This demonstration reviews ways in which you can order lab tests, then view and respond to the results. Details of the workflow will likely vary somewhat, depending on specialty and clinic policy, though this should give you a good idea of NextGen functionality.

This has been prepared for EHR 5.7 & KBM 8.3, though a few screen shots from earlier versions may be used when they don’t affect the clarity of the presentation. Subsequent updates may display cosmetic & functional changes.

Use the keyboard or mouse to pause, review, & resume as necessary.
Ordering Outside Lab Tests

• There are a few different ways to place outside lab orders in NextGen. There are advantages & disadvantages to the various methods, & some have had technical limitations preventing us from using them.

• In this demonstration we'll illustrate the “Order Module” method of lab ordering, which is our recommended method until we learn more about KBM 8.3.
Begin by clicking the Order Module at the bottom of the History Bar.

Most users will find it helpful to add the Order Module to the Menu Bar as well.
The **Orders Module** opens with the **Results** tab displaying. Change to the **Orders Summary** tab.
Click **New**.

You may notice that if you click the dropdown arrow, you’ll have the choice of **Lab Order** or **Radiology Order**, or **Immunization Order**. For this lesson, we’ll be focusing on Lab Orders.
Note these 3 tabs. The popup opens on the Select Tests tab, which is where you will do most of your work. However, there are times when you might want to go to the General tab, so let's click on that.

The New Lab Order popup appears.
Billing type will be Third Party by default, with insurance information displaying spontaneously. The provider usually won’t have to do anything here, though it would be best to change Billing type to Patient if the patient has no insurance at all, to avoid an error message/task upon sending the order.

Routine will be selected as the default Order Priority, but you can change that to STAT as necessary.

Now let’s go back to the Select Tests tab.
Select the Performing Entity. For most of our lab work, this will be LabCorp. (This may display by default).
Next select the diagnoses that are to be associated with the order. You’ll see the patient’s chronic problems & any assessments you’ve added today. You can also search for additional diagnoses. A common example of when you might want to do this would be to add the diagnosis of V76.51 (colorectal cancer screening) when ordering a FIT.
Now select the tests you would like done. You will initially see your Favorites List.
You can use the **Show Favorites** button to toggle back and forth from your **Favorites List** and the pre-populated **Practice Favorites List**.
An alphabetical list of Practice Favorites tests will display.

If you don’t see the test you need, click **Search All**....
Enter some search criteria then click Find.

Click the Checkbox for the desired test, then click OK.
If you click **This Order**, you will also see all the tests you’ve ordered here.

Your test will be added to the bottom list.
However you have selected tests, you can click Add to Favorites to add them to your personal Favorites List.
Whichever way you pick the test, when you click the checkbox, it will appear on the list at the bottom.

If desired, you can fine-tune which diagnoses are assigned to which test.
Next click **Save & Send**. We ask that you do this even if you'll ultimately print or fax the order, to help the result come back correctly & quickly.
When your tests have been successfully submitted, you’ll see your orders on the Orders Summary Tab. You can add more orders if desired.
Notes about sending vs printing lab orders:

- Clinics with a LabCorp service center in the building (currently Pediatrics & Family Medicine) theoretically could get by without printing orders, but we've had issues with the electronically-transmitted orders not reaching LabCorp before the patient does. So it is best to also print or fax an order in addition to transmitting it electronically when you're sending patients directly to the lab from the clinic. If you're ordering something that is going to be done on another day, or even just an hour later, you're usually OK with just the electronic transmission.

- For clinics who just have a LabCorp phlebotomist on site, you'll always want to print or fax the order—but we still ask you to include the Save & Send step to help results get back to the chart efficiently.
And here’s another tip. While it looks like you could print an order using the Save & Print button, DON’T DO IT. Due to confusing interactions between NextGen, our computers, our computer network, tides, & solar wind, you don’t know which printer this gets sent to—and you don’t get the opportunity to choose a printer. Instead, click Save & Send, then close the order popup.
Instead, back in the order module, click the **Print dropdown arrow**.

Then click **Print Preview**.
A printable version of the order appears. (It can take several seconds for this to display.) Click the Printer Icon.
Now you’ll have the opportunity to choose your printer. After you’ve picked a nearby printer, click **Print**.
Occasionally you may need to generate an ABN (Advance Beneficiary Notice); this can be done by clicking **ABN Options**. Most of the time, however, LabCorp will deal with this.
Occasionally you may see this [!] symbol. It means there are Ask At Order Entry questions that you need to answer. Clicking it takes you to the Test Details tab.
Respond to these questions by clicking in the Answer box and selecting from the dropdown list.

(You don’t have to worry about any of this middle section.)
If you try to Save without addressing the Ask At Order Entry questions, you may get this popup. After clicking OK you’ll have the chance to answer the questions again.
Note that you can check the **STAT** box if you wish a test to be completed stat. (This gives you a way to make an order STAT without having to go to the **General** tab at the bottom.)

Unfortunately, LabCorp sometimes seems to overlook the **STAT** status of orders sent electronically. To be on the safe side, it is best to print the order as illustrated above to give to the patient, highlighting in writing that it is **STAT**.
On the Test Details tab you can also type in the **Test Comment** field, adding any other notes you wish.
Reviewing Lab Results

• You will be notified about test results through your Task List or PAQ.
• After reviewing results, you’ll use the Telephone template to address them.
• You review test results through the Order Module, regardless how you placed the order.
The primary way in which you will be notified about test results is through your Task List. Select the task and click the **Chart** button (you will accept the task along the way).
Click on the **Order Module** button; alternately, you can select the **Order Module** from the **Encounter History**.
You can select a particular test and click **Graph...** to see a graph of that test over time.

The **Order Module** will open on the **Results** tab; test results will display in a grid.
Results in **RED** are high. Results in **BLUE** are low.

You can click on any result to display full details, such as the normal range.
Results that are underlined have additional comments. Click on the result to display them.
To sign off on a result, go to the **Orders Summary** Tab.

Alternately, you can click the **Go to Order** button to go directly to that one test on the **Orders** Tab.
Note that you can select a test then click the Results dropdown arrow to see the results here, too.
Select the test & click the **Sign-off...** button.
Provide your User Name & Password, then click Sign-off.

Check the Sign-off All Assigned Orders box if you want to sign off on all the results at once.
Sign-off details will display.

Signing off your lab orders here has the additional effect of marking this lab result notification as “Completed” in your Task List.
Note there is an area here to enter sign-off comments. If you use this, these comments can be viewed later by clicking the Sign-off Comments dropdown arrow.

While this is usable, there are other ways to sign off that are more versatile & maintain a running log of your responses to test results. (This goes for other types of test results, like X-rays or scanned paper reports, as well.)
In the past we have recommended using the Provider Test Action template to record comments about test results. However, we have found that continuity is better if we just use the Telephone Template for this. (Our current version of this template is called USA Phone & Clinic Memos.) The easiest way to get to this is through the Telephone Icon on the Info Bar.
Select the heading of your choice (or just pick Clinic Memos/Other Notes).
Type your message, then click **Send & Close** to send a task to your nurse.
Back on the Telephone Template, generate the telephone document. When the nurse adds her comments, everything will be in the same document, in chronological order.
Printing Lab Results

Sometimes you just need a copy of the lab results on paper. You've got a few options for that.
There are a few ways to print lab results, e.g., if you need to give a copy to the patient. If you just want to print one lab order, on the Order Module Orders Summary tab, click the Results button to display results at the bottom.

The Print button will allow you to print that report.
You have other options through the Document Library. Selecting **Lab Results-Last 30 Days** will generate a report with all tests done in the last 30 days. **Lab Results-All** will generate a report with all tests done on the patient since LabCorp ordering went live circa June 2011.)
Click the **Printer icon** to select a printer & print the report.

---

**PATIENT:** EUGENIA QUAGMIRE  
**DATE OF BIRTH:** 01/03/1959  
**DATE:** 06/11/2014

**Lab Results**

All lab results received since June 2011.

<table>
<thead>
<tr>
<th>ORDER: Urine Culture, Routine</th>
<th>Sent</th>
<th>Failed</th>
<th>Ordered</th>
</tr>
</thead>
</table>

| ORDER: BMP  
Basic Metabolic Panel (8) | Final | Signed-Off |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td><strong>Result</strong></td>
<td><strong>Flags</strong></td>
</tr>
<tr>
<td>BUN</td>
<td>10</td>
<td>6-24</td>
</tr>
<tr>
<td>BUN/Creatinine Ratio</td>
<td>12</td>
<td>9-23</td>
</tr>
<tr>
<td>Calcium, Serum</td>
<td>10.2</td>
<td>8.7-10.2</td>
</tr>
<tr>
<td>Carbon Dioxide, Total</td>
<td>19</td>
<td>19-28</td>
</tr>
<tr>
<td>Chloride, Serum</td>
<td>104</td>
<td>97-108</td>
</tr>
<tr>
<td>Creatinine, Serum</td>
<td>0.85</td>
<td>0.57-1.00</td>
</tr>
<tr>
<td>eGFR If African Am</td>
<td>89</td>
<td>&gt;59</td>
</tr>
<tr>
<td>eGFR If NonAfrican Am</td>
<td>77</td>
<td>&gt;59</td>
</tr>
<tr>
<td>Glucose, Serum</td>
<td>85</td>
<td>65-99</td>
</tr>
<tr>
<td>Potassium, Serum</td>
<td>4.7</td>
<td>3.5-5.2</td>
</tr>
<tr>
<td>Sodium, Serum</td>
<td>141</td>
<td>134-144</td>
</tr>
</tbody>
</table>
This concludes the NextGen Lab Orders and Results demonstration.

42.7% of all statistics are made up on the spot.

R. Lamar Duffy, M.D.
Associate Professor
University of South Alabama
College of Medicine
Department of Family Medicine