

Beaker for Ambulatory Clinics

Application: Ambulatory

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Beaker Ambulatory Workflows

Northwestern Medicine is transitioning their laboratory information systems (LIS). The laboratories will move from PathNet, Mlab, and CoPath to a new platform, Beaker.

Beaker is an Epic module integrated into the current Epic Hyperspace system used throughout Northwestern Medicine.

These workflows are currently in place for RMG and will be going live for NMG on July 24, 2021.

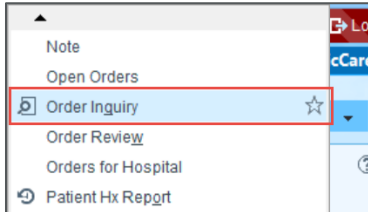
Impact to Ambulatory Clinics

- Workflow and visual changes to clinic collect and pathology specimen collection
- Courier logs to accompany specimens shipped to laboratories
- Streamlined specimen add-on workflows
- Minor visual changes in Chart Review

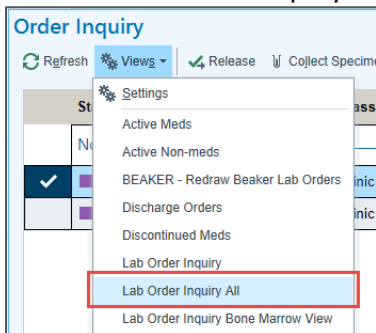
Configure Set Up Items

Configure the following items to optimize Beaker workflows. These set up actions will only need to be configured once.

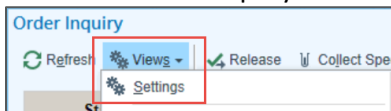
1. Clinicians will now use the Order Inquiry activity to manage Collection orders. To set it as a favorite activity, star ☆ the Order Inquiry activity from the Action ▾ menu.



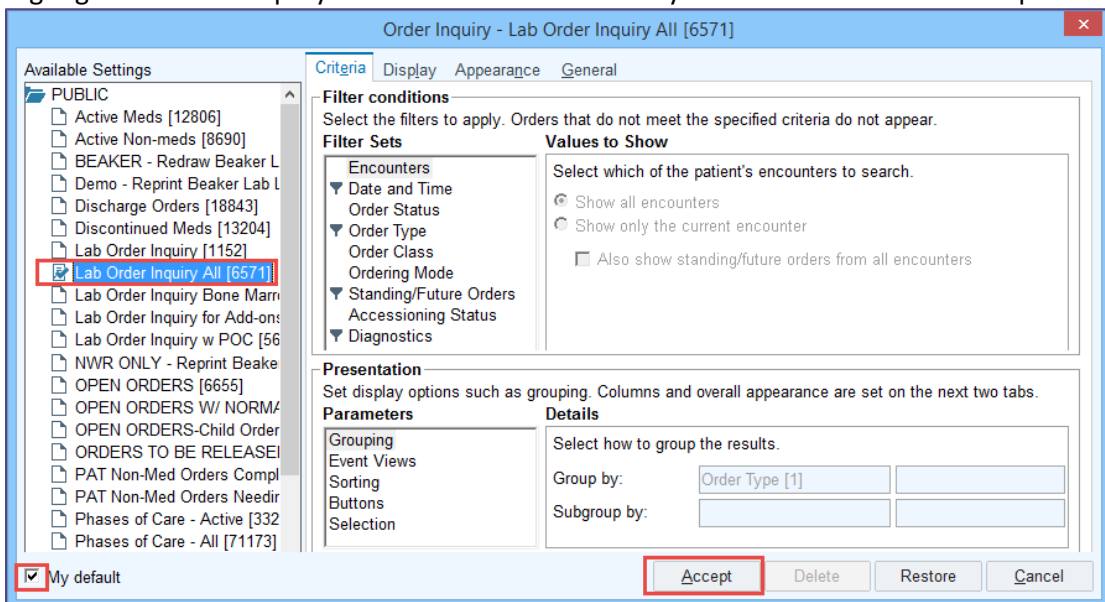
2. The Order Inquiry activity displays the Open Orders report by default. Clinicians should change this to the Lab Order Inquiry All report.



3. To set Lab Order Inquiry as the default report, choose Views and Settings.



4. Highlight Lab Order Inquiry All then check the box for My Default and select the Accept button.

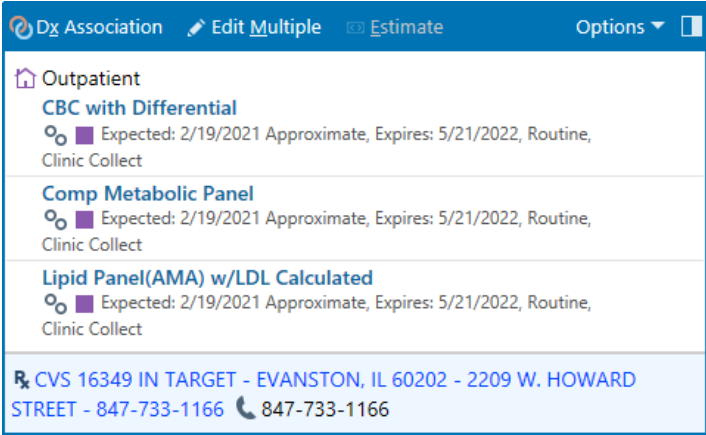


Document the Specimen Collection

All specimen collections will be documented in the Order Inquiry activity. Order inquiry allows for all specimen collection tasks to be completed within one activity. Users no longer need to release orders, but the process will still function if an order is released.

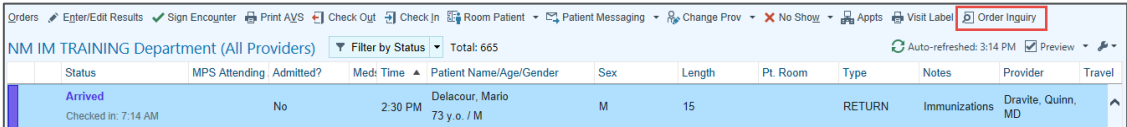
Order and Collect the Specimens

1. Place the appropriate orders.

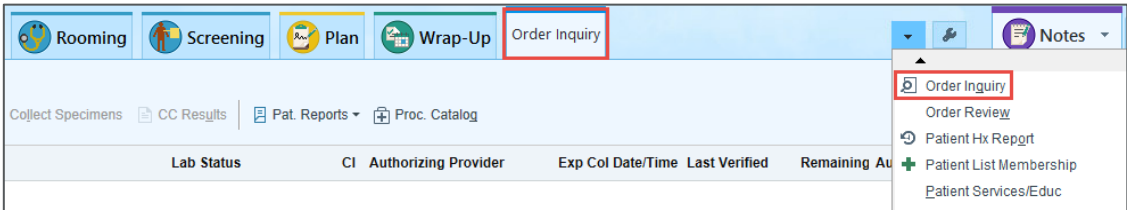


2. Open the Order Inquiry activity. It can be accessed either the schedule or the encounter.

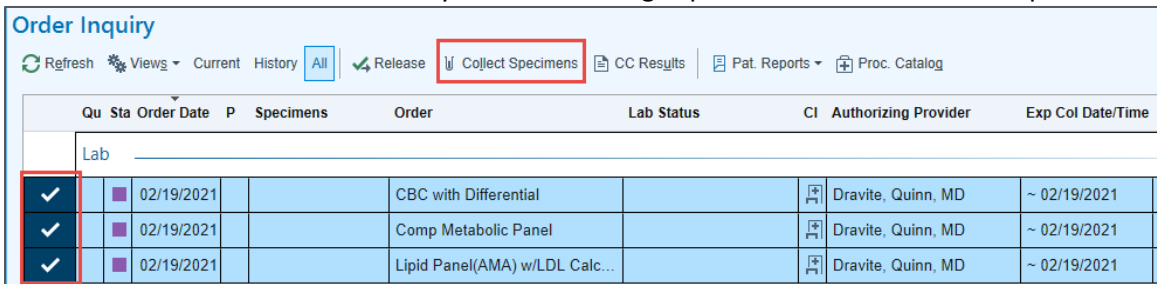
- Access from the schedule.



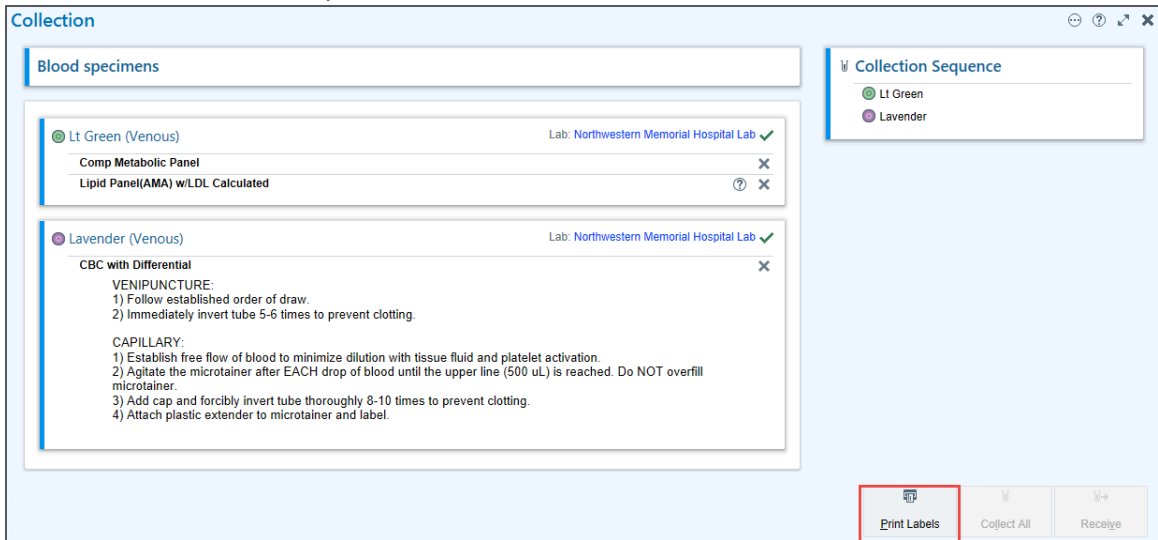
- Access from within the encounter.



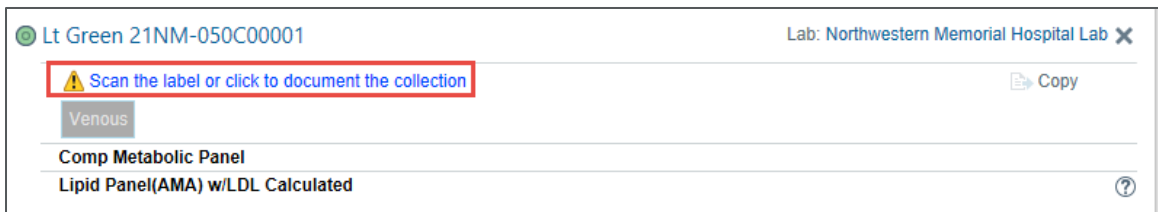
3. Check the box next to each test that you are collecting a specimen for. Select Collect Specimens .



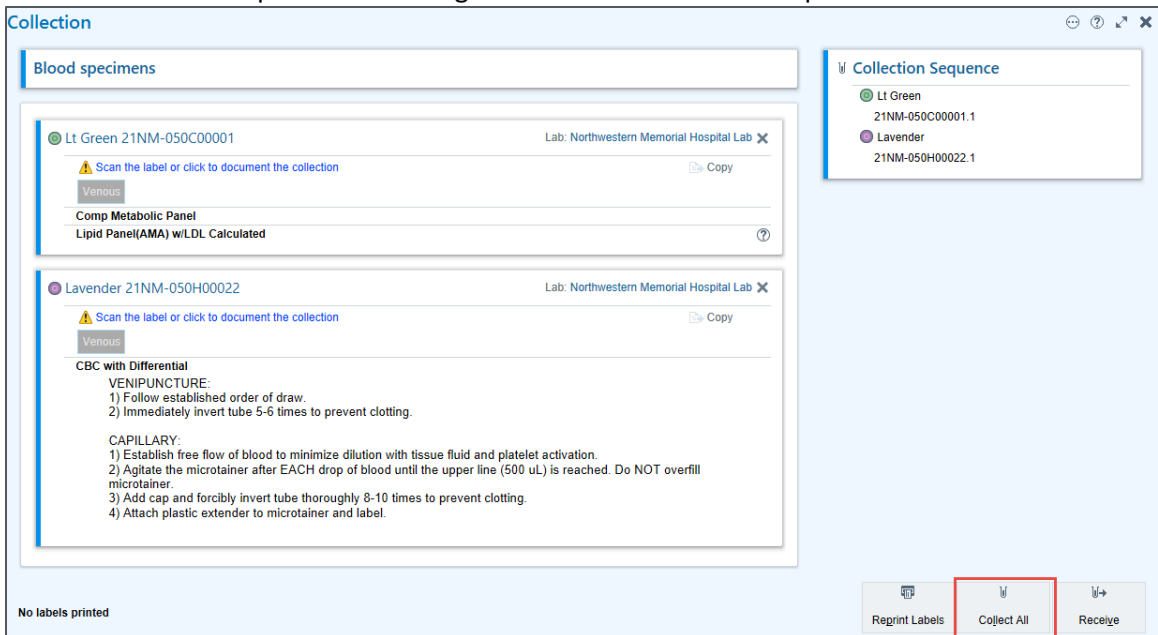
- From the Collection activity, select Print Labels.



- Once the labels have been printed, confirm the patient name, DOB and specimen type.
- Place the label on the specimen container.
- Scan the label or select the link to document individual collection.



- Users also have the option of selecting Collect All to document all specimens collected at once.



- Once all the specimens have been collected, select Receive.

Lab: Northwestern Memorial Hospital Lab

Collected on 2/19/2021 at 1543 by ARTINITE, TERRY in NM IM TRAINING via Blood Collection

Venous Venous

CBC with Differential

VENIPUNCTURE:

- Follow established order of draw.
- Immediately invert tube 5-6 times to prevent clotting.

CAPILLARY:

- Establish free flow of blood to minimize dilution with tissue fluid and platelet activation.
- Agitate the microtainer after EACH drop of blood until the upper line (500 uL) is reached. Do NOT overfill microtainer.
- Add cap and forcibly invert tube thoroughly 8-10 times to prevent clotting.
- Attach plastic extender to microtainer and label.

✓ All collections documented

Reprint Labels Collect All **Receive**

Collect Pathology and Cytology Specimens

NOTE: RMG Clinics will continue to use the generic patient label when performing the specimen collection at the patient's bedside. The label must include the patient's name, patient's DOB, specimen site/source, collection date & time, and collector ID. The person performing this documentation is the person who witnessed the collection.

- Place the pathology order.

Dx Association Edit Multiple Estimate Options

Outpatient

Surgical Pathology

Routine, Clinic Collect

Source of specimen(s): Hand, Left, Arm, Left lower

Clinical Information: Multiple lipomas

Procedure: Lipoma excision

CVS 16349 IN TARGET - EVANSTON, IL 60202 - 2209 W. HOWARD STREET - 847-733-1166 847-733-1166

- Open the Order Inquiry activity and select the pathology order.
- Choose Collect Specimens.

Order Inquiry

Refresh Views Current History All Release Collect Specimens CC Results Pat. Reports Proc. Catalog

Qu	Sta	Order Date	P	Specimens	Order	Lab Status	CI	Authorizing Provider
					Lab			
		02/19/2021		21NM-050H00022	CBC with Differential	In process		Dravite, Quinn, MD
		02/19/2021		21NM-050C00001	Comp Metabolic Panel	In process		Dravite, Quinn, MD
		02/19/2021		21NM-050C00001	Lipid Panel(AMA) w/LDL Calc...	In process		Dravite, Quinn, MD
					Pathology and Cytology			
✓		02/19/2021			Surgical Pathology			Dravite, Quinn, MD

- Verify the source of the specimen and print the labels.

Source of specimen(s)	Answer	Comment
	Hand, Left [49]	
	Arm, Left lower [420]	

NOTE: The source of the specimen can be updated from collection window. Users can document additional specimens or edit the existing ones.

5. Replace the generic patient label with the printed lab label.
 - NM label policy dictates that if a label will be placed over another label, the second label is to be positioned in such a way that the initial label will still have the patient's name visible, making it possible to confirm that both labels match.
6. Document the collection and select Receive.

The screenshot shows a 'Collection' window with the following elements:

- Tissue specimens:** Surgical Pathology, Lab: Northwestern Memorial Hospital Lab
- Specimen A:** A. Hand, Left Ster Cont. Includes a warning icon and the text 'Scan the label or click to document the collection', a 'Copy' button, and a 'Hand, Left' button.
- Specimen B:** B. Arm, Left lower Ster Cont. Includes a warning icon and the text 'Scan the label or click to document the collection', a 'Copy' button, and an 'Arm, Left lower' button.
- Collection Sequence:** x2 Ster Cont, 258419-A, 258419-B
- Procedure:** Lipoma excision
- Special instructions:** (empty field)
- Buttons:** Reprint Labels, Collect All, Receive (highlighted with a red box)

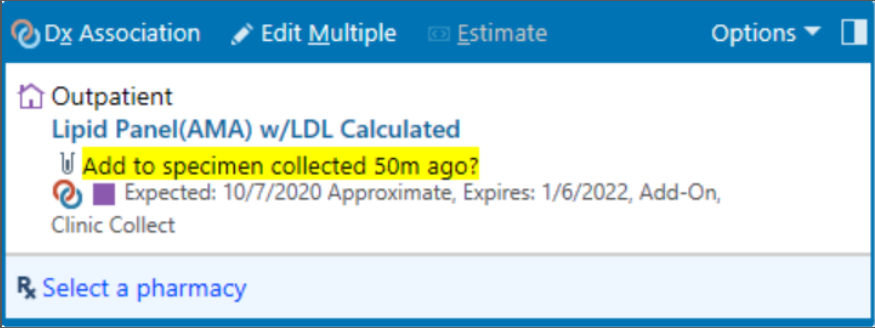
RMG Derm Path Orders

1. Use Order Inquiry to print three barcode labels and document the collection as outlined above.
2. Place the barcode label on the specimen container bag, on the printed requisition, and in the paper log book.
3. Use a generic patient label for each individual specimen. The specimen source should be handwritten on each label.

Place Add-On Lab Orders

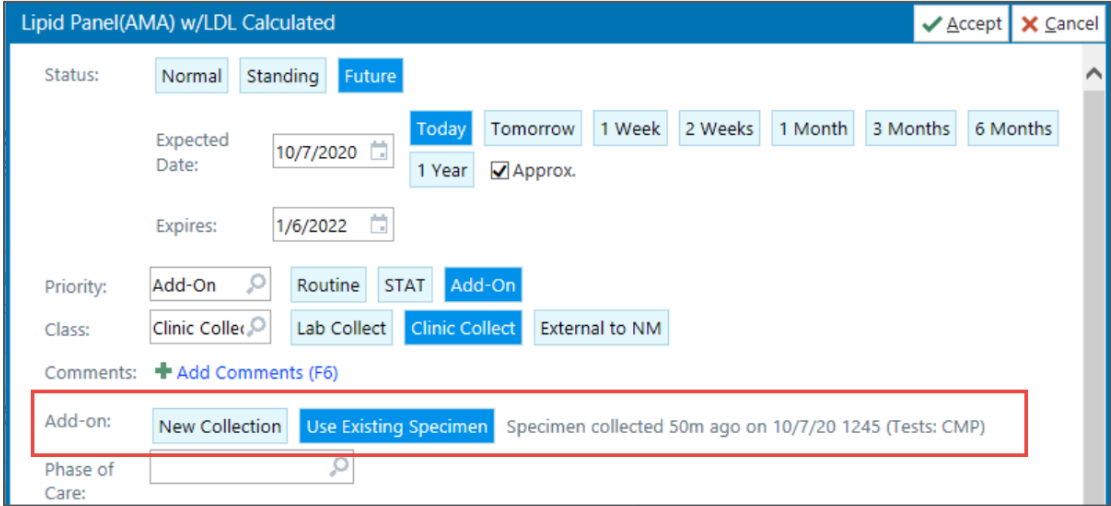
Epic now allows users to add an add-on order to an existing specimen. Please note, this option will appear once the processing lab has received the specimen on site. In most cases, the specimen will be available for add-on for 24 hours after the lab has received it.

1. When placing the order for the add-on lab, the system will automatically detect if there is an appropriate specimen collection to use. Users will see this in both the Shopping Cart and Order Composer.



2. From the Order Composer, users can select New Collection or Use Existing Specimen.

The priority does not need to be updated to Add-On for the process to work.



CRITICAL PROCESS

If the specimen is in transit or still at the clinic, users will not have the option to add to an existing specimen. Users should place an additional order and call the lab in these situations.

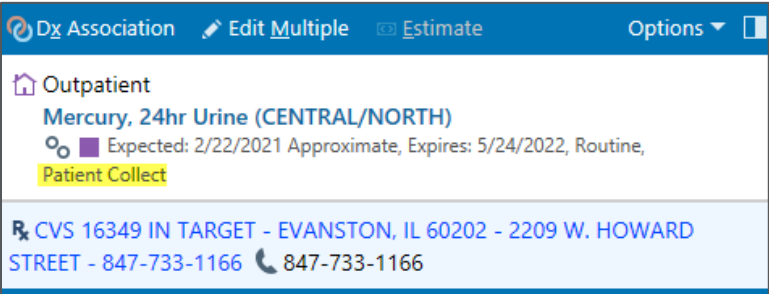
Document Patient Collected Samples

Patient collected samples will now be documented in Beaker.

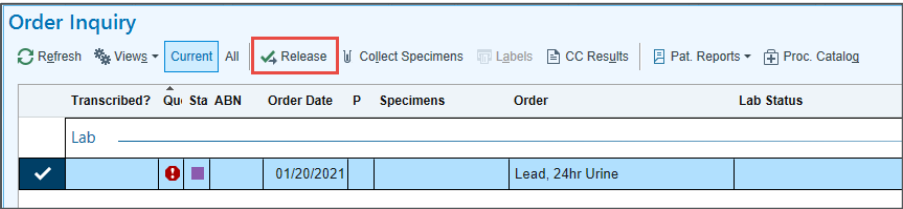
Place the Order

Users can place Patient Collect orders for urine, body fluid, and stool specimens.

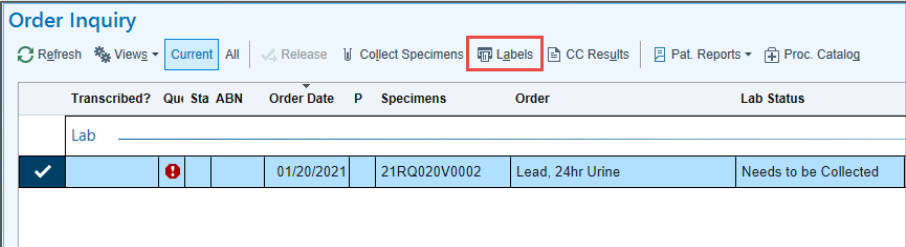
- 1. Place the appropriate order with a class of Patient Collect.



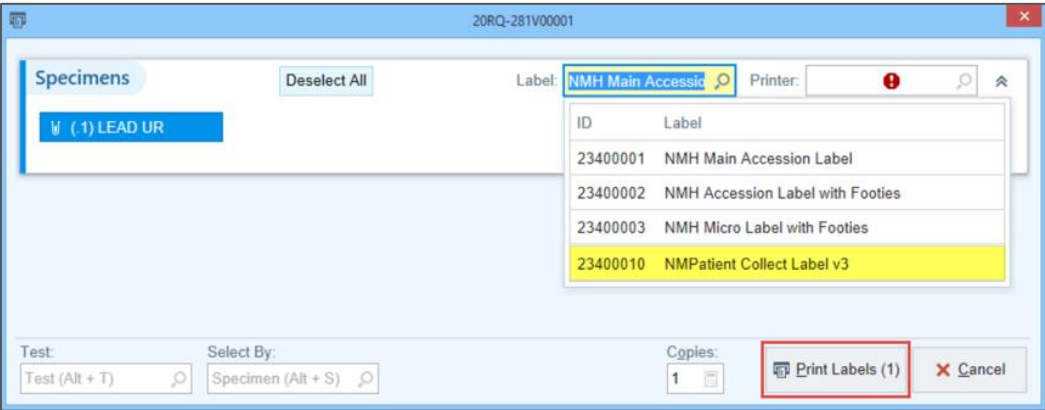
- 2. Open Order Inquiry and Release the appropriate order.



- 3. Select the Labels button.



- 4. From the drop-down menu, select NMPatient Collect Label.



- 5. Print the label.
- 6. If a patient returns a specimen to the clinic, users should add the specimen to the packing list.

Create and Manage Packing Lists

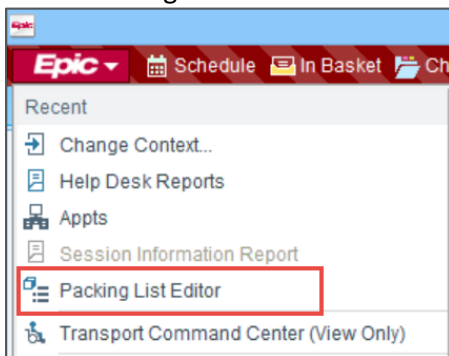
The Packing List creates a courier log for transportation to the laboratory. Departments may need to create up to three separate packing lists based on the specimen's temperature. These temperatures include:

- Room temperature specimens
- Refrigerated specimens
- Frozen specimens

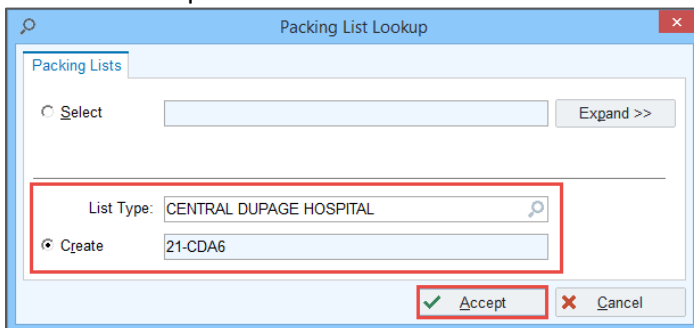
Departments located on-site with the lab do not need to create a Packing List if they are walking the specimens directly to the lab.

Create a New Packing List

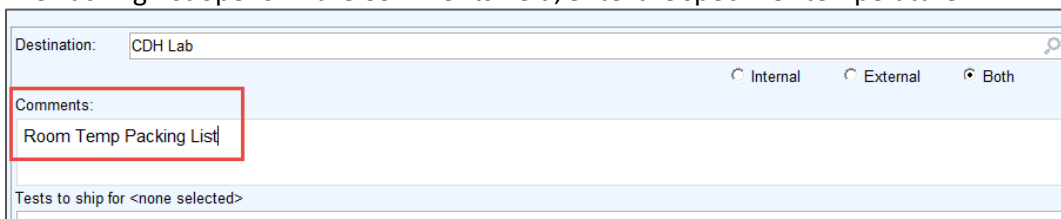
1. Open the Packing List Editor from the Epic menu. It can be found via Epic Menu>Tools>Lab Tools>Packing List Editor.



2. Choose the radio button next to Create.
3. The packing list will automatically generate a name and location. Confirm that the location is correct and update it if necessary.
4. Select the Accept button.

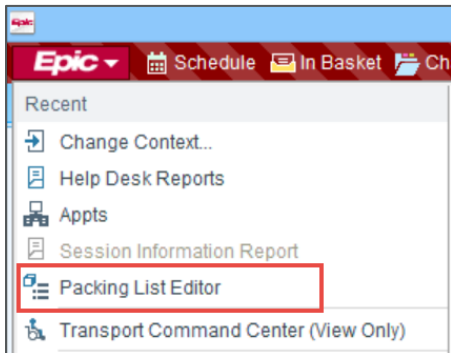


5. The Packing List opens. In the Comments field, enter the specimen temperature.

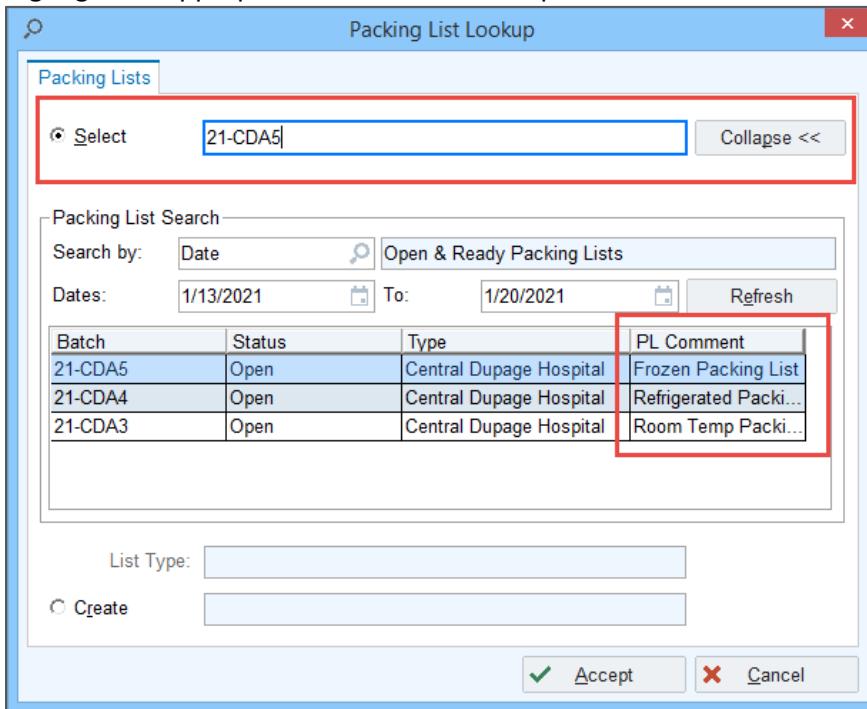


Access an Existing Packing List

1. Open the Packing List Editor from the Epic menu. Users can also find it via Epic Menu>Tools>Lab Tools>Packing List Editor.



2. Choose the radio button next to Select. The specimen temperature will display in the PL Comment field.
3. Highlight the appropriate list and select Accept.



Manage a Packing List

1. Scan the specimen label to add each specimen to the packing list. If the scanner is not available, users can also add items by using the Accession number found in Chart Review or on the label.

The screenshot shows the 'Chart Review' window with the 'Labs' tab selected. A table lists lab tests with columns for Date/Time, Test, and Status. The 'Today' section shows three entries: 'Lead, 24hr Urine' (Needs to be Collected), 'CBC with Differential' (In process), and 'Comp Metabolic Panel' (In process). The '1 Year Ago' section shows several historical entries for 'Comp Metabolic Panel' and 'CBC with Differential' with statuses ranging from 'Future' to 'Pending'. On the right, a patient information panel for 'Zztest, Kurt' is visible, including MRN, DOB, Sex, and Visit date. Below this, the lab name 'Northwestern Medicine' and 'NM Family Medicine' address are shown. A highlighted section displays 'Comp Metabolic Panel (Accession 20CD-281C00002) (Order 1163699881)'.

2. When all specimens have been added to the Packing List, select Ready. This will print the courier log. The list can no longer be edited.

The screenshot shows the 'Packing List Editor' window. The 'Select Tests' dropdown menu is set to 'Ready', which is highlighted with a red box. Below the menu is a table with columns: Pos, Container, Tests on Packing List, and Test IDs. The table contains two rows: Row 1: Pos 1, Container 20CD-281H00002.1, Tests on Packing List CBC W/ DIFF; Row 2: Pos 2, Container 20CD-281C00002.1, Tests on Packing List Comprehensive Metabolic Par. The 'Destination' field is set to 'CDH Lab' and there is a 'Comments' field.

- If the list does need to be edited, select Unready and make the changes. Once a user selects Ready again, a new packing list will print.

The screenshot shows the 'Packing List Editor' window. The 'Select Tests' dropdown menu is set to 'Unready', which is highlighted with a red box. The table structure and content are identical to the previous screenshot, showing two rows of test information.

3. Place the printed packing list in the specimen bag. The label must be facing up so it can easily be scanned by the courier. Once the courier has picked up the specimens to bring them to the lab, mark the list as Picked Up. This list is now complete.

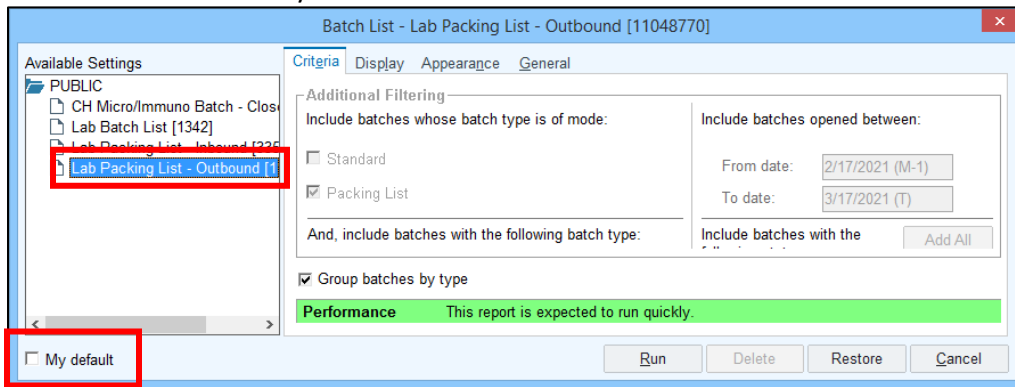
The screenshot shows the 'Packing List Editor' window. The 'Select Tests' dropdown menu is set to 'Picked Up', which is highlighted with a red box. The table structure and content are identical to the previous screenshots, showing two rows of test information.

CRITICAL STEP: RMG Clinics: Medspeed labels are no longer needed as the barcode at the top of the packing list will now be scanned. The one exception to this is if your site sends specimens to a destination other than CDH. If this applies to your office, then you will continue to use the Medspeed destination label for those alternate specimens only. If there is no destination label on the bag, it will be assumed that the sample is to be brought to CDH.

Reprint a Packing List

Packing lists created within the last 30 days can be reprinted using the Batch List activity.

1. Navigate to the Batch List activity using Chart Search or wrench it onto your Epic/Main Toolbar.
2. Choose the Lab Packing List – Outbound report setting.
3. Check the box next to My default in the bottom left hand corner and select Run.



4. Once in the Batch List, all Packing Lists within the last 30 days will display.
 - In the left pane, view the Packing List number, when it was created, the status, and the number of specimens placed in the packing list.
 - In the right pane, view the destination lab and the specimens placed in the packing list.

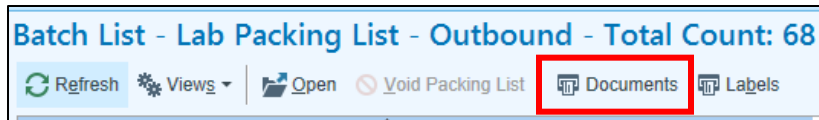
Batch	Created	Status	# of Specs
21-CDA10694	02/17/2021	Closed	1/2000
21-CDA10699	02/17/2021	Closed	27/2000
21-CDA11008	02/17/2021	Closed	7/2000
21-CDA11012	02/17/2021	Closed	1/2000
21-CDA11503	02/19/2021	Closed	22/2000
21-CDA11508	02/19/2021	Closed	1/2000
21-CDA11546	02/19/2021	Closed	10/2000
21-CDA12060	02/19/2021	Closed	44/2000
21-CDA12389	02/19/2021	Closed	27/2000
21-CDA13182	02/22/2021	Closed	15/2000
21-CDA13407	02/22/2021	Closed	1/2000
21-CDA13468	02/22/2021	Closed	10/2000
21-CDA13710	02/22/2021	Closed	3/2000
21-CDA14078	02/23/2021	Closed	29/2000
21-CDA14360	02/23/2021	Closed	16/2000

Container	Collected	Patient	Demographics	Test
1. 21CD-048H01375.1	2/17/2021 1510	Janik, Christina (000890961)	F, 52 yrs	● CBCD
2. 21CD-048H01065.1	2/17/2021 1304	Adamczyk, Shirley C (000916338)	F, 67 yrs	● ESR
3. 21RQ048W0252.1	2/17/2021 1510	Janik, Christina (000890961)	F, 52 yrs	● HEPATITIS B
4. 21CD-048C02654.1	2/17/2021 1150	Martinez Loya, Sandra V. (005665626)	F, 30 yrs	● CMP

- Manage a long batch list by either single clicking on each column header to place it in ascending/descending order or right click the column header to filter the list even further.

Batch	Created	Status	# of Specs
CENTRAL DUPAGE HOSPITAL		Ascending	
		Descending	
21-CDA10694	02/17/2021	Custom	1/2000
21-CDA10699	02/17/2021		
21-CDA11008	02/17/2021		
21-CDA11012	02/17/2021		
21-CDA11503	02/18/2021	Closed	
21-CDA11508	02/18/2021	Closed	
21-CDA11546	02/18/2021	Closed	

- Select the desired packing list to reprint, then select the Documents button found on the activity toolbar.



- Enter the information in the following fields:

Packing List: 21-CDA11008

Document type: **A** Report

Print new: Reprint: **B** Lab - Packing List Snapshot (CSS)

Recipient: Fax number:

Printer: **C** APFSP51

Copies: **D** 1 per Packing List

Only print documents for the following:

Specimen: Test:

E Print Cancel

21-CDA11008 Type: CENTRAL DUPAGE HOSPITAL
Created: 2/17/2021 Status: Closed

Comments:
REFRIGERATED PM

From: RMG PRIMARY CARE 2635 CHURCH RD STE 201 (AURORA)
Picked Up: 2/17/2021 1616

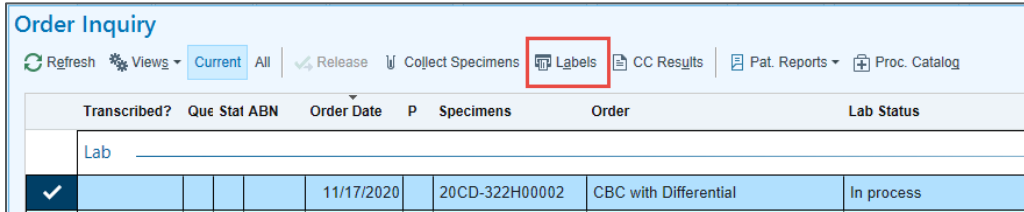
To: CDH Lab
Closed: 2/17/2021

- Document Type: Report
- Reprint: Lab – Packing List Snapshot (CSS) (Will default in)
- Printer: Select printer
- Copies: Enter number of copies
- Select the Print button to print the packing list

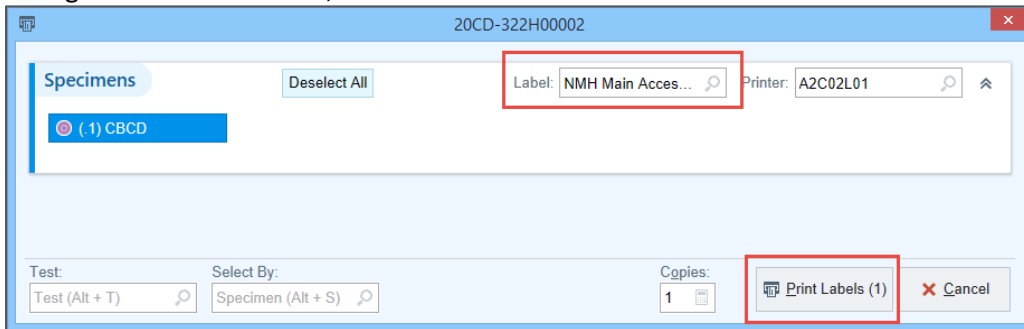
Reprint Labels

Users can easily reprint specimen labels with Beaker.

1. Open Order Inquiry and select the test(s).
2. Select Labels.



3. Change the label if needed, then select the Print Label button.



Review Lab Information in Chart Review

Users will notice minor visual changes in the Labs tab of Chart Review:

- The new statuses for clinic collect labs will display in Chart Review.
- Users can view the accession number in the report.

The screenshot shows the 'Chart Review' interface with the 'Labs' tab selected. The table below displays lab results with columns for Date/Time, Test, and Status. A red box highlights the 'Status' column. The patient information sidebar on the right includes the Northwestern Medicine logo, patient name (Zztest, Kurt), MRN (111011393646), DOB (8/29/1988), Sex (M), and Visit date (10/7/2020). Below this, the location is listed as NM Family Medicine, 10003 US Route 30, Waterman IL 60556-7128. The lab report title is 'Comp Metabolic Panel' with the accession number '20CD-281C00002' highlighted in yellow and the order number '1163699881'.

Date/Time	Test	Status
Today		
Today at 12:27	Lead, 24hr Urine	Needs to be Collected
Today at 12:18	CBC with Differential	In process
Today at 12:07	Comp Metabolic Panel	In process
1 Year Ago		
06/11/2019 12:54	Comp Metabolic Panel	Future
06/11/2019 12:54	CBC with Differential	Future
06/07/2019 11:44	Comp Metabolic Panel	Future
06/07/2019 11:44	CBC with Differential	Future
04/03/2019 07:19	Comp Metabolic Panel	Pending
04/03/2019 07:19	CBC with Differential	Pending