

# Care360™ Labs & Meds QuickStart Guide

## Sending Results to an e-Patient

An e-Patient is a centrally located account that is set up by a patient for the purpose of routing their lab results to a Health Management Services account of their choosing, where they can view and save the lab results that you send.

### Overview

In order to send lab results to an e-Patient, you must do both of the following:

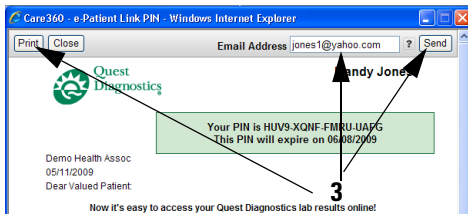
- ❑ **Provide the patient with an e-Patient PIN.** Once you generate a PIN, you can queue lab results for the patient. When the patient registers the PIN, the queued results are sent. See “Generating an e-Patient PIN” below for more information.
- ❑ **Send results to an e-Patient.** You can review and send individual results, view a list of all results pending release, or set an organization policy to specify how to automatically send results to patients. You can also respond to patient link requests when a patient initiates a request to you to connect an e-Patient with Labs & Meds. See “Sending Results to an e-Patient” on the next column for more information.

### Generating an e-Patient PIN



#### To Generate an e-Patient PIN

1. Access the patient *Summary* for whom you want to generate an *e-Patient PIN*.
2. From the management options list, click *Generate PIN*.
3. When the *e-Patient Link PIN* letter displays, do one of the following:
  - To send the *e-Patient Link PIN* letter to the patient in an e-mail, type the patient’s e-mail address at the top of the letter (in the *Email Address* box) or confirm the patient’s e-mail address if it is already available, and then click *Send*.
  - To print the *e-Patient Link PIN* letter to hand to the patient, click *Print*.



The patient must register within 28 days or the PIN will expire. If a PIN expires, you can re-generate a new PIN for the patient from the patient *Summary*.

**Note:** The e-Patient status displays on the patient *Summary* page. The status is *Requested* until the patient registers the PIN. You can queue results while the status is *Requested*. Once the patient has registered the PIN, the status changes to *Established* and all queued results are sent. If the status is *Expired*, then the PIN is no longer valid. If a patient’s PIN has expired, you can re-generate a new PIN that the patient can use to register.



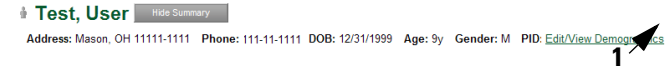
#### To Delete an e-Patient PIN

1. Access the patient *Summary* for whom you want to delete an *e-Patient PIN*.
 

**Note:** The option to delete (or remove) an e-Patient PIN is only available when the e-Patient status is *Established*. For other statuses, such as *Requested*, you can use the *Re-generate PIN* option.
2. From the management options list, click *Remove Link*.
 

**Note:** The patient’s *e-Patient PIN* is deleted and results can no longer be sent to the e-Patient.

### Sending Results to an e-Patient



#### To Send Results to an e-Patient

1. Verify that the patient is registered to accept results by accessing the patient’s *Summary* and verifying that their status is *Established*.
 

**Note:** If the status is *Requested*, you can queue results that will be sent when the patient completes the registration process.
2. Do one of the following to send results to the e-Patient:
  - To locate and send individual results, continue with steps 3 through 6.
  - To make changes to the organization’s auto-forward policy, continue with step 7.
  - To send bulk results, continue with step 8.

**Note:** Only *Final* and *Corrected* results can be sent.
3. Do one of the following to locate an individual result to send.
  - Select a result from either the *Recent Tests* or *Recent Requisitions* list from the patient *Summary*.
  - Review results listed in the *New Results*, and then select the result that you want to send.
  - Search for a result using the *Find Results* feature, and then select the result from the search results table.
  - Perform an *Informatics Query*, and then select the result from the search results table.
4. Click *Send to e-Patient* at the top of the result.
 

**Note:** Duplicate results will be sent if you click *Send to e-Patient* on the same result at different times or if a patient registers and has queued results, but does not finish the registration process until later with a new PIN.
5. At *Notes*, type the information that you want to send along with the test result data to the patient.
 

**Note:** The *Notes* are stored in the *e-Patient Sent Log*.
6. Click *Send* to send the results to the e-Patient.
7. To specify a patient-level auto-forward policy (which overrides the organization-level auto-forward policy), do the following:
  - a. Navigate to the patient *Summary* if you are not already there, and then from the management options list, click *Edit Result Policies*.

Test, User View Summary

Address: Mason, OH 11111-1111 Phone: 111-11-1111 DOB: 12/31/1999 Age: 9y Gender: M PID: 111111 [Edit/View Demog](#)

Lab Result Forwarding Policy

Use Organization Policy ← 7b

Forward Normal Results ← 7c

Forward Abnormal Results ← 7c

← 7e

Delay Hours:  ← 7d

Send Historical Lab Results

Send lab results from the past  ← 8a

Send Normal Results ← 8b

Send Abnormal Results ← 8c

← 8c

- b. At *Lab Result Forwarding Policy*, click the *Use Organization Policy* check box (which is set by default) to clear its selection.
- c. Specify the results (with an *Order Status* of *Final* and/or *Corrected*) that you want to send:
  - o Select the *Forward Normal Results* check box to automatically send incoming results that are normal.
  - o Select the *Forward Abnormal Results* check box to automatically send incoming results that are marked abnormal ( **a** ).

**Note:** You cannot select abnormal only as your results forward policy.
- d. At *Delay Hours*, type the number of hours that you want to delay the results release from the time that they are received (if you want to review the results first).
- e. Click *Save*.
8. To send bulk results to the e-Patient, do the following:
  - a. Type the number of months (prior to the current month) that you want to send lab results.
  - b. Specify the results (with an *Order Status* of *Final* and/or *Corrected*) that you want to send in bulk:
    - o Select the *Send Normal Results* check box to bulk send results that are normal.
    - o Select the *Send Abnormal Results* check box to bulk send results that are marked abnormal ( **a** ).
  - c. Click *Send Now*.

- a. Select the check box to the left of the patient name (you can select one or multiple patients), or select all of the patients by selecting the check box in the header column to the left of the *Patient Name* column.
  - b. Specify a *Lab Result Forwarding Policy* or *Send Historical Lab Results*.
  - c. Click *Approve*.
4. To deny a patient link request, after selecting the appropriate patient or patients, click *Decline* and then click *OK* to confirm that you want to deny the link request.
- Note:** Even if you decline a patient link request, you can still receive link requests from this patient in the future.

### Address Pending Link Requests From the Patient Summary Page

1. Access the *Summary* of the patient for whom you want to address a pending link request (the *Pending Approval* status displays on the patient *Summary*).
- Test, User Hide Summary
- Address: Mason, OH 11111-1111 Phone: 111-11-1111 DOB: 12/31/1999 Age: 9y Gender: M PID: [Edit/View Demographics](#) ← 1
2. From the management options list, do one of the following:
    - Click *Approve* to approve the patient's link request and begin sending results to the e-Patient according to your organization's results policy.
    - Click *Decline* to deny the patient's link request.
    - Click *Edit Result Policies* to review and/or make changes to the results policy for this patient and then send the results.

### Sending Results Pending Release to an e-Patient

Send To e-Patient Remove Selected Refresh Results that require manual release to e-Patients:

View 10 items on a page

<input type="checkbox"/>	Rvwvd	Antd	Status	Requisition Number	Patient Name
<input type="checkbox"/>				JPO03	Pope, John
<input type="checkbox"/>				JPO01	Pope, John

← 3

4

### Viewing the e-Patient Sent Log for a Lab Result

Annotations Tasks Messages e-Patient Sent Log ← 3

Date	Time	User	Other PHRs	Error	Success
01/13/09	04:10 PM	User, Any	Other PHRs	Error	This lab report was sent as part of a bulk ex
01/13/09	03:46 PM	User, Any	Google Health	Success	This lab report was sent as part of a bulk ex

### View the e-Patient Sent Log

1. Access the *Summary* of the patient for whom you want to view the *e-Patient Sent Log*.
  2. Select the result you want to verify was sent to the e-Patient.
  3. Click the *e-Patient Sent Log* tab to view the information.
- Tip:** If the *e-Patient Sent Log* displays *Error* after the date and time, the result was not delivered to the e-Patient. Follow the steps in the *Send Results to an e-Patient* section to re-send the result.

### To Address Patient Link Requests from the Quick View Page

1. Access the *Quick View* page.
2. Review the alerts section, and then click *Resolve* next to *patient link requests*. ← 2
3. On the *Pending Link Requests* page, do the following to approve link requests and begin to send results to the patient or patients (patients are listed in descending date order):

Quick View > Patient Link Requests

Lab Result Forwarding Policy ← 3b

Use Organization Policy ← 3b

Forward Normal Results ← 3c

Forward Abnormal Results ← 3c

← 4

← 4

<input type="checkbox"/>	Patient Name	PID	DOB	Age	Gender	Address
<input type="checkbox"/>	Test, User 1	111111	12/31/1999	9y	M	Address Line 1, OH 12345
<input type="checkbox"/>	Test, Patient		01/08/1987	22y	F	123 main street, MT 47041
<input type="checkbox"/>	Test, User 2		11/22/1972	36y	M	Address Line 1, OH 12345

3a

### Send Results Pending Release to an e-Patient

1. Click the *Message Center* tab.
  2. From the *Labs* menu, click *Results Pending Release*.  
The *Results Pending Release* page appears, displaying a list of results that are pending release. Results pending release are results that are not automatically sent to patients due to the forwarding policy. For example, if the organization policy is set to only send normal results, then the abnormal results will display in the results pending release list.
  3. Select the lab result(s) you want to send to the e-Patient.
  4. Click *Send to e-Patient* to send the selected lab result(s).
- Note:** Sending a result to an e-Patient removes it from the *Results Pending Release* list. All results (whether new or previously viewed, manually removed, or sent to an e-Patient) are always available from the associated patient's chart.
5. Enter any notes that you want to send along with the test result(s) data to the e-Patient.
- Note:** The notes that you enter for the selected result(s) will appear on each result and in each individual result's *e-Patient Sent Log*.
6. Click *Send* to send the result(s).

For help, contact the Help Desk at 1-800-697-9302.

