

Test Requesting in Vision

Sunquest/ICE Integration

INPS



Table of Editions and Contents

Date	Version	Contents	Output
21.11.08	280-2001	Merge of separate test requesting documents into one dual compliant document. ESTU	PDF
01.12.08	280-2004	JTHO	pdf
24.03.09	280-2005	Revision of Dual Document to Individual Provider Document. HJOH	Pdf
06.11.09		Change to URL details at request of ICE. Changed to new template. ESTU	.PDF

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Electronic Test Requesting

Overview

Electronic test requesting provides an integrated link directly from the patient record in Consultation Manager to the laboratory system via a secure NHSNet connection. Vision is currently integrated with the Sunquest (ICE) requesting system. The integrated test requesting functionality allows for:

- The request details to be recorded on the patient record.
- The request and/or specimen details to be updated after they have been sent.
- Immediate access to patient results.
- The ability to view outstanding requests.

Other benefits of integrated electronic test requesting:

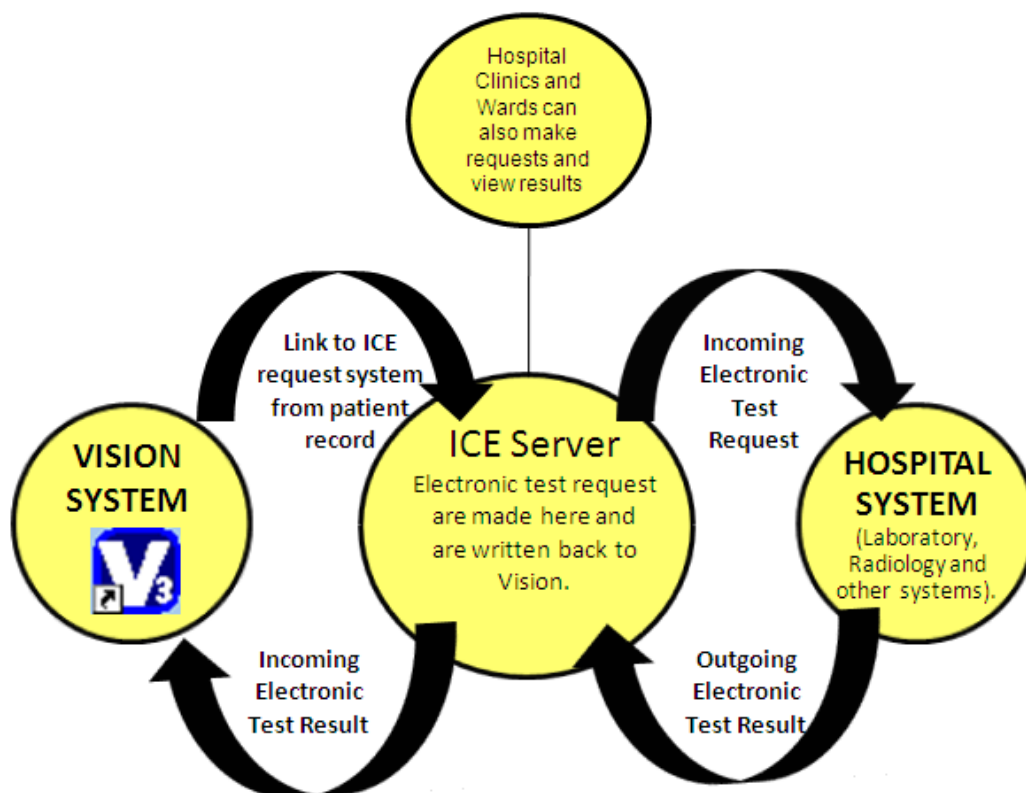
- There is no longer a need to re-key/write out demographic data for each test request.
- There will be a reduction in errors and mismatches when the result comes back.
- It reduces the need to chase results from the laboratory.
- There will be an improvement in data quality as the patient record is more up-to-date.
- Reduction/cessation of ordering duplicate test requests.

Note - Your Hospital Trust is responsible for delivering your Sunquest test requesting integration. Please liaise with them to arrange installation or with any queries regarding your Requesting System outside of the Vision software. On instruction from Sunquest, INPS will remotely enable the software at each practice in a timely and controlled manner.

Workflow Overview

The network and request workflow process for test requesting with Vision is as follows:

Network Workflow



Workflow between Vision, Test Requesting System and Hospital System

Request Workflow

- Go to **Add - Requests – Electronic Requests**. Then link to the test requesting interface.
- Make test request and print the details. Affix specimen to the printed request. **OR** make the test request, but leave the sample collection details to be entered at a later date.
- **The details are copied back to the request form in Vision and are saved to the Journal.**

Setting up

Switching On

The integrated test request functionality is delivered from DLM 280. Your Hospital Trust is responsible for delivering your Sunquest test requesting integration. Please liaise with them to arrange installation or with any queries regarding your Requesting System outside of the Vision software. On instruction from ICE, INPS will remotely enable the software at each practice in a timely and controlled manner. Once this has been done, you will need to ensure that your Trust:

- Sets up the required Provider(s) in Control Panel – Test Request.
- Has provided you with staff accounts details.

Note - It is advisable to liaise with your Trust and provide them with a list of Clinicians and non-Clinicians who want to use the service before go live.

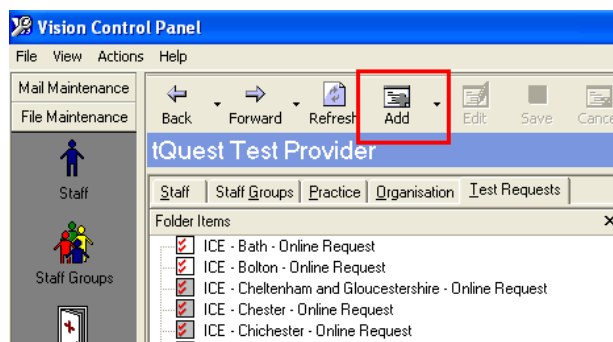
Vision supports the following services for ICE:

- **Order Test** –make a request.
- **Update Test** – edit a request.
- **Update Sample** – record sample collection for an existing request.
- **View Incomplete Tests** – view the status of previous requests.
- **Patient Report List** – audit requests.

Adding Providers

Firstly, you need to add the provider(s) which you intend to use for electronic test requesting. This is done from Test Requests in Control Panel and is usually added by your Hospital Trust. The provider URL, Provider Type and Organisation Code must be entered.

1. From the Vision front screen, go to **Management Tools - Control Panel**.
2. Select **File Maintenance** and click on the **Test Requests** icon.
3. Click on **Add**.



4. Complete the Provider-Add form.

The screenshot shows a form titled "Add New Provider Form" with the following fields and callouts:

- Description:** ICE Test Provider. Callout: "Description – Name of Provider."
- ProviderType:** ICE. Callout: "Provider Type - Select ICE."
- Organisation Code:** AHSL1. Callout: "Organisation Code can be obtained from your Trust."
- Logon URL:** http://www.icedesktop.com/icedesktop/dotnet/ws/Ahsl.Ic. Callout: "Complete Login URL, details will normally be provided by your Trust."
- Requester URL:** (empty). Callout: "The Requestor URL should not be completed for ICE providers."

Buttons: OK, Cancel

- **Description** is where you can input the name of the Provider.
- **Provider Type** – select ICE.
- **Organisation Code** - provided by your Trust.
- **Logon URL** – provided by your Trust and appears in one of the following two formats.

For HTTP:

<http://x.x.x.x/ICEDesktop/dotnet/ws/ahsl.ice.webservices.asmx>

(where x.x.x.x is the IP address of the ICE Web Server at the Trust)

For HTTPS:

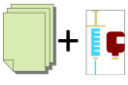


<https://DNSname/ICEDesktop/dotnet/ws/ahsl.ice.webservices.asmx>

- **Requestor ID** – Leave blank.
5. Click OK to save changes. The provider details are added to the list in the Test Request Pane in Control Panel.

Note - You can also set up practice login details from Control Panel. See "Add Practice Login Details on page 15."

Creating an Electronic Test Requests

Electronic test requests are generated in Consultation Manager from the Electronic Requests form. From here, you can link to the ICE test requesting system. There are various scenarios in which you can apply electronic test requesting, you can either:

-  Record the full request and sample collection details, (you would also follow this method if samples are collected by an external hospital phlebotomist, for example) **OR**
-  Record the request only (for instance, when allowing another member of staff to record the sample collection details). (ie, the GP can add a request and the practice nurse can collect the sample and update the request).
-  Record the sample collection details for a previously generated request.

All request and sample collection details are written back to the patient record. You can edit and view the requests and sample details at any time.

Recording a Test Request

Electronic test requests are generated in Consultation Manager from the Electronic Requests Form. From here, you can link to your laboratory(s) ICE test requesting system.

1. In Consultation Manager, select the patient and open a consultation.
2. Go to **Add - Requests - Electronic Requests**.
3. At the **Electronic Test Requesting - Select System and Account** screen, select the request system and provider you would like to use and enter your login details:

Test Request System and Service – Select the required test request interface and provider.

- **Show All** – when ticked, this allows you to select from the full list of providers on your system.
- **Default** – when ticked keeps the current provider as the default option. This is a per user setting.

Select Service – lists the possible services that your test request interface offers. This defaults to Order Test for new requests and Update Test when editing.

Enter personal Account Details – Enter the user name and password which is normally provided by your Hospital Trust. See also Add Practice Login Details on page 15.

Note – The User Name and password to login to the ICE system are normally the same.

Enter personal account details

Save Details – allows you to select from the following account options:

- - Save these details for my own personal use.
- - Allow these details to be used by all practice members
- - Do not save details (prompt me on each access)

Save Details

4. Click OK to login to the chosen request system. Patient Demographic information is uploaded onto the test request system when you connect, saving the need to search for the patient again on the ICE system.

Example of ICE Test Requesting Interface

Note - ICE website pages can be customised (for example, by the Hospital Trust) and you are referred to their respective local training and user guides for details on how to use their specific test requesting web pages.

The Patient Demographics are uploaded from Vision and matched in the ICE system.

Patient Name: **Mr PATRICK AARON** Hospital No.: **ICE1160** Sex: **Male** GP Practice: **GP Practice**
 Date of Birth: **21 September 1974** NHS no: **571 627 9821**
 Address: **59 Hammond Court South Street, Leeds, Z99 9ZZ** Telephone No: User: **G9999998**

Services: GP - REQUEST PANEL Routine Tests Micro Histology Radiology Plain film Radiology Specials US/MRI Blood Transfusion Example rules JRS personal panel

Main chem/haem Other chem/haem Urines/fluids Search Set as Default Panel

<input type="checkbox"/> Urea/Electrolytes	<input type="checkbox"/> HbA1c	<input type="checkbox"/> Anticardiolipin / lupus
<input type="checkbox"/> Liver Function	<input type="checkbox"/> Ferritin	<input type="checkbox"/> Coagulation Screen
<input type="checkbox"/> Bone Group	<input type="checkbox"/> FSH	<input type="checkbox"/> Heparin Monitoring
<input type="checkbox"/> Total CK	<input type="checkbox"/> Prolactin	<input type="checkbox"/> INR
<input type="checkbox"/> Thyroid Profile	<input type="checkbox"/> Cortisol	<input type="checkbox"/> Lipoproteins
<input type="checkbox"/> Urate	<input type="checkbox"/> Digoxin	<input type="checkbox"/> Iron / TIBC
<input type="checkbox"/> Magnesium	<input type="checkbox"/> Calcium	<input type="checkbox"/> Iron / TIBC
<input type="checkbox"/> Immunoglobulins	<input type="checkbox"/> Amylase	<input type="checkbox"/> Random Glucose
<input type="checkbox"/> Random Cholesterol	<input type="checkbox"/> Alpha - 1 - Antitrypsin Phenotype	<input type="checkbox"/> Alcohol
<input type="checkbox"/> Lipid Profile	<input type="checkbox"/> Albumin	<input type="checkbox"/> Fasting Glucose
<input type="checkbox"/> Serum Damolality	<input type="checkbox"/> CRP	<input type="checkbox"/> Blood Count
<input type="checkbox"/> Copper	<input type="checkbox"/> Iron / TIBC	<input type="checkbox"/> ESR
<input type="checkbox"/> Caeculeplaxim	<input type="checkbox"/> Random Glucose	<input type="checkbox"/> Zinc
<input type="checkbox"/> Protein Electro/Cryoglob	<input type="checkbox"/> Alcohol	<input type="checkbox"/> Cardiac Markers
<input type="checkbox"/> LH	<input type="checkbox"/> Fasting Glucose	

Most recent requests made for this patient: To view all requests for this patient, [click here](#).
 To view records of the tests on this panel only made for this patient, [click here](#).

Requested	Investigations	Priority	Loc	Ordered	Status
15 Jul 2008 14:56:24	Urea/Electrolytes	Normal	EMIS99	G9999998	REQ
15 Jul 2008 14:52:07	Urea/Electrolytes	Normal	EMIS99	G9999998	REQ

Continue with request...

ICE Order Screen

5. From the test request interface, you can choose to:
 - Complete a request only - which allows you or, for example, the nurse, to record sample collection at a later date,
 - Complete a request and record sample collection at the same time.

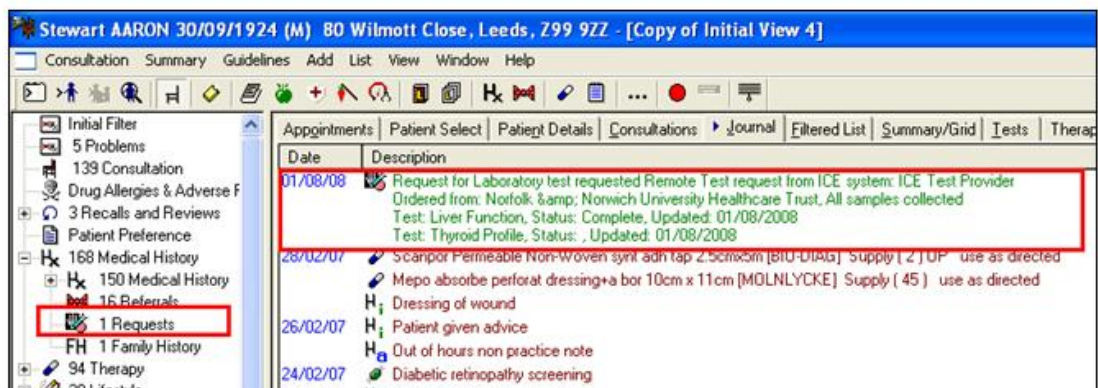
Note - You can request multiple samples within one test request.

6. Once your request has been made, you are taken back to Consultation Manager to the Request SDA. If you have printed labels in ICE while making the request, there is no need to click on the Labels button within Vision.
7. You can see that the request has been recorded, for example, in the Journal. The following details are saved:
 - **The date of the request.**
 - **Clinician.**
 - **Read term for request.** All requests have the Read code 413..00 -Laboratory Test Requested, although you are able to manually change this Read code if required.
 - **Urgency** (routine or urgent).
 - **Other details** including test request system, provider, sample description, sample status, date sample was updated are added to the details section of the Requests form.

Note - The Details field should not be changed manually as this field is maintained by Vision and any manual changes may be lost.

Viewing Electronic Test Request Records

Existing test requests can be listed from the Medical History category of the navigation pane under Requests.



Test Request Entry in Consultation Manager

Recording Sample Collection

Often a GP will make a test request, for the sample to be taken at a later time by the practice nurse.

To record that a sample has been collected for a previously recorded request:

1. Find the previous request from the navigation pane, under History, or look in the Journal.
2. Right click on the request and select **Edit**.
3. From the **Requests – Update** screen, click on the **Order** button.
4. Select the provider and fill in any login details if necessary. The Select Service defaults to Update Test. Click OK.
5. You are taken to the test request system where you can record that the sample has been collected and print the request and sample details.
6. Next, you are returned to the open Request - Update form. The details of the sample collection are copied into the Details section, which should not be changed manually as this field is maintained by Vision and any manual changes may be lost.
7. You are advised to update the **Date Specimen taken** field.
8. Click OK.

The screenshot shows the 'Requests - Update' form with the following fields and values:

- Date of Request:** 05 September 2008
- Clinician:** Dr Carol Neptune
- Private:**
- In Practice:**
- Read Term for Request Reason:** 413.00 Laboratory test requested
- Urgency:** Routine
- Date specimen taken:** 05 September 2008

Provider:

- Unit:**
- Department:** <None>
- Consultant:** <None>
- NHS Specialty:** <None>
- HB Specialty:** <None>

Details:

Remote Test request from ICE system: ICE Test Provider
Ordered from: Norfolk & Norwich University Healthcare Trust: All samples collected
Test: Urea/Electrolytes, Status: Complete, Updated: 05/09/2008

Editing a Test Request

You can append to or edit an existing ICE test request via Consultation Manager. Any changes made in the ICE interface are automatically logged in the patient record.

1. Find the existing test request. Requests can be accessed from the Navigation Pane under **Medical History – Requests** or in the Journal.
2. Right click on the request and select **Edit**.

Requests - Update [Recall] [Letter] [Order] [Label] [Default] [OK] [Cancel] [Help]

Date of Request: 05 November 2008 Clinician: Dr Carol Neptune Private Read Term for Request Reason: 413.00 Laboratory test requested Urgency: Routine Date specimen taken:

Provider:

Unit: Department: <None> Consultant: <None>

NHS Specialty: <None> TP Specialty: <None>

Details:

Remote Test request from ICE system: ICE Test Provider
Priority: non-urgent
Ordered from: Norfolk & Norwich University Healthcare Trust, No samples collected
Test: Urea/Electrolytes, Status: Complete, Updated: 05/11/2008

3. From the **Requests – Update** screen, click on the **Order** button.
4. Select the provider and fill in any login details if necessary. The **Select Service** defaults to **Update Test**. Click OK.
5. This opens the previously created request.
6. Once you have made your editions and exit the test request system, the details are saved back to the **Request – Update** form in Consultation Manager.

Deleting Electronic Test Requests

Once you have made a request, you can delete individual or all tests within a request. This must be done from the ICE interface via the corresponding request form. The request form in Consultation Manager is updated to reflect any deletions made in ICE.

Warning – If you delete an entire request form in Consultation Manager this does **not** in turn delete the request from the ICE interface.

If part of a request is deleted, the Journal entry is updated automatically to show a status of Cancelled. There is no need to delete the Journal entry.

If one test is cancelled in a multi-test request, the Journal entry will be updated automatically to mark that specific test as cancelled. In this case, it is most important that the Journal entry should **not** be deleted.



The above screenshot shows three test requests.

1. In the first request, the Albumin and ANA tests have been cancelled. This Journal entry must not be deleted because other tests (Ferritin and Iron) are still active.
2. The second request has been completely cancelled. Although this Journal entry could be deleted, it is advisable to leave it for audit purposes.
3. The third request consists of two orders (or samples). One of the orders has been cancelled. This Journal entry must not be deleted because the other order is still active.

Reports

View Incomplete Tests

You can look at previous test requests for an individual patient. You are able to tell by the status of the request whether the result is ready, if the sample has been received or if the request is still outstanding:

1. Select the patient in Consultation Manager and open a consultation.
2. Select **Add – Requests – Electronic Requests**.
3. From the Select Services box, select **View Incomplete Tests**.

Electronic Test Requesting - Select System and Account

Please select the required Test Request system and service, then provide your account details below. For details of how to obtain account details and more information on Electronic Test Requesting please press Help.

Please select the Test Request system and service

ICE Test Provider Show All
 Default

Select Service:

Enter personal account details

User Name:

Password:

Reenter Password:

Save Details

Save these details for my own personal use
 Allow these details to be used by all practice members
 Do not save details (prompt me on each access)

View Incomplete Tests

4. Click OK to be directed to the relevant pages of the ICE system.

Patient Report List

From the Patient Report list you can audit and monitor your test requests and results on a patient by patient basis.

1. Select the patient in Consultation Manager and open a consultation.
2. Select **Add – Requests – Electronic Requests**.
3. From the Select Services box select **Patient Report List**.

Electronic Test Requesting - Select System and Account

Please select the required Test Request system and service, then provide your account details below. For details of how to obtain account details and more information on Electronic Test Requesting please press Help.

Please select the Test Request system and service

ICE Test Provider Show All
 Default

Select Service: Patient Report List

Enter personal account details

User Name: G9999998

Password:

Reenter Password:

Save Details

Save these details for my own personal use
 Allow these details to be used by all practice members
 Do not save details (prompt me on each access)

Patient Report List

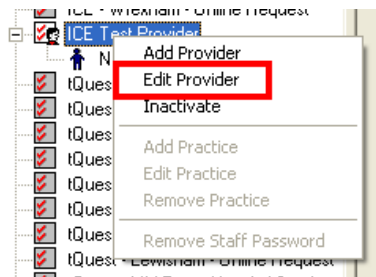
4. Click OK to be directed to the relevant pages of the ICE system.

Changing Provider Details

Editing Providers

If you need to change the details of a provider, i.e. if the provider changes their URL/logon ID:

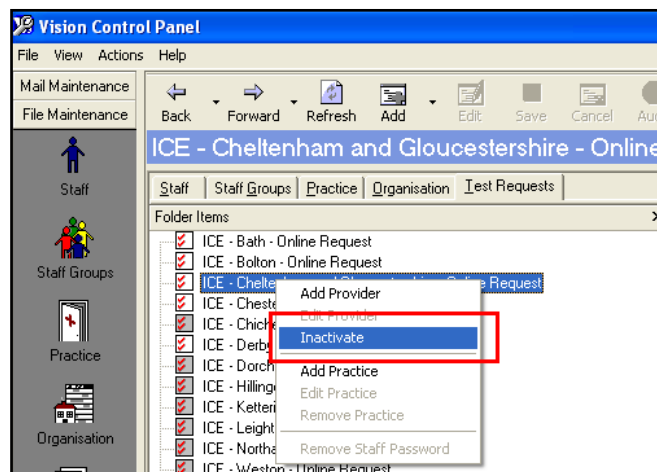
1. From the Vision front screen, go to **Management Tools - Control Panel**.
2. Select **File Maintenance** and click on the **Test Requests** icon.
3. Right click on the provider you would like to change and select **Edit Provider**.



4. On the Provider Form, make the necessary changes, and click OK to save.

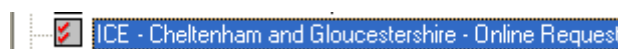
Inactivating Providers

1. To inactivate a provider, right click on the required provider and select **Inactivate**.



Inactivate Providers

2. The inactive provider remains in the list but displays a grey icon.

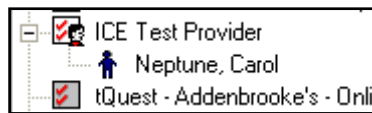


Managing ICE Login Details

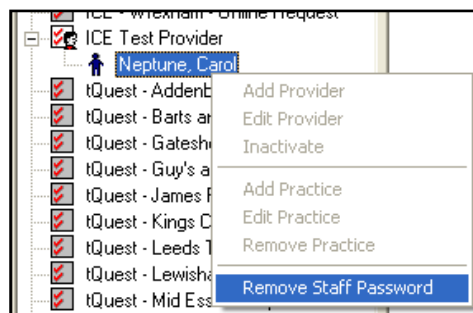
Resetting Passwords

You can reset an ICE password **from Control Panel – Test Requests**. You might need to do this, for instance, if a user has opted to save their password details on the Select System and Account screen in Consultation Manager, but has saved the wrong password details.

1. Go to **Management Tools - Control Panel**.
2. Select the **Test Requesting** icon.
3. Click on the plus \oplus next to the provider for the failed login to view a list of the staff listed to use this provider.



4. Right click on the failed login user, select **Remove Staff Password**.



Remove Staff Password

5. You can enter a new password when you next attempt to login to ICE from Consultation Manager.

Remember – The User Name and Password for logging into the ICE system are normally the same.

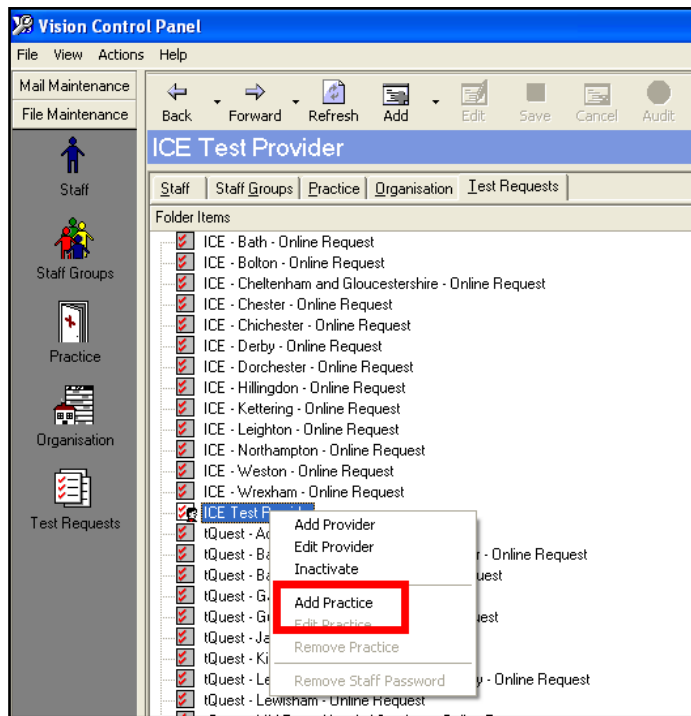
Add Practice Login Details

You can either add a practice login details in Control Panel for a Test Request provider, or you can create either a user or practice login when making a test request in Consultation Manager.

Either each user has their own login details or there can be one login access per practice. Adding a practice login lets any practice member make a test request. The audit trail is traced through the Vision login details.

The right menu option of **Add practice** is available only if there are no user records for this provider (either practice or staff). It allows the user to enter the username and password in order to create a user record.

1. Go to **Management Tools - Control Panel**.
2. Select the **Test Requesting** icon.
3. Right click on the **Test Request Provider** and select **Add practice**.



Add Practice

4. User Name and Password - Information you can get from your Trust.
5. Confirm the password and click OK to save.

