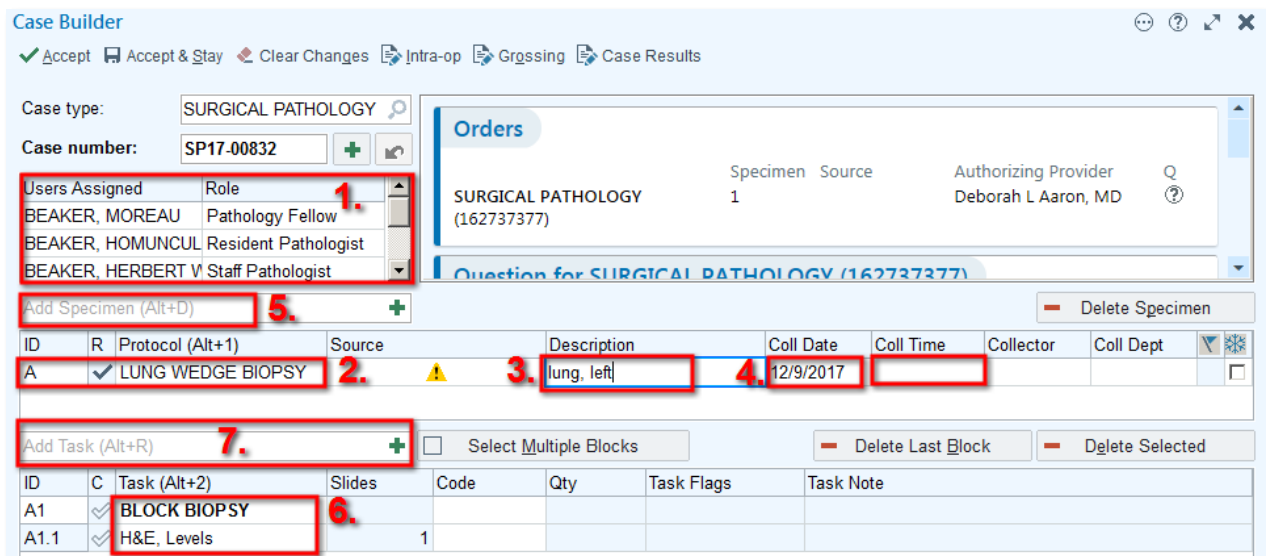# Surg Path: Accessioning Beaker AP Guide:

Creating a case for a OHSU Patient:

1. Go into 🏢 **Case Builder** to begin a case. You can enter it from the ⊙ **Actions** icon-> Case Builder. You can also find Case Builder as a link on your Dashboard or personalize your top menu to add a Case Builder button.

2. Scan in the specimen using the barcode reader. Click the **Accept** button. If this specimen does not have a case assigned previously, it will start a new case. If one exists, then it will open the current case for this specimen.

3. When the form is filled out, click 🏢 **Case Builder** button to begin processing the case. This will bring up a new window.
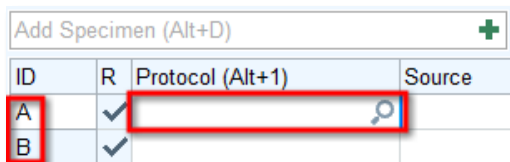
Create the case in Case Builder:

1. At the **User Assigned** and **Role** field, assign the appropriate people and roles. Some of the roles include Staff Pathologist, Resident Pathologist and Pathology Fellow.

Adding Specimens:

2. Depending on the # of specimens that were entered, Case Builder saves a row for each of those specimens. If no protocol is listed, click in the **Protocol** field directly for the row you want to assign a specimen. Do **not** use the **Add Specimen** field for these rows because it will add a new letter row.
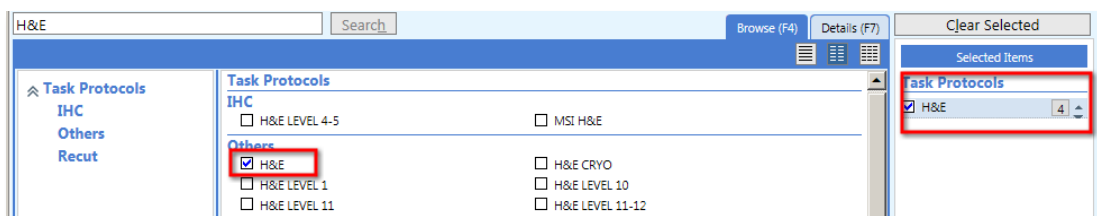

   a. In the **Protocol** field for Row A, type in part of the protocol name and press the Enter key. Select the protocol you would like to use. Do the same for each row that was auto created.

3. Type in a **Description**. Edit the description if something is misspelled or incomplete from the order here in this field

4. The Collection Date and Time should fill in automatically. Edit if you know that it is incorrect.

5. **Multiple Specimens:** If you need to add another specimen to the case on a new row, click in the **Add Specimen** field and choose the appropriate protocol. It will add new row to the specimen list.

Adding Tasks:

6. When you add specimens, certain default tasks will populate the bottom table. **Please check to make sure those tasks are correct!** If you have multiple specimens, click on each specimen's protocol row and the tasks associated with that specific specimen will show in the table below.

7. **To add more tasks:** Select the specimen or block that needs additional stains or tasks. In the **Add Task** field, search for the task protocol you want to add. Type part of the name and press Enter to narrow down the choices of tasks. This will bring up a Task Protocol Browser window and you can check off the tasks you want to add.

    a. If you would like to request Flow Cytometry on your specimen, type in "**flow**" in the Add Task field. Check off the the task "**Flow Cytometry Needed**". This will add the task "Flow Cytometry Requested" in the task list. This task requires a task note to let Flow know what you would like them to perform. See next section about adding Task notes.

    b. If you would like to order a flow sort on the case, type in "flow" in the Add Tast field. Check off the task "**FLOW SORT**". This will add the task "Flow Sort" in the task list. This task requires a task note to let Flow know what you would like them to perform. See next section about adding Task notes. Ex. "MRD Sort for FISH, IGH rearrangement"

    c. If you would like multiple copies of the same slide or test, after you choose a test in the task protocol browser, you can use the up and down arrows to increment the number of slides/tests requested.

Deleting Items:

If the case hasn't yet been accepted, deleting an item completely removes it from the case. If the case has already been accepted, the deleted item appears with a line through it to indicate that it doesn't need to be processed or performed and that charges won't be filed for it.

To see deleted tasks, click ▬ **Show Deleted** under the ☺ Actions button drop down list . If you deleted an item in error, select it and click ◄◄ **Restore.**

Adding Task Notes:

Sometimes you need to add a note to a task to add extra information. For example, if you order "Flow Cytometry Needed" or a "Flow Sort", the Flow techs need additional information to process the test.

1. To add a task note, the easiest way is to find the task in the Task list that you want to add a task note, and click on the grey field under the column **Task Note** for that row.

2. It will bring up the **Case Info** window. Type in the note you want to add for that particular task. Click the **Accept** button.

3. In Case Builder, you will see the task note listed.

Accessioning the Case:

1. When you are done, click ✔ **Accept** to accession the case.

 NOTE! If you entered Case Builder from Requisition Entry, you still need to accept the requisition after you accession the case in Case Builder! At the **Requisition Entry** screen, if you have additional requisitions to enter, click ✔ **Accept & New** to move to the next requisition. Otherwise, click the arrow next to ✔ **Accept & New** and select ✔ **Accept** to save your work and close Requisition Entry.

Creating a case for a Non-OHSU Submitter:

1. Use Chart Search to open **Requisition Entry** or find the link to **Requisition Entry** from your starting Dashboard.


2. Enter the submitter information in the **Submitter:** field. If this is a industrial account, search for the company name. If this is not an industrial account, contact Client Services or your surpervisor as to what should be entered in this field.

3. In the **Patient** field: Search for the patient name, with the format "Lastname, Firstname." Make sure to search for a pre-existing patient using multiple identifiers. If the patient does not exist in the database, the patient will need to be created.

4. Enter the outside submitter's case number in the **Ref. Lab No.** field. If the outside submitter's case number includes letters, do not include the specimen letters in this field.

5. Enter the diagnosis code in the **Code** field and authorizing provider in the **Authorizing provider** field.

6. In the **Bill to:** field: Some industrial accounts will default either Client or Patient billing. If this field is blank, then determine from the paperwork or from other sources whether this is a Client Bill or Patient Bill.

7. In the **Procedure** field, enter the test being performed. Type part of the procedure name and press Enter to open the Order Search window. When you choose a procedure, the specimen type and priority appear. If the procedure is not listed, you may have to click on the **Facility List** tab to see the full procedure list.
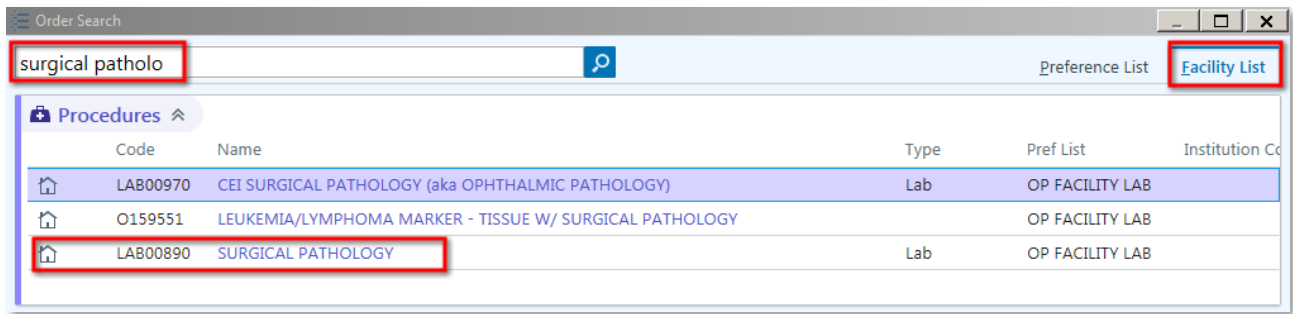
8. In the **# of Spec.** field: The default is 1**.** Change the number to correspond to what was sent.

9. In the **Priority** field, leave the default as "Routine".

10. If the procedure has order questions, there will be an question mark under the **Q** column. Click on this question mark icon and answer the appropriate questions.

11. To scan in the paper requisition/orders into Beaker, you can press the **Scan** button.

    a. Type in a description in the **Description** field.
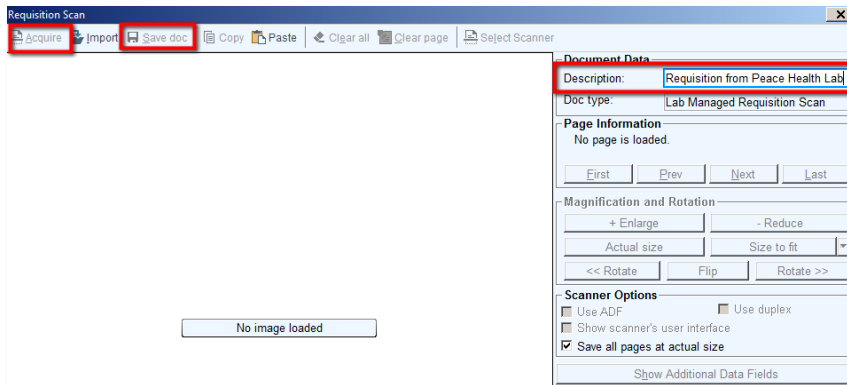
    b. Load the paper into the scanner, and click the **Acquire** button.

    c. Once the paper has been scanned, click on the **Save Doc** button.

12. When the form is filled out, click ▦ **Case Builder** button to begin processing the case. This will bring up a new window.

Create the Case in Case Builder for Req. Entry Cases:
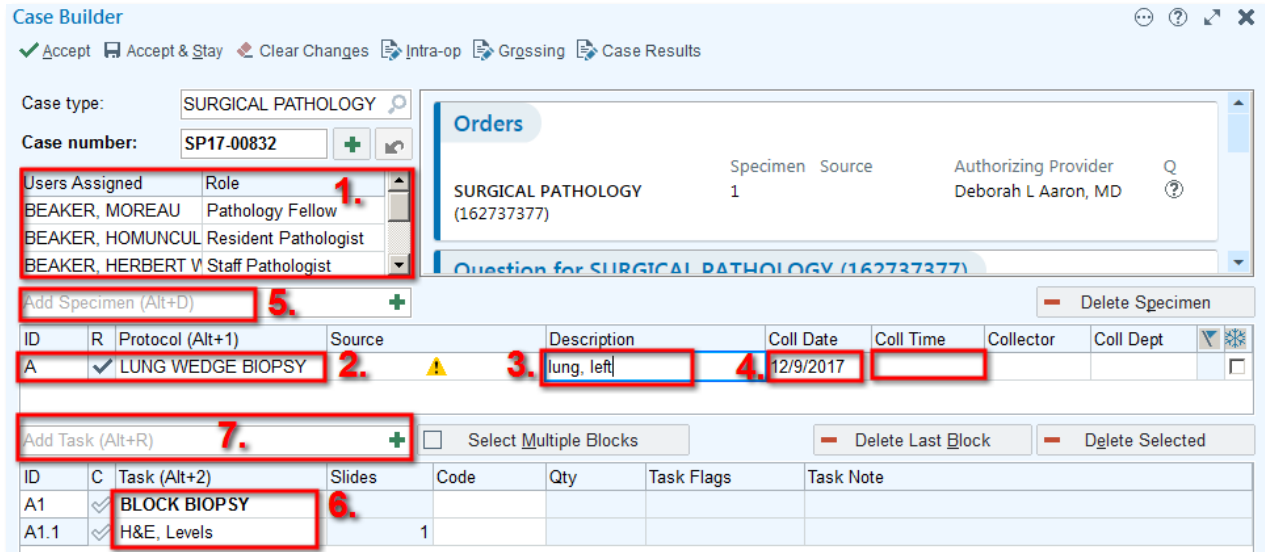
1. At the **User Assigned** and **Role** field, assign the appropriate people and roles. Some of the roles include Staff Pathologist, Resident Pathologist and Pathology Fellow.

Adding Specimens:

2. Depending on the # of specimens that were entered from Requisition Entry, Case Builder saves a row for each of those specimens. Click in the **Protocol** field directly for the row you want to assign a specimen. Do **not** use the **Add Specimen** field for these rows because it will add a new letter row.
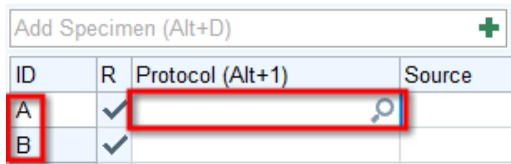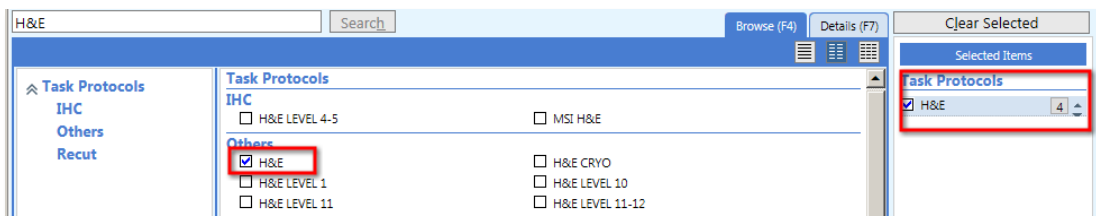

   a. In the **Protocol** field for Row A, type in part of the protocol name and press the Enter key. Select the protocol you would like to use. Do the same for each row that was auto created.

3. Type in a **Description**. Enter the source information or text comments from the order here in this field

4. Complete the collection information in the fields to the right. Enter the **Collection Date** and **Collection Time**. The Collection Time is important because if CP tests are ordered on a case, then CP Beaker requires a Collection Time to be filled out. If you don't know the time, put "n" for current time.

5. **Multiple Specimens:** If you need to add another specimen to the case on a new row, click in the **Add Specimen** field and choose the appropriate protocol. It will add new row to the specimen list.

Adding Tasks:

6. When you add specimens, certain default tasks will populate the bottom table. **Please check to make sure those tasks are correct!** If you have multiple specimens, click on each specimen's protocol row and the tasks associated with that specific specimen will show in the table below.

7. **To add more tasks:** Select the specimen or block that needs additional stains or tasks. In the **Add Task** field, search for the task protocol you want to add. Type part of the name and press Enter to narrow down the choices of tasks. This will bring up a Task Protocol Browser window and you can check off the tasks you want to add.

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Adding Task Notes:

Sometimes you need to add a note to a task to add extra information. For example, if you order "Flow Cytometry Needed" or a "Flow Sort", the Flow techs need additional information to process the test.

1. To add a task note, the easiest way is to find the task in the Task list that you want to add a task note, and click on the grey field under the column **Task Note** for that row.

2. It will bring up the **Case Info** window. Type in the note you want to add for that particular task. Click the **Accept** button.

3. In Case Builder, you will see the task note listed.

Accessioning the Case:

2. When you are done, click ✔ **Accept** to accession the case.

   NOTE! If you entered Case Builder from Requisition Entry, you still need to accept the requisition after you accession the case in Case Builder! At the **Requisition Entry** screen, if you have additional requisitions to enter, click ✔ **Accept & New** to move to the next requisition. Otherwise, click the arrow next to ✔ **Accept & New** and select ✔ **Accept** to save your work and close Requisition Entry.

Additional Tasks:

Adding "Rush" Case Flag:

If the case is a rush, then you need to enter a Case flag of "Rush".

1. Go into **Case Builder** for that case and click on the ⊙ **Actions** button and choose **Case Info**.
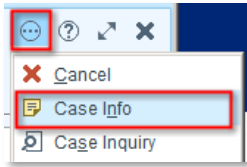
2. Make sure you are on the **Case** tab, and choose the "**RUSH**" flag. Click on the **Accept** button.
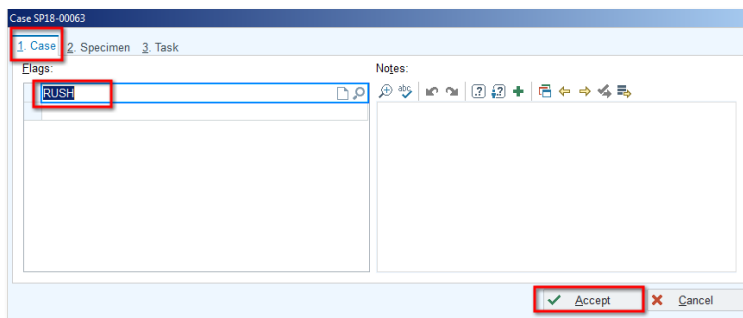
3. This will add a **RUSH** flag to the case. In the **Outstanding List** and **Case Prep Work List**, these cases will have a red background.

Printing out non-frozen specimen labels:

When you check in non-frozen specimens, the Beaker specimen label will not print automatically when you accession the case. To print a AP Specimen label:

1. In Case Builder, click on the ⊙ **Actions** button and choose **Labels and Docs**. (Alternatively, you can personalize your Case Builder tool bar to have the Labels and Docs as a button).
2. Select "**Label**" for the Document type:.
3. Click on the **Print New** option.
4. Choose "**OHSULAB AP Specimen Label**" by clicking on the magnifying glass next to the Print New Field.
5. Select your workstation printer for the Printer field.
6. Select "**1 per Specimen**" for the Copies field. Note: if you leave it on one per container, you will print a lot of erroneous extra labels!
7. In the Specimen field, choose the specimen you want to print. The settings should look like the following:

8. Click the **Print** button. The label should look like this:
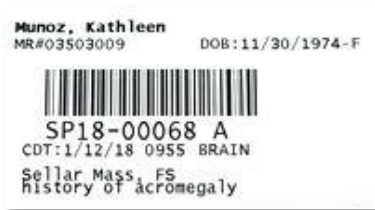
Reprinting Frozen Cassettes:

If you have to reprint a frozen specimen cassette:

1. In Case Builder, click on the ⚬⚬⚬ **Actions** button and choose **Labels and Docs**. (Alternatively, you can personalize your Case Builder tool bar to have the Labels and Docs as a button).
2. Select "**Block/Slide Etch**" for the Document type:.
3. Click on the **Print New** option.
4. Choose "**OHSUlab AP Label FRZ Cassette**" by clicking on the magnifying glass next to the Print New Field.

5. Select your workstation printer for the Printer field.
6. Select "**1 per Container**" for the Copies field.
7. In the Specimen field, choose the specimen you want to print.

8. In the Container field, choose the frozen block you are trying to reprint.

9. Press the **Print** button.

Scanning Order/Frozen Paperwork into Case Results:

1. Open the case in Case Results. To scan in any documentation into the case, click on the **Scan** icon on the middle toolbar of **Case Results**, and choose "**Scan Image**". Make sure you are on a workstation with a scanner attached to it.
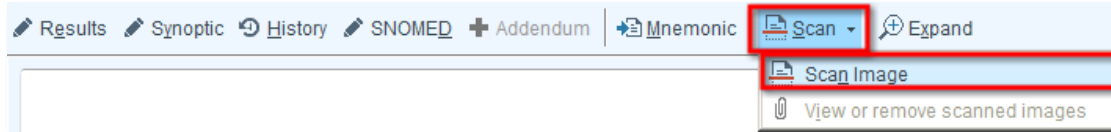
2. Type in some descriptive text in the Description field. Ex. "Frozen"
Click on the "**Acquire**" button. After the document has been scanned in, you should see the scan in the scan window. Click the **Save Doc** button when you are ready to accept the scan.

This guide is based on Epic 2017.