

Test Requesting in Vision

Indigo4/tQuest 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

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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 Indigo4 (tQuest) 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:

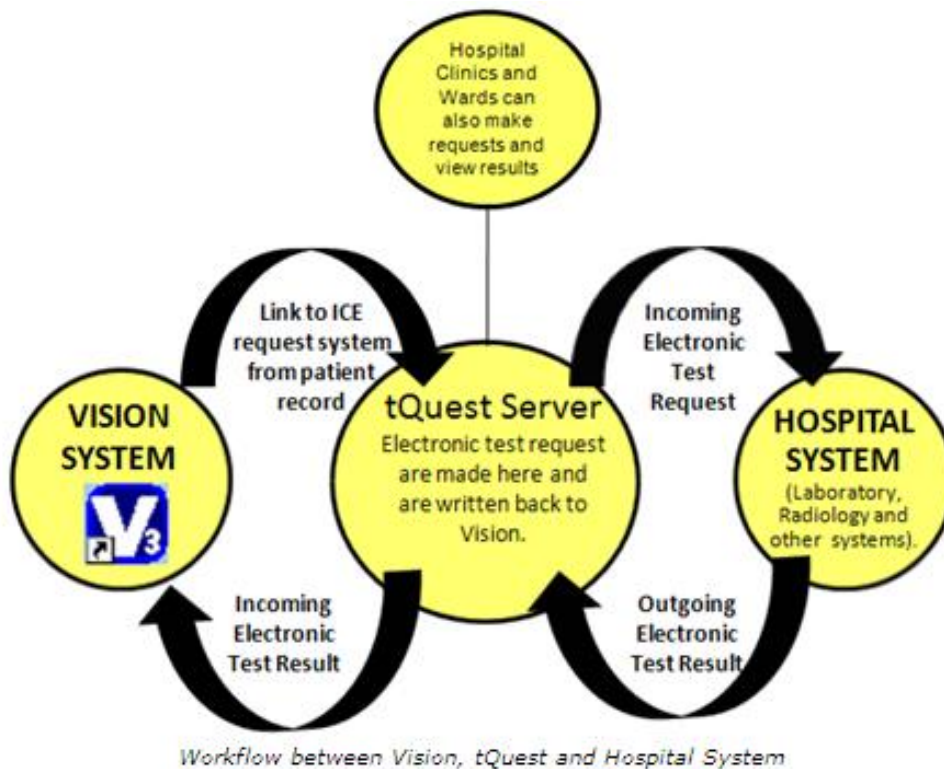
- There is no longer a need to re-key/write out demographic data for each test request.
- There will be a reduction in errors and mismatches when the result comes back.
- It reduces the need to chase results from the laboratory.
- There will be an improvement in data quality as the patient record is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

Note - Your Hospital Trust is responsible for delivering your 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 Indigo4, 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



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 as part of DLM 280. Your Hospital Trust is responsible for delivering your 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 Indigo4, INPS will remotely enable the software at each practice in a timely and controlled manner. Once this has been done, you will need to:

- Add required provider(s) in **File Maintenance - Control Panel – Test Requests**.
- Make sure you have staff accounts details (provided by your trust).
- It is also advisable to liaise with your trust and provide them with a list of Clinicians and non-Clinicians who want to use the tQuest service before go live.

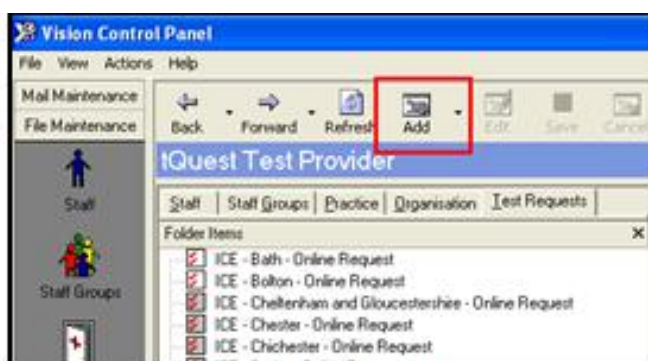
Please note that Vision supports the following tQuest systems:

- **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.
- **Access Administration** – system functions

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. You will need the requestor URL, Provider Type and Organisation Code which you can obtain from your trust.

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**.



Test Request - Add

4. Complete the Provider-Add form.

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

- Description** (Name of Provider): Test tQuest
- Provider Type**: tQuest
- Organisation Code**: AHSL1
- Logon URL**: (blank)
- Requester URL**: https://requesting.indigo4.net/tQuest/index.php

Callouts provide additional instructions:

- Provider Type** – Select tQuest. **Organisation Code** - can be obtained from your trust.
- The Login URL** should not be completed for tQuest Providers.
- Complete Requestor URL.** Details will normally be provided by your trust.

Buttons: OK, Cancel

Add New Provider Form

Description is where you can input the name of the Provider.

Provider Type – select Indigo4.

Organisation Code is provided by your trust.

Logon URL – Leave blank.

Requestor URL – is provided by your trust.

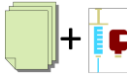


5. Click OK to save changes. The provider details are added to the list in the Test Request Pane in Control Panel. tQuest Test Provider



Test Request Providers

Creating an Electronic Test Requests

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

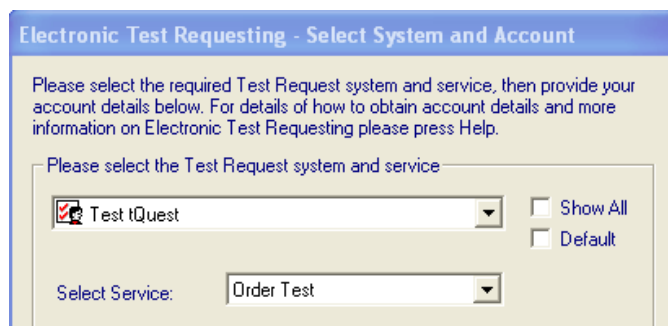
-  Record the full request and sample collection details, (you would also follow this method if samples are collected by an external hospital phlebotomist, for example) **OR**
-  Record the request only (for instance, when allowing another member of staff record the sample collection details). (i.e. 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) tQuest test request 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.

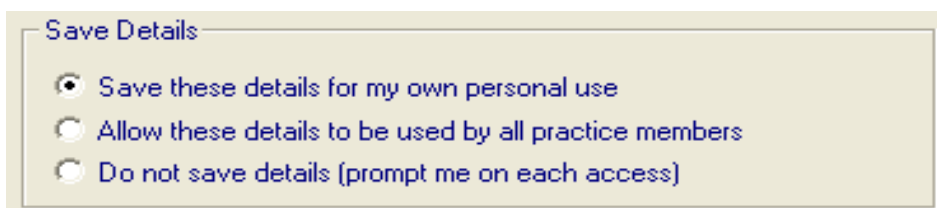
Select Service – lists the possible services that your test request interface offers. This defaults to Order Test for new requests and Update Test when editing.

User Name and Password – When you first use tQuest, your Vision user name is populated in the Test Request user name box. Click edit and change this to the User Name supplied by your Hospital Trust/Laboratory and then look at the save details options below. Passwords are not required.



Enter personal account details

Save Details You have three options for saving account details:



Save Details

- **Save these details for my own personal use** – saves the user name and password to your Vision user account. It is recommended that you select **Do not save details** the first time you attempt to login to tQuest. This is because Vision immediately saves these details which if incorrect, you will have to reset the tQuest password from Control Panel. See Resetting tQuest Passwords on page 15.
 - **Allow these details to be used by all practice members** – this option is used to accommodate generic tQuest accounts.
 - **Do not save details (Prompt me on each access)** – if you select this option, you will have to enter the username details each time you want to access tQuest.
4. From the test request interface, you can choose:
- Either to complete a request only - which allows you or, for example, the nurse, to record sample collection at a later date,
 - OR you can complete a request and record sample collection at the same time.
 - Note that you can request multiple samples within one test request.

5. Once your request has been made, you are taken back to Consultation Manager to the Request SDA. If you have printed labels in tQuest while making the request, there is no need to click on the Labels button within Vision.
6. 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).

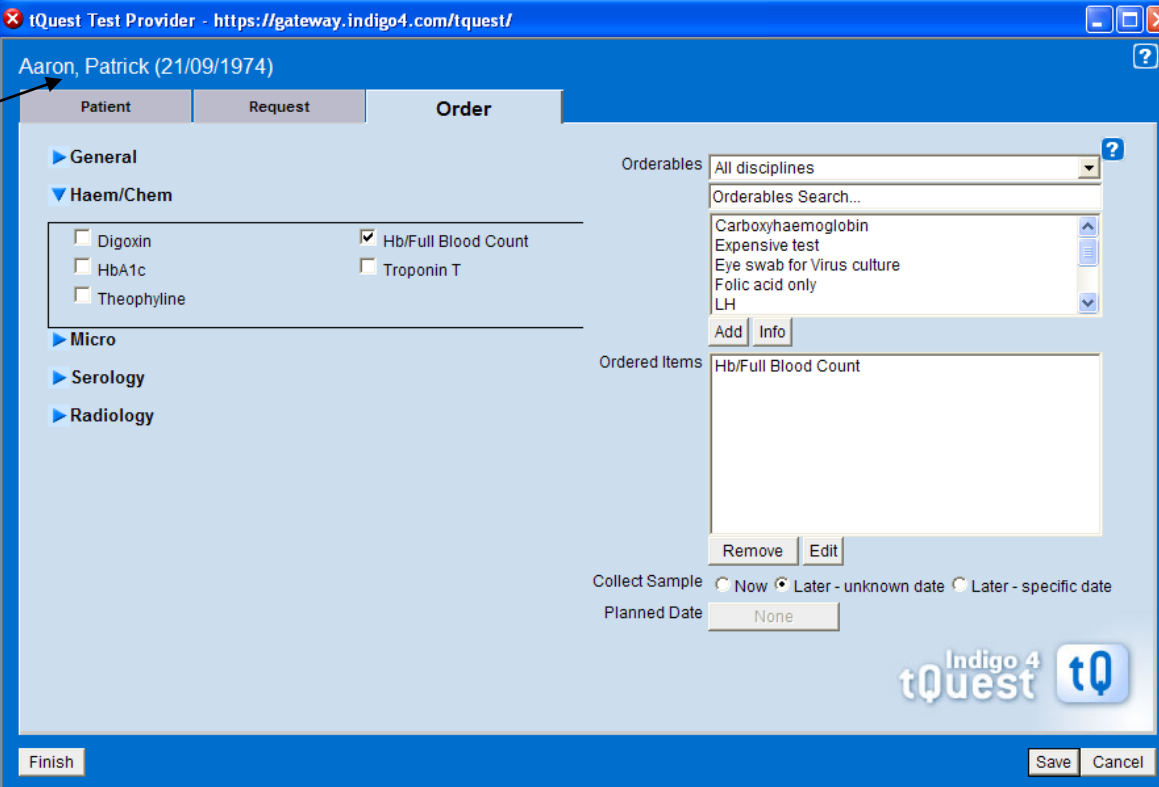
Other details including test request system, provider, sample description, sample status, date sample was updated are added to the details section of the Requests form.

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

Example of tQuest Test Requesting Interface

Note - The screenshots given here as examples may differ from those that display on your system.

The Patient demographics are uploaded from Vision and the Patient is found on the tQuest system.



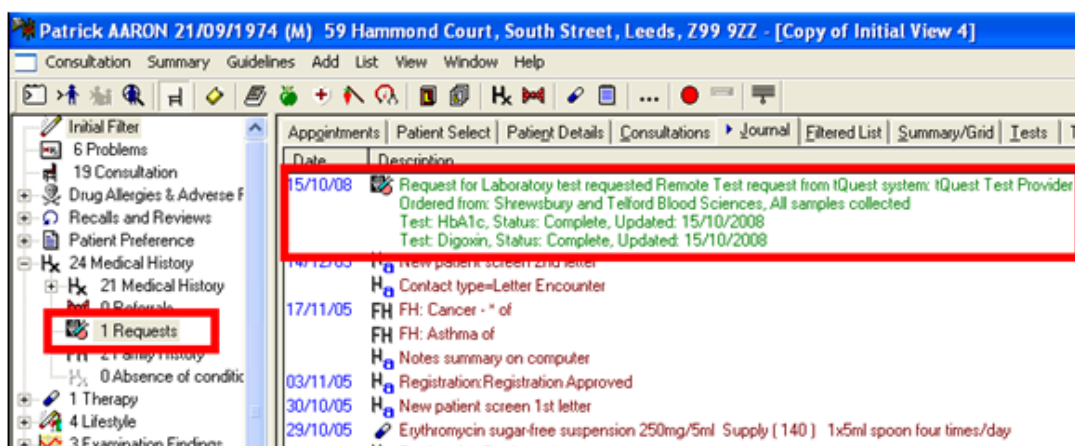
The screenshot displays the tQuest Test Provider interface for patient Aaron, Patrick (21/09/1974). The interface is divided into three tabs: Patient, Request, and Order. The Patient tab is active, showing a navigation menu on the left with categories: General, Haem/Chem, Micro, Serology, and Radiology. Under the Haem/Chem category, there are checkboxes for Digoxin, HbA1c, Theophylline, Hb/Full Blood Count (checked), and Troponin T. On the right, there is an 'Orderables' section with a dropdown menu set to 'All disciplines' and a search box. Below the search box is a list of orderables including Carboxyhaemoglobin, Expensive test, Eye swab for Virus culture, Folic acid only, and LH. There are 'Add' and 'Info' buttons below this list. The 'Ordered Items' section shows 'Hb/Full Blood Count' with 'Remove' and 'Edit' buttons. At the bottom, there are radio buttons for 'Collect Sample' (Now, Later - unknown date, Later - specific date) and a 'Planned Date' field set to 'None'. The Indigo 4 tQuest logo is in the bottom right corner. A 'Finish' button is at the bottom left, and 'Save' and 'Cancel' buttons are at the bottom right.

tQuest Order Tab

Note tQuest 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 the test requesting web pages.

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.

Requests - Update Recall Letter Order Label Default OK Cancel Help

Date of Request: 16 October 2008 Clinician: Dr Carol Neptune Private: In Practice: Read Term for Request Reason: 413.00 Laboratory test requested Urgency: Routine Date specimen taken: 16 October 2008

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

NHS Specialty: <None> HB Specialty: <None>

Details:

Remote Test request from iQuest system: iQuest Test Provider
 Ordered from: Sheepsbury and Telford Blood Sciences: All samples collected
 Test: HbA1c, Status: Complete, Updated: 16/10/2008
 Test: Hb/Full Blood Count, Status: Complete, Updated: 16/10/2008

Editing a Test Request

You are able to edit requests that have already been made, for example, you might have forgotten to add specific notes to the request form.

1. Find the previous request from the navigation pane, for example, in the Journal or Medical History.
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: In Practice: 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.

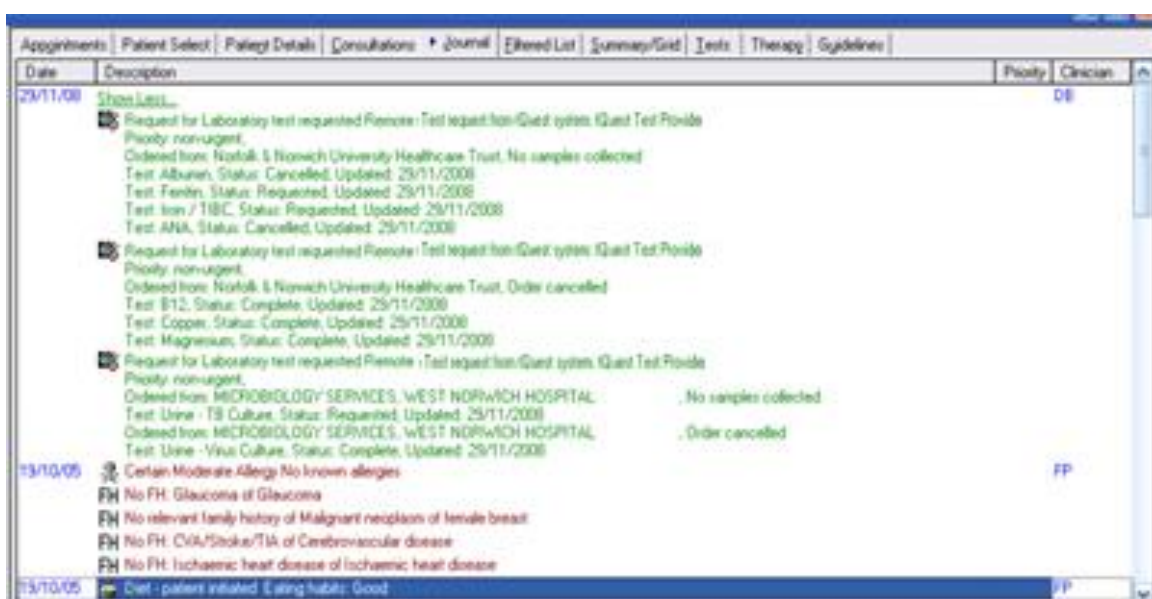
Deleting Electronic Test Requests

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

Note – If you delete an entire request form in Consultation Manager this does **not** in turn delete the request from the tQuest 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.

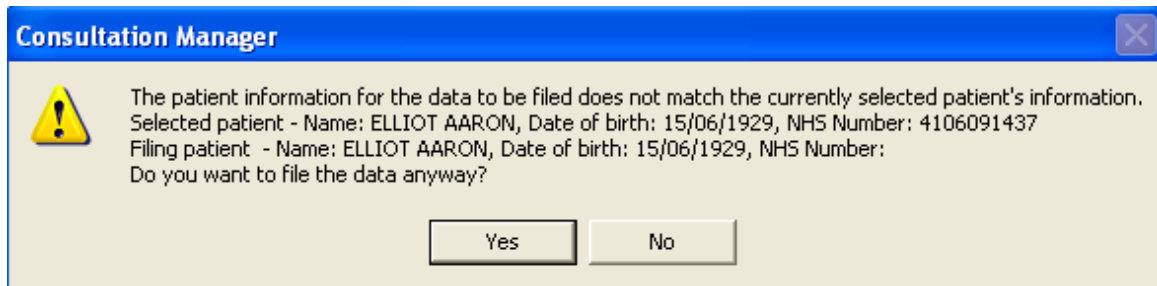


The above screenshot shows three test requests.

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.

Old Format NHS Numbers

The tQuest system does not process old format NHS numbers. If the patient you have created a request for only has an old format NHS number, the system returns a blank NHS number at the point of filing new information to the patient record. If this happens, you will be prompted with the following message: *The patient information for the data to be filed does not match the currently selected patient's information.....do you want to file it anyway?* Select Yes to continue, or No to cancel the filing of information on the patient record. This should not have a great impact on your system as old format NHS numbers are being phased out.



Reports

Viewing Incomplete/Complete Reports

You can view a list of all completed and incomplete/pending requests for **all** patients from the Access Administration screen.

1. From Consultation Manager, go to **Add – Requests – Electronic Requests**. There is no need to have a patient selected.
2. From the Select System and account screen, make sure the relevant provider is selected.
3. In the Select Services box, choose Access Administration and click OK to login to tQuest.

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

tQuest Test Provider Show All
 Default

Select Service: Access Administration

Enter personal account details

User Name: G9999998

Password:

Reenter Password:

Save Details

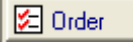
Save these details for my own personal use
 Allow these details to be used by all practice members
 Do not save details (prompt me on each access)

View Incomplete Tests

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

Reprinting Requests

You can also reprint a request form for a completed request from the Access Administration Screen.

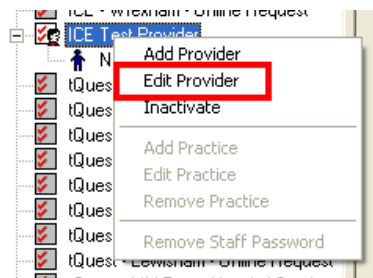
1. From Consultation Manager find the request you would like to reprint from the Navigation Pane from **Medical History - Requests**. Right click on the request and select Edit.
2. Next click on the Order button . The Select Services list displays **Access Administration**
3. Click OK to load the tQuest interface.
4. You are taken to the Complete tab in the tQuest administration screens, here you can see all completed requests for all patients. Locate the required request. You can double click on the request to see further information.
5. Once you have found the relevant request, click on the Reprint icon.
6. Press Print when prompted.
7. You are returned to the Request Update form in Consultation Manager. Click OK to close the Request-Update box.

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:

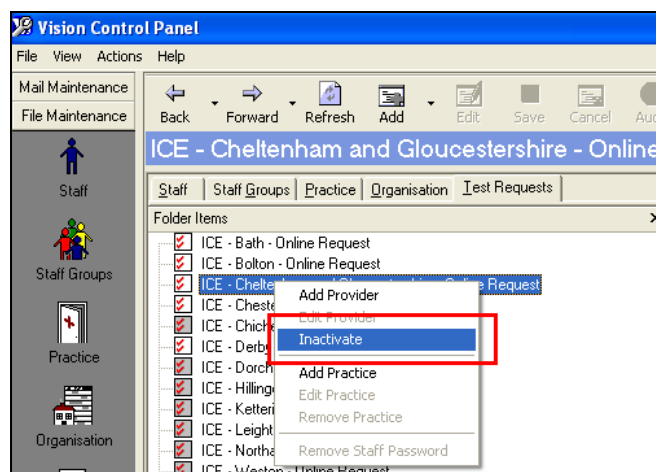
1. From the Vision front screen, go to **Management Tools - Control Panel**.
2. Select **File Maintenance** and click on the **Test Requests** icon.
3. Right click on the provider you would like to change and select **Edit Provider**.



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.

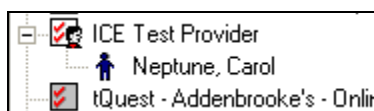


Managing tQuest Login Details

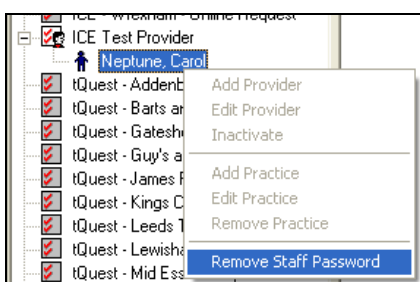
Resetting tQuest Passwords

As new users login to tQuest, their password details are logged in Control Panel – Test Requests. You can reset a tQuest password from here, for instance, you might need to do this 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 Requests** icon.
3. Click on the plus  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 tQuest from Consultation Manager.