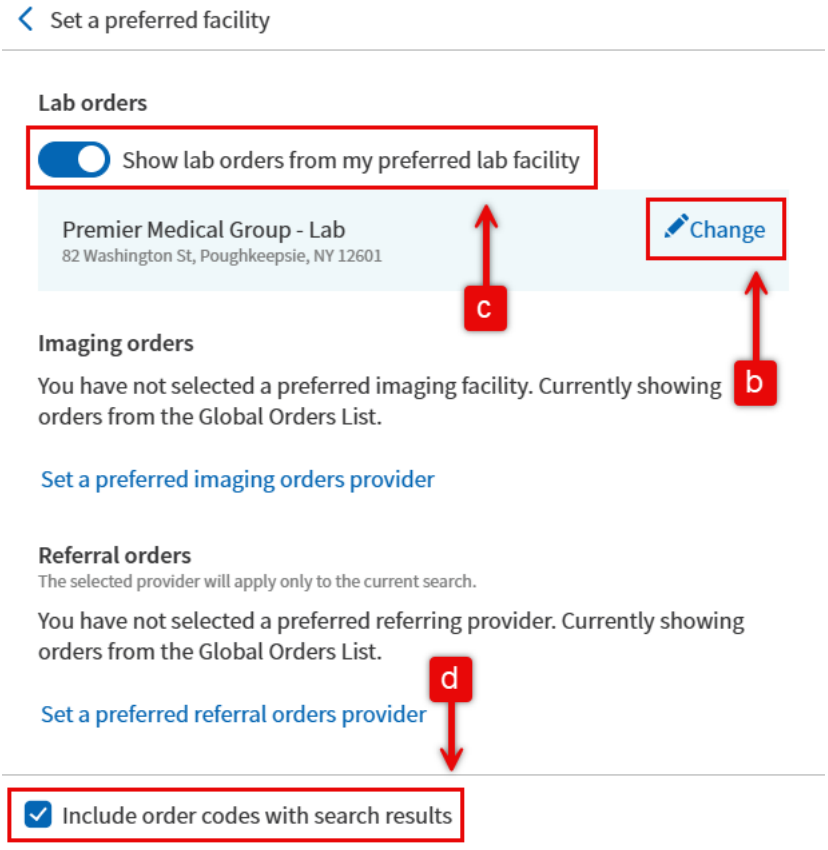
Ordering Labs in Athena

Placing orders in Athena can be done at any time from within the patient's chart by clicking **Create Order Group**. Orders can also be placed in encounters, during either the **Intake** or the **Assessment & Plan (A/P)** section of the Exam.

1. Click **DIAGNOSES & ORDERS**. This will display a window where you can search for diagnoses, orders, educational information, and more. **Always enter your diagnosis first, as this will impact which orders Athena presents to you when you search for them.** Athena will also begin to learn which orders you typically place with each diagnosis code over time. By default, orders are placed with the Preferred Lab facility in the patient's chart, if there is one. Front Desk staff should be updating this field for patients at check-in; clinical staff can also update it during Intake.
    - **a.** Beneath the search box, a message indicates which lab's orders will be displayed in your search results. Depending on the order you're trying to place, you may need to click **Edit Preferences** to change the lab. This allows you to search for and select orders from other lab companies. This is an important step in ensuring the order goes to the correct lab.



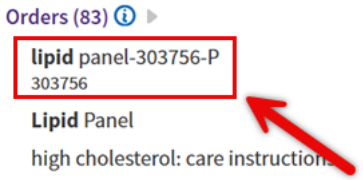
- **b.** When you click Edit Preferences, you can click **Change** to search for a specific lab company. This will change which orders appear in your search results to match the new lab company. There are a few important things to note:



- <u>Labs ordered with Premier must always be sent to **Premier Medical Group – Lab**</u> (as shown on the left). The phlebotomy lab locations should never be selected, or the orders will not be sent out.
- <u>Patients must have their labs drawn by the lab you placed the order with</u>. If Premier draws the patient's blood, the order must be placed with **Premier Medical Group - Lab**. We cannot draw blood at Premier and send the order to an outside lab. If the specimen needs to be sent to an outside lab, Premier's lab will send it out. If you change the lab facility and place the order directly with the outside lab, the patient must go to that outside lab to have their blood drawn. If we do not follow this workflow, the charges will not drop, and the order and specimen will go to different locations.

c. You should not turn off **Show lab orders from my preferred lab facility**. Turning it off will present orders that are not coded or interfaced correctly and will not go out. You would then have to specify within each order which lab company you want the order to go to, creating the possibility of sending a lab order to the wrong company. It will also require you to answer an additional dropdown to select a more specific order code for the lab company you chose. If you select the wrong order code, the results will not flow back into the EMR.

d. At the bottom of the Edit Preferences window, you will also see the option to **Include order codes with search results**; this is a good setting to have turned on as it will help distinguish orders in your search results. In the example to the right, the lipid panel with the order code is the correct lab order; the one below it is an educational handout about lipid panels. You can also search for orders using this order code rather than their name.

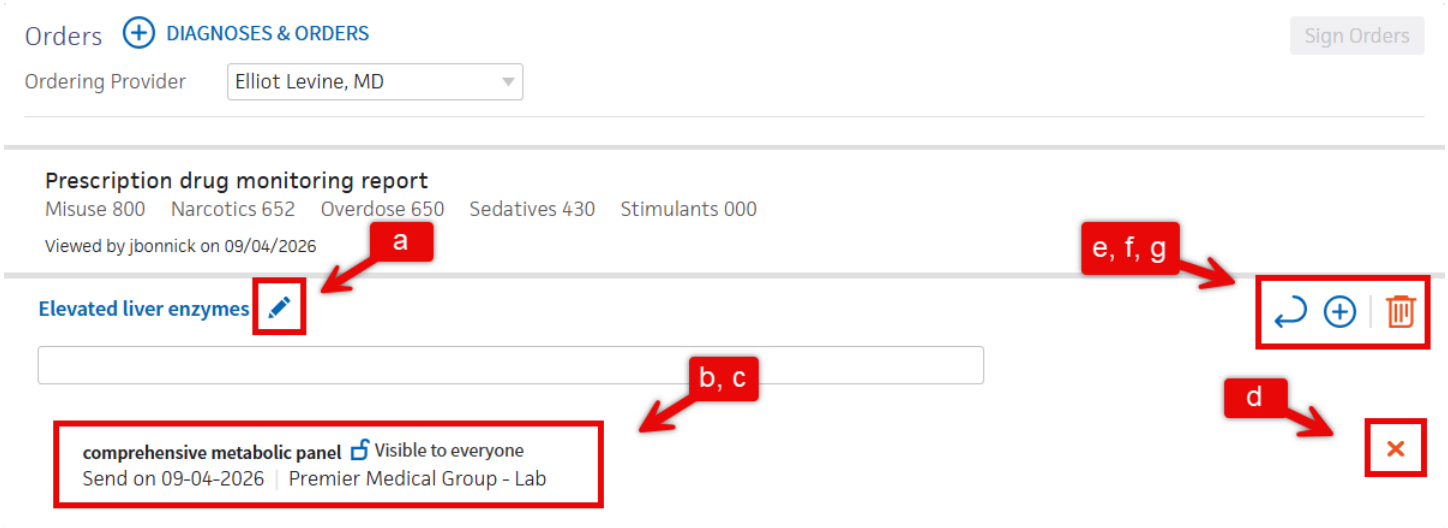


About Order Codes

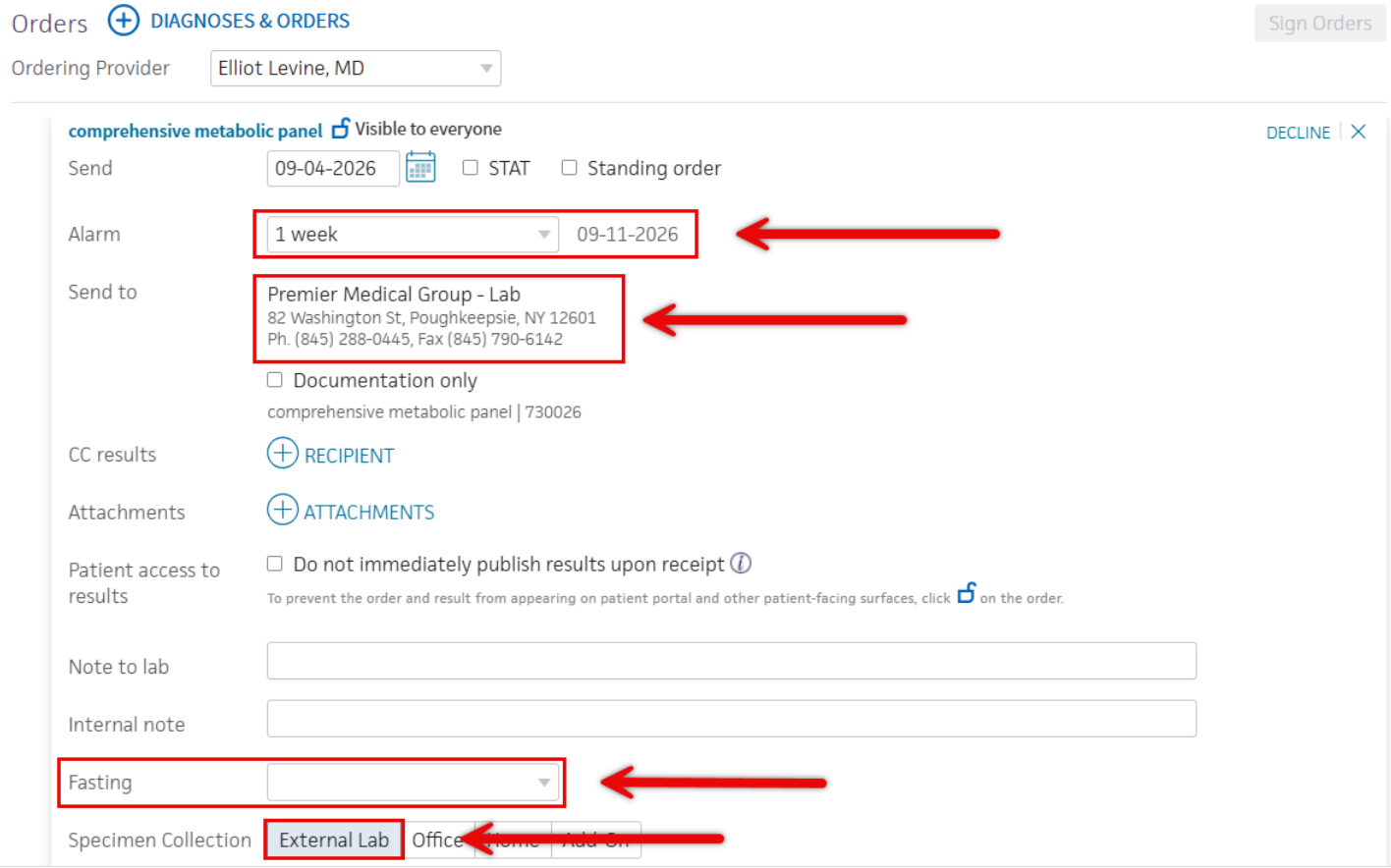
LabCorp order codes always contain 6 numbers, as shown in the lipid panel order above, while Quest order codes contain 4-5 numbers. Order codes for outside reference labs typically begin with OEL.

2. Once you've selected your lab company, search for and add your diagnoses and orders. Diagnoses are displayed on the left side of the window, while orders are displayed on the right. Remember to add your diagnosis first.
   - **a.** Orders can be added from **Order Sets** by clicking them, or by clicking **Preview** to view all orders within the set so you can add the specific orders you want. Order sets are a sure way to send out orders correctly, as they are hardcoded and interfaced appropriately for their respective lab companies.
     - **This means that if you use an order set built for Premier you will not be able to change the lab company, and it will not interface correctly if you attempt to send it to an outside lab.**
   - **b.** **Point of Care Tests** are those you will be performing in office rather than sending out.

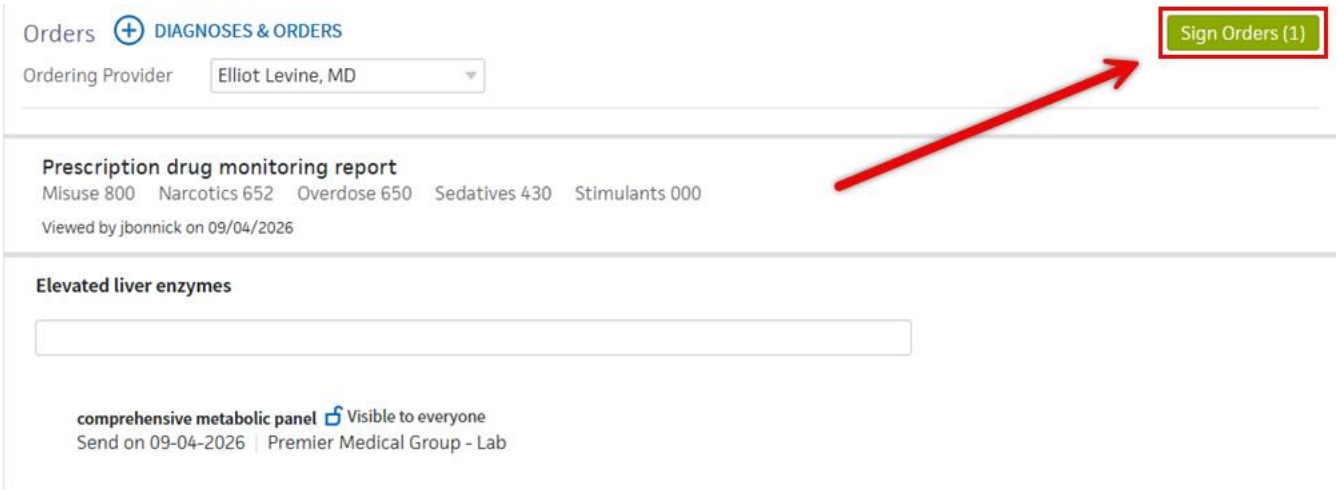
3. After adding your orders and diagnoses, click out of the search window to return to the order group. From here, you can:
   - **a.** Edit any diagnosis code by clicking the pencil icon to its right.
   - **b.** Edit order details by clicking on the order itself.
   - **c.** Click and drag orders from one diagnosis code to another.
   - **d.** Remove an order by clicking the red X to its right.
   - **e.** Add a diagnosis code from the order group to the patient's problem list by clicking the curved arrow to its right.
   - **f.** Add orders to a diagnosis code by clicking the plus + icon to its right.
   - **g.** Remove a diagnosis code by clicking the red trash can to its right. <u>This will also remove all orders associated with the diagnosis code</u>.



4. When you click an order title, it will open the order details. Here you can:
    a. Set the alarm; this will drop the order into your **Need Followup** inbox on the Home Page if no results have come back after the timeframe you've set. If you prefer not to have a default alarm set for your lab orders, you can remove this in your User Preferences. There is a guide on how to do this at the end of this document.
    b. View the Receiver (the lab company the order is being sent to). This will not be editable if you selected a specific lab company when placing your orders, or if you placed your orders through most order sets. If you turned off **Show lab orders from my preferred lab facility**, the lab company may be editable.
    c. Determine whether the order is Fasting or not. Leaving this unanswered will prevent orders from going out.
    d. Set the Specimen Collection. Always select **External Lab** unless the test is a **Point of Care Test**.



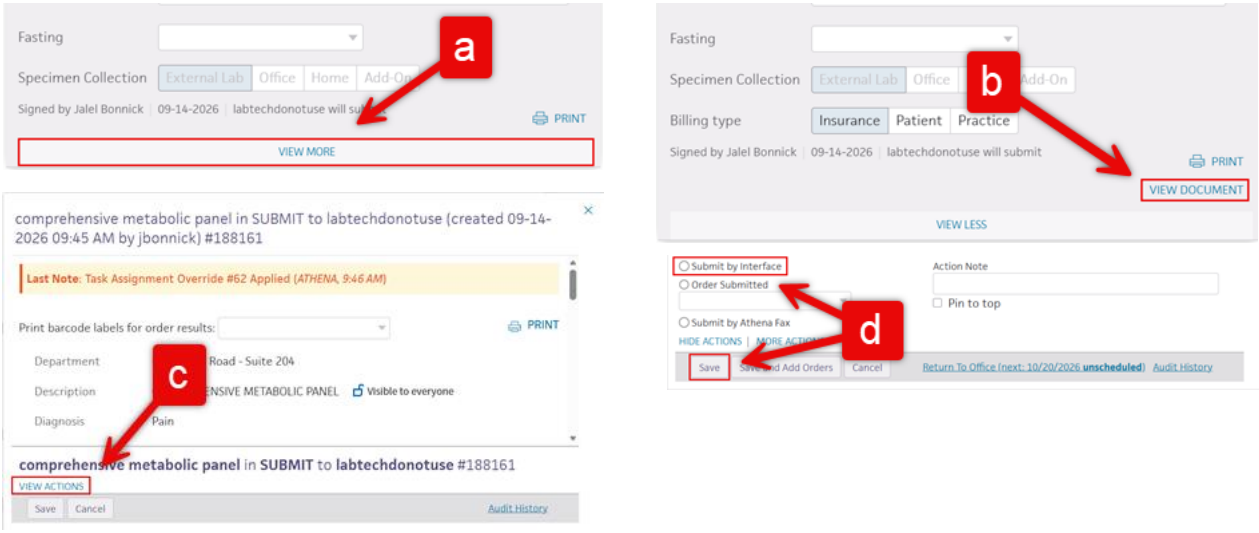
5. After selecting and addressing all your orders, click **Sign Orders** to complete the process. If Sign Orders is not green, it indicates either that there are orders with no diagnosis code, or orders with details that need to be filled out before they can be signed.



Submitting Orders via Interface

Orders placed in Athena do not automatically go out via Interface to outside lab companies; they must be sent out by choosing **Submit via Interface**, or the outside lab will not receive the order. You can do this from the order details immediately after signing the order:

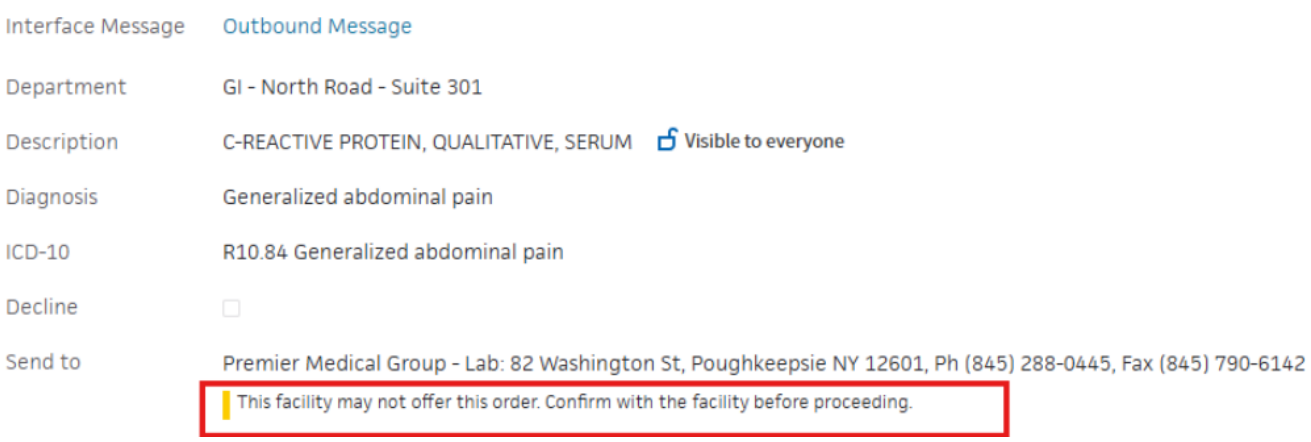
a) Click View More
b) Click View Document
c) Click View Actions
d) Select Submit via Interface, then click Save.



There are different scenarios in which you may need to submit orders this way.

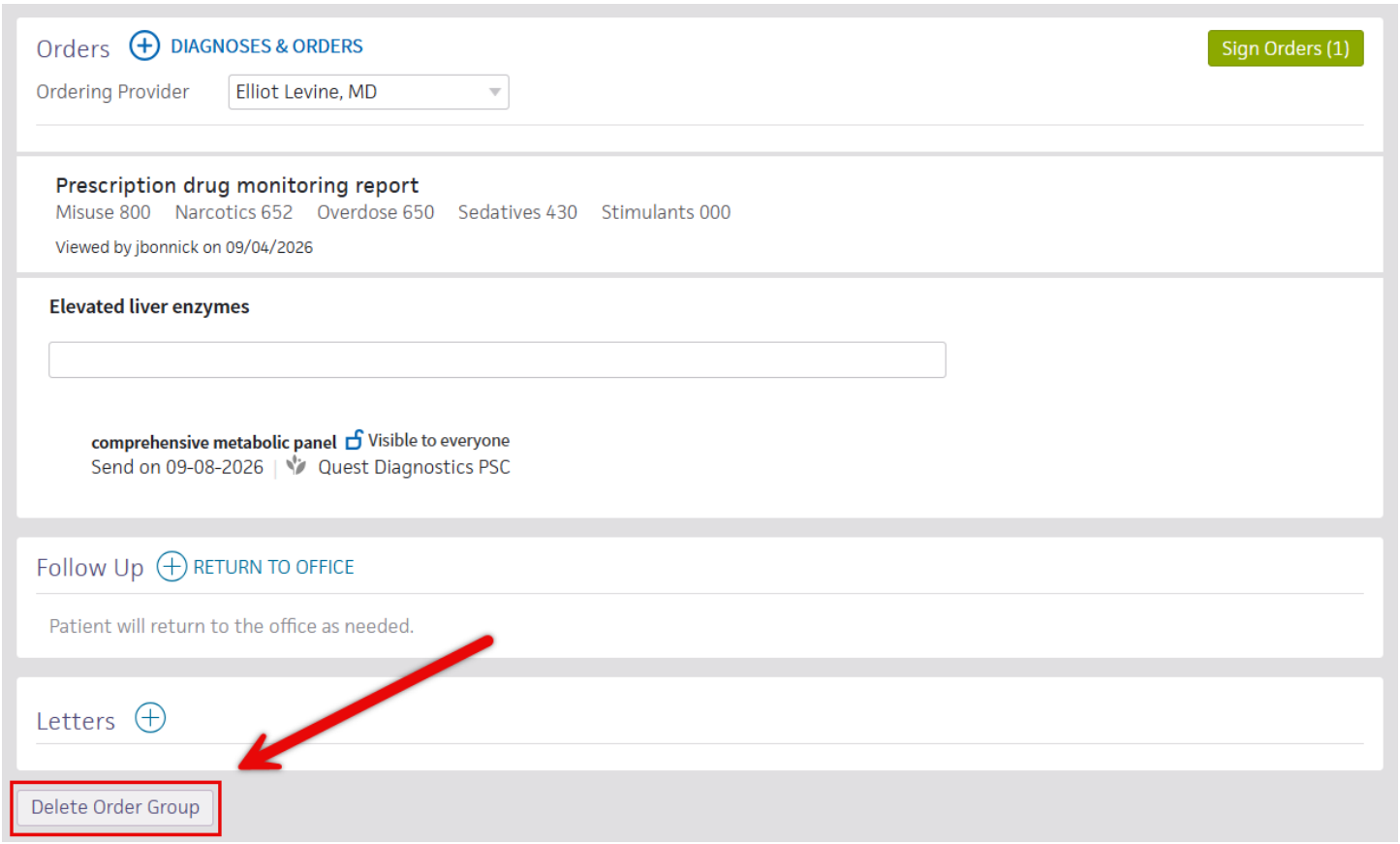
- If the patient is going to an outside lab to have their blood drawn, submit your orders via interface immediately after signing the order. Cologuard and Litholink orders must always be submitted via interface.
- If the patient is having their blood drawn at Premier, do not submit via interface when you place the order. The phlebotomist or MA must submit via interface when they draw the patient's blood, as it will timestamp the collection date and time when submitted in-house.
- If the patient is having their blood drawn at Premier, but the specimen is being sent to an outside lab, do not submit via interface. The lab will do so.

Note that when viewing a signed order, Athena may display an alert that the order may not be offered by the facility it was ordered with, as shown below. If you see this warning, the order has not gone out to the facility selected. You must re-order the test with the correct lab company and delete this order group.



Deleting Order Groups

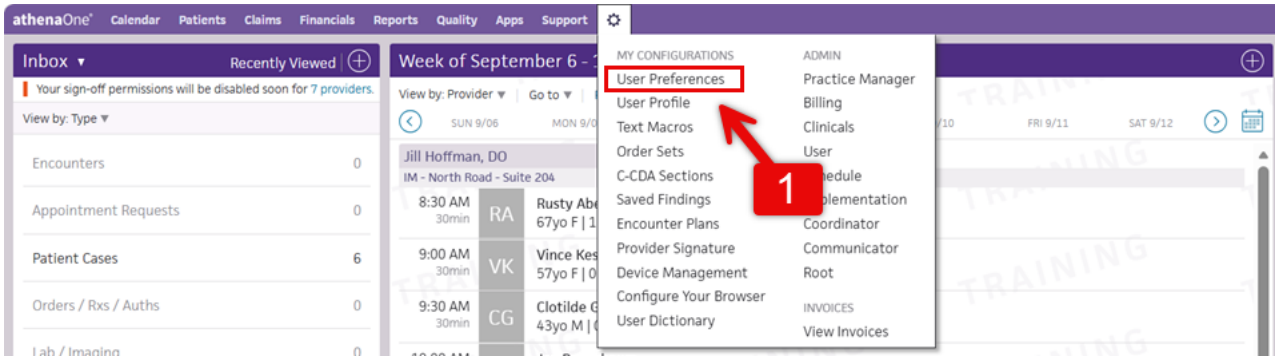
If you decide to cancel your orders before you have signed them, you must delete the order group. If you remove all diagnoses and orders from the order group but do not delete it, it will remain active and empty in the patient's chart and in your inbox. To delete the order group, simply click **Delete Order Group** at the bottom of the screen; you do not need to remove the diagnoses or orders individually.



Turning off Lab Alarms by Default

By default, all lab orders have an alarm set. If no results have returned for the order within the specified timeframe, the order will drop into your **Need Followup** inbox on the Home Page. If you'd prefer not to have alarms set by default, you can update this setting in your **User Preferences**. To do this:

1. Click the Gear icon at the top of the screen, then click **User Preferences**.



2. Check off **No lab alarms by default**.
3. Scroll to the bottom of the screen and click **Submit** to save the change.

Lab orders placed after making this change will default to having no alarm; you can still set an alarm for any labs you want to follow up on.

