**

Order Entry is an efficient tool also used to place orders. Located in the Activity Tabs (far left) it allows users to complete several tasks in “one screen” including *Ordering, Adding Dx, Adding to the Problem List and the Level of Service (LOS)*.

1. **CC Results** - allows the person placing the orders to alert the system to send a copy of the results to listed recipients who receive the results in the Results folder of their InBasket. **This MUST be done BEFORE SIGNING THE ORDERS!!**

2. **Open Orders** - displays a list of patients Future/Standing orders.
   
   **Note:** Before ordering check here to prevent placing duplicate orders for patients. This is also where labs are released, discontinued or extended.

3. **Sign Orders** - allows the end-user to sign the orders and remain in the Order Entry screen.

   **SignNav** - (Click the drop-down arrow next to SignOrders) allows the end-user to sign all orders and the system will automatically take you back to
**CC Results** - Allows the user to alert the system to send a carbon copy of results to UCSF recipients. Outside providers cannot be added to the recipient list.

**Open Orders** – Allow end-users to see *Future* and *Standing* orders for patients. Reviewing these orders prior to ordering prevents placing duplicate orders. In this screen you can do any of the following tasks:
1. **S column/Status** - Indicates if an order is Standing (●) or Future (■).

2. **Release** - Allows end-users to Release orders to be performed. Typically, only those individuals who will act on the orders should release them.

   **Note:** Please be careful when clicking the Release button for a standing order because each time you click the Release an order is removed for completion. Once all Standing/Future orders are released if additional labs need to be performed, they must be re-ordered. Notice the Remaining Column which indicates the remaining count of the order (6/6...11/12, etc.)

3. **Standing Interval** - Indicates how often an order should be performed. Standing orders may be performed any time after the expected interval or up to one week earlier than the expected interval.

**Additional Open Order Options**

**Extend** - Allows Clinicians to extend orders after the expiration date.

**Note:** When writing a standing order, consider writing the order for up to 100 occurrences so that the order may be extended beyond the expiration dated and still have occurrences left during the extended time.
Discontinue – Allows Clinicians to discontinue orders that will not be performed.

Note: If discontinuing a duplicate order written by another provider please remember before signing your orders to send a carbon copy “CC” to the provider on the new order to ensure they receive the result(s) in their InBasket.

Lab STATUS: Knowing the difference between Future, Standing and Normal Orders

Future Orders

1. Status - Default is Future
   a. Enter Expected Date (Note: Check the Approx Box to allow the patient a range of time. The Expires date defaults based on the order (5 months or 1 year).
2. Class - Indicate where the lab will be performed UCSF or Non-UCSF.
1. Status “FUTURE”

Labs performed today or anytime in the future, outside the clinic the orders were placed in, should be marked as “FUTURE”. It is extremely helpful if the EXPECTED date is entered in the order, this helps ease confusion in the lab when patients have multiple labs ordered. Orders without an expected date are drawn at first presentation to the lab. The Approx box allows patients to be drawn 7 days prior to the expected date.

Expected Date

- **No Expected Date** - lab will draw on the same day as the order or up until the expiration date.
- **Entering an Expected** date allows the lab to draw an order on the specified date up until the expiration date.
- **Selecting the Approx box** allows the lab to draw an order up to 1 week prior to the expected date.

2. Class:

**UCSF Lab Collect** – labs drawn at a UCSF Lab

**Non-UCSF Lab Collect** – labs drawn at external/outside locations. Lab requisitions will automatically print upon signing of the order. These orders are not visible to the UCSF Clinical lab.

*Hint:* When the status is future, you will see a

**Standing Orders**

*After visit Procedures (1 Order)*

<table>
<thead>
<tr>
<th>CBC</th>
<th>UCSF Lab Collect, Routine, Expires, 10/22/2013 Auto-release, Count 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status:</td>
<td>1</td>
</tr>
<tr>
<td>Priority:</td>
<td>Standing</td>
</tr>
<tr>
<td>Class:</td>
<td>Expires: 10/22/2013</td>
</tr>
<tr>
<td>Container details:</td>
<td>Lavender top</td>
</tr>
</tbody>
</table>

1. Change Status to “Standing”
   a. Enter Expiration
   b. Release: Auto or Manual
   c. Enter Interval
   d. Enter Count

2. Indicate where the lab will be performed UCSF or Non-UCSF
1. Status = “STANDING”

Repeat labs that will be performed over a period of time. The following must be entered:

   a. **Expiration Date** *(Standing orders are valid for a maximum of 6 months)*

   b. **Release**
      - *Auto* allows the user to choose the Interval from a drop-down list and has no impact on how the system functions. Lab staff still manually release and complete the lab when due.
      - *Manual* allows the user to “Free Text” the interval

   c. **Interval** – how often the order should be performed. The lab is allowed to draw an order up to 1 week prior or after the calculated interval until the expiration date.

   d. **Count** – Number of labs ordered *(ex. 12, 25, or 100 to prevent having to re-order)*

2. **Class:**

   **UCSF Lab Collect** – labs drawn at a UCSF Lab

   **Non-UCSF Lab Collect** – labs drawn at external/outside locations. Lab requisitions will automatically print upon signing of the order. These orders are not visible to the UCSF Clinical lab.

   **Hint:** When the status is standing, you will see a ☑

**Example of a completed Standing order performed at a Non-UCSF Lab:**

![Image of a completed Standing order performed at a Non-UCSF Lab](image)
What does the Lab see?

The lab can only View and Release “Standing” or “Future” tests that are performed at UCSF.

What CAN’T the Lab see?

- Labs placed for External Lab Collect or Clinic Collect are not viewable to Lab phlebotomists.
- Additional tests/instructions placed in the comment field of an order ARE NOT visible to the lab staff.
Normal Orders/Clinic Collect

Please note this is a 2-part process:

PART 1:

1. **Status = “NORMAL”**

   Used for lab specimens collected TODAY in-clinic during the office visit.

   Note: “Clinic Collect” orders are not visible or released from the Open Orders/Order Review section by the phlebotomist. They rely on the printed requisition from the clinic which is printed and attached to the specimen (*after performing part 2*) in the clinic.

2. **Class = CLINIC COLLECT**

   If you work in a department in which most of your lab work is ordered as “Clinic Collect”, the status of normal will automatically default. There is no need for you to change the order.

PART 2:

Visit Orders: **Once labs are signed the Collection information MUST be documented or the order is not released to the lab to perform the test.** This information is found on the Visit Orders report in the Schedule for Nurses. (*Note: Providers who perform collection and documentation must add the Visit Orders report to their schedule.*)
Step 1: From the schedule highlight the patient name and in the Visit Orders Report (bottom of the schedule) Double-click on the link *Perform Clinic Collect*

![Visit Orders](image1)

**Ingrid Ayrshire**

**Orders Needing Specimen Collection**

<table>
<thead>
<tr>
<th>Ordered</th>
<th>CBC - Prio: Routine, Needs to be Collected</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/30/12</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1407</td>
</tr>
</tbody>
</table>

![Task](image2)

Step 2: Enter the *Collection Date, Time* and select *Collection Complete*.

*Note: This documentation releases the test to the lab and prints the requisition to accompany the specimen going to the lab.*

![Please provide the following information:](image3)

**Collections**

![Collection Complete](image4)

**Duplicate Orders:**

APeX has Order Validation warnings that prompt users when ordering duplicates. If another Provider has ordered the same lab tests, click the hyperlink to add yourself (i.e. update recipient list) to the result.

*(Note: Lab/Radiology receives the order in a work queue and releases the order(s) to perform as instructed. If there are several orders for the same test from one or multiple Providers, this may confuse the tech and as a result can delay the process).*
IMPORTANT!!!!!!

Order Validation

The following orders duplicate existing orders from this encounter:
COMPLETE BLOOD COUNT (INCLUDES PLATELET COUNT) [LAB234]

The orders you are now placing are duplicates of the following open orders. Consider releasing an open order instead.
COMPLETE BLOOD COUNT (INCLUDES PLATELET COUNT) [LAB234] is a future order placed by Pat Bismuth, MD on 10/22/12

Do you want to accept these orders anyway?

[Yes] [No]

NO prevents the user from placing a duplicate order.

YES allows the user to place a duplicate order which can confuse the recipient of the order when the patient comes in to have them performed.

Preferred method is to choose CLICK HERE TO UPDATE RECIPIENTS, add yourself to receive results to receive the results in your In Basket (Results folder).
Canceling Orders:

Providers must cancel orders entered in error, if they decide to not have a lab to be performed or if there are duplicates.

1. If still in the encounter in which the orders were done, go to the Meds & Orders section and click the triangle next to the order and the details will expand.

2. Click Cancel and enter a reason for canceling the order and accept.  
   Note: If you notice a duplication when placing orders and decide to cancel order(s) written by another provider, remember to add the provider as a recipient using the CC button so that they receive the test results in their In Basket.

3. If in a future encounter and there is a desire to discontinue a previously signed order, go to order entry and click on Open orders, select the order to be discontinued and click on Discontinue.
   Note: When placing research orders and you find a duplicate, you will want to discontinue the previously signed orders and place new orders remembering to copy the previous ordering provider when placing the new order. This workflow will help insure that the order is billed to the research account, not the patient’s insurance carrier, and that the provider of the original order will get the result in their In Basket.