

dartOCM Administration Guide



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Scope

This document is designed to help guide administrators in the configuration and maintenance of dartOCM via the configuration pages. This document does not cover how to user dartOCM. For guidance on how to use dartOCM consult the dartOCM User Guide.

Revision History

Version	Date Revised	Revised By	Revision Notes
1	02/05/2008	Ian Hodges	Document created.
2	14/07/2008	Ian Hodges	Document updated for version 1.3.0.0.
3	22/08/2008	Ian Hodges	Document updated for version 1.3.1.0.
4	17/11/2009	Ian Hodges	Document updated for version 1.4.1.1.
5	12/01/2010	Ian Hodges	Document updated for version 1.4.1.7.
6	02/02/2010	Ian Hodges	Document updated for version 1.4.1.9.
7	18/02/2010	Ian Hodges	Document updated for version 1.4.2.1. LIMS Reports section added.
8	31/03/2010	Ian Hodges	Document updated for version 1.4.2.3.
9	07/06/2010	Ian Hodges	Document updated for version 1.4.2.7.
10	06/09/2010	Ian Hodges	Document updated for version 1.4.3.1.
11	21/01/2011	Ian Hodges	Document updated for version 1.4.3.3.
12	19/04/2011	Ian Hodges	Document updated for version 2.0.1.0.
13	02/06/2011	Ian Hodges	Document updated for version 2.0.3.0.
14	29/02/2012	Ian Hodges	Document updated for version 2.1.
15	14/01/2013	Ian Hodges	Document updated for version 2.7. Patient Categories Management added.
16	24/04/2014	Ian Hodges	Document updated for version 2.17.
17	01/05/2014	JAA	Document rebranded
18	09/06/2014	Ian Hodges	Document updated for version 2.19.
19	20/01/2015	Ian Hodges	Document updated for versions 2.21 and 2.23.

Favourite Test Management

Favourite Tests Overview

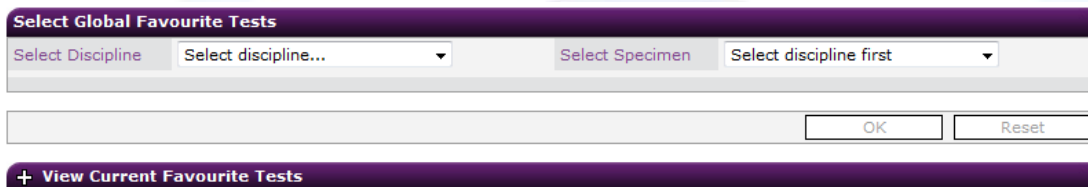
Favourite tests are tests that appear at the bottom of the request form when the user first enters the request screen and selects a discipline/type/site combination. This is make it unnecessary for the user to click 'Add Tests' and select the tests every time.

The favourite tests should only be populated with the most commonly requested tests. Favourites can be specified at three levels; global, location and user.

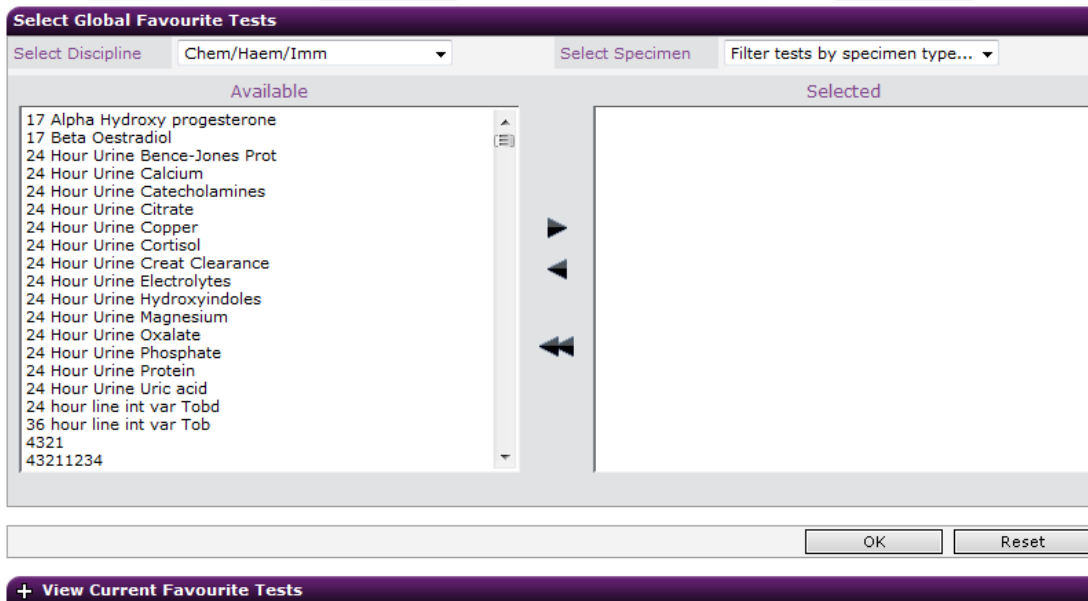
- Favourites configured at the global level are applied to every user of the system.
- Favourites configured at the location level are applied to all users at a particular location.
- Favourites configured at the user level are applied to a particular user only.

Global Favourites

When you first enter the 'Global Favourite Tests' screen, nothing is selected by default.



Selecting a discipline from the drop down will populate the form with tests associated with that discipline.



The 'Available' list shows tests that are available for adding to the global favourite tests. The 'Selected' list shows the tests that are currently configured as global favourites.

Double click a test to move it between lists or highlight and use the arrows. Click 'OK' once finished or 'Reset' to reset the form to the currently configured settings. The tests can be further filtered by specimen type by selecting it from the specimen type drop down.

Select Global Favourite Tests

Select Discipline: Chem/Haem/Imm Select Specimen: Blood

Available	Selected
24 Hour Urine Calcium	17 Alpha Hydroxy progesterone
4321	17 Beta Oestradiol
43211234	
5 A Dihydrotestosterone	
A Test With A Long Name That Should Wrap On To Two	
ACTH	
ANA (Hep2) Screen	
ANA (Hep2) Titre	
ANCA	
ANCA ELISA (MPO/PR3)	
ANCA Titre	
APTT correction studies	
APTT ratio	
APTT time and ratio	
AST	
AST	
Ab to meningococcal polysac Ab	
Acetylcholine Receptor Abs	
Adjusted Calcium	
Adrenal Antibodies	

Global Favourite tests updated successfully. OK Reset

+ View Current Favourite Tests

Below the lists is an expandable panel, which shows the currently configured favourite test.

- Hide Current Favourite Tests

Chem/Haem/Imm

Blood

- 17 Alpha Hydroxy progesterone
- 17 Beta Oestradiol

Breast DTO

- 17 Alpha Hydroxy progesterone
- 17 Beta Oestradiol

When the user makes a new request and selects 'Chem/Haem/Imm' and 'Blood' they will see the two tests at the bottom of the screen.

Requested Tests Add Tests Find Tests Add Test Group

17 Alpha Hydroxy progesterone 17 Beta Oestradiol

Clear Changes Save Save & Print New Request For This Patient

Location Favourites

Initially the 'Location Favourite Tests' screen shows nothing selected by default and the drop down and buttons are disabled.

Select Location Favourite Tests

Select Location: Select

Select Discipline: Select Specimen:

OK Reset

+ View Current Favourite Tests

In the 'Select Location' field start typing the name of the location that requires configuring. As you type a drop down will appear with a list of possible choices.

Select the desired location and click 'Select'. The drop down lists will be enabled if a valid location has been found. If the location name is invalid a message will inform the user of this.

Select Location Favourite Tests

Select Location

Select Discipline

+ View Current Favourite Tests

At this point you can expand the panel to view the currently configured favourite tests for that location.

- Hide Current Favourite Tests

■ = Inherited from global favourites. ■ = Excluded from global favourites.

Chem/Haem/Imm

Blood

- 17 Alpha Hydroxy progesterone
- 17 Beta Oestradiol

Breast DTO

- 17 Alpha Hydroxy progesterone
- 17 Beta Oestradiol

Currently there are only two favourite tests, which have been inherited from the global favourites.

Select a discipline from the drop down to show the lists.

Select Location Favourite Tests

Select Location

Select Discipline

Available	Selected
24 Hour Urine Bence-Jones Prot	17 Alpha Hydroxy progesterone
24 Hour Urine Calcium	17 Beta Oestradiol
24 Hour Urine Catecholamines	
24 Hour Urine Citrate	
24 Hour Urine Copper	
24 Hour Urine Cortisol	
24 Hour Urine Creat Clearance	
24 Hour Urine Electrolytes	
24 Hour Urine Hydroxyindoles	
24 Hour Urine Magnesium	
24 Hour Urine Oxalate	
24 Hour Urine Phosphate	
24 Hour Urine Protein	
24 Hour Urine Uric acid	
24 hour line int var Tobd	
36 hour line int var Tob	
4321	
43211234	
48 hour line int var Tob	
5 A Dihydrotestosterone	

The 'Available' list shows tests that are available for adding to the locations favourite tests. The 'Selected' list shows the tests that are currently configured as location favourites including favourites inherited from the global favourites.

Double click a test to move it between lists or highlight and use the arrows. Click 'OK' once finished or 'Reset' to reset the form to the currently configured settings. The tests can be further filtered by specimen type by selecting it from the specimen type drop down.

Select Location Favourite Tests

Select Location:

Select Discipline: Select Specimen:

Available	Selected
17 Alpha Hydroxy progesterone	17 Beta Oestradiol
24 Hour Urine Calcium	Blood Gases
4321	Carnitine
43211234	
5 A Dihydrotestosterone	
A Test With A Long Name That Should Wrap On To Two	
ACTH	
ANA (Hep2) Screen	
ANA (Hep2) Titre	
ANCA	
ANCA ELISA (MPO/PR3)	
ANCA Titre	
APTT correction studies	
APTT ratio	
APTT time and ratio	
AST	
AST	
Ab to meningococcal polysac Ab	
Acetylcholine Receptor Abs	
Adjusted Calcium	

Location Favourite tests updated successfully.

If an inherited favourite is removed from the 'Selected' list, it is no longer inherited for the selected location. The panel will be updated to reflect these changes.

Hide Current Favourite Tests

■ = Inherited from global favourites. ■ = Excluded from global favourites.

Chem/Haem/Imm	Blood	Breast DTO
17 Beta Oestradiol	17 Alpha Hydroxy progesterone	17 Alpha Hydroxy progesterone
Blood Gases		
Carnitine		

When the user makes a new request and selects 'Chem/Haem/Imm' and 'Blood' they will see the three tests 'Carnitine', 'Blood Gases', and '17 Beta Oestradiol', but not '17 Alpha Hydroxy progesterone'.

Requested Tests

Carnitine Blood Gases 17 Beta Oestradiol

To reinstate an excluded global favourite, find it in the 'Available' list and move it to the 'Selected' list.

User Favourites

When you first enter the 'My Favourite Tests' screen, nothing is selected by default. Changes in this screen will only affect the currently logged on user.

Select Favourite Tests

Select Discipline: Select Specimen:

+ View Current Favourite Tests

At this point the panel can be expanded to view the currently configured favourite tests for the logged on user.

Hide Current Favourite Tests

■ = Inherited from global favourites.
■ = Inherited from location favourites.

■ = Excluded from global favourites.
■ = Excluded from location favourites.

Chem/Haem/Imm

Blood

- 17 Beta Oestradiol
- Blood Gases
- Carnitine

Breast DTO

- 17 Beta Oestradiol
- Blood Gases
- Carnitine

Currently there are only three favourite tests, which have been inherited from the global favourites and location favourites. Select a discipline from the drop down to show the lists.

Select Favourite Tests

Select Discipline: Chem/Haem/Imm Select Specimen: Blood

Available	Selected
17 Alpha Hydroxy progesterone	17 Beta Oestradiol
24 Hour Urine Calcium	APTT ratio
4321	Carnitine
43211234	
5 A Dihydrotestosterone	
A Test With A Long Name That Should Wrap On To Two	
ACTH	
ANA (Hep2) Screen	
ANA (Hep2) Titre	
ANCA	
ANCA ELISA (MPO/PR3)	
ANCA Titre	
APTT correction studies	
APTT time and ratio	
AST	
AST	
Ab to meningococcal polysac Ab	
Acetylcholine Receptor Abs	
Adjusted Calcium	
Adrenal Antibodies	

Favourite tests updated successfully. OK Reset

The 'Available' list shows tests that are available for adding to the user's favourite tests and the 'Selected' list shows the tests that are currently configured as user favourites including favourites inherited from the global and location favourites.

Double click a test to move it between lists or highlight and use the arrows. Click 'OK' once finished or 'Reset' to reset the form to the currently configured settings. The tests can be further filtered by specimen type by selecting it from the specimen type drop down. If an inherited favourite is removed from the 'Selected' list it is no longer inherited for the logged on user. The panel will be updated to reflect these changes.

Hide Current Favourite Tests

■ = Inherited from global favourites.
■ = Inherited from location favourites.

■ = Excluded from global favourites.
■ = Excluded from location favourites.

Chem/Haem/Imm

Blood

- 17 Beta Oestradiol
- APTT ratio
- Carnitine

Breast DTO

- 17 Beta Oestradiol
- APTT ratio
- Carnitine

Chem/Haem/Imm

Blood

- Blood Gases

Breast DTO

- Blood Gases

When the user makes a new request and selects 'Chem/Haem/Imm' and 'Blood' they will see the three tests 'Carnitine', 'APTT ratio', and '17 Beta Oestradiol', but not 'Blood Gases'.

Requested Tests Add Tests Find Tests Add Test Group

APTT ratio Carnitine 17 Beta Oestradiol

To reinstate an excluded global or location favourite, find it in the 'Available' list and move it to the 'Selected' list.

Test User Type Assignment

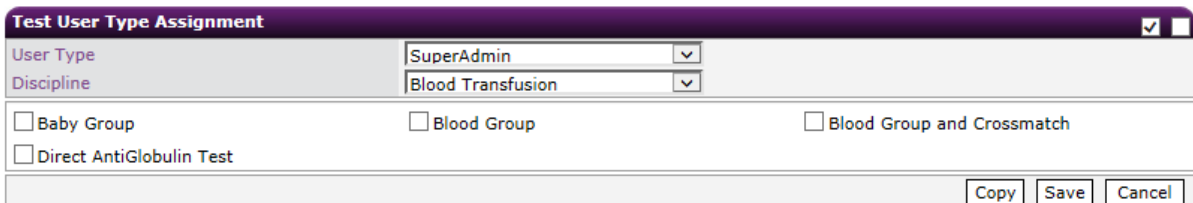
Overview

The availability of tests to users of a particular user type can be managed via the Test User Type Assignment screen.

Configuring Test User Type Assignments

By default all the tests across all disciplines are unchecked for a user type. This actually means that the user can see all the tests, the same as if every test across all disciplines were selected.

Nothing selected across any discipline:



Test User Type Assignment

User Type: SuperAdmin

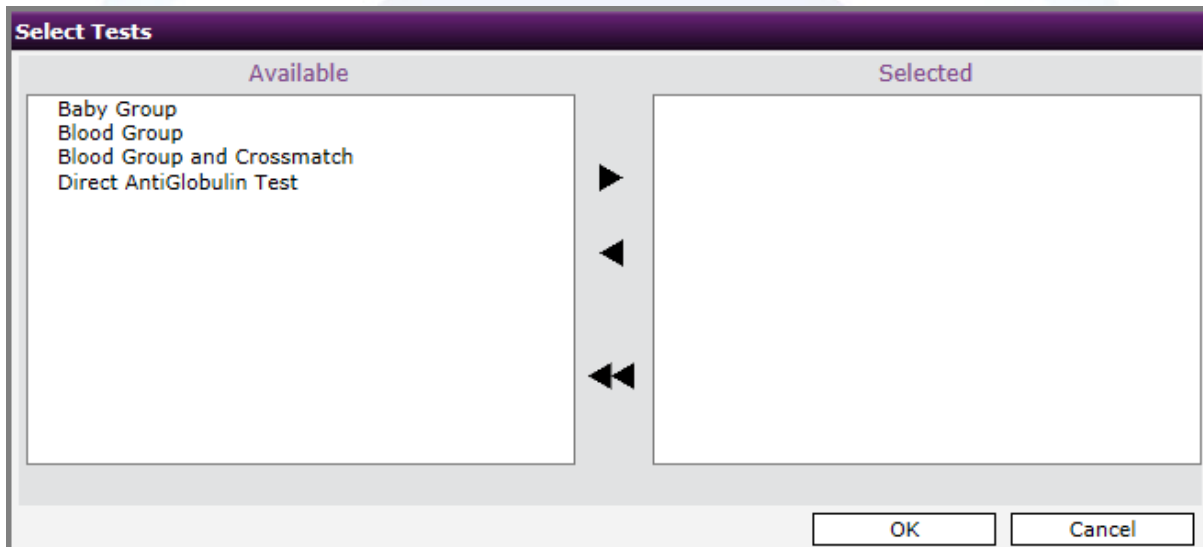
Discipline: Blood Transfusion

Baby Group Blood Group Blood Group and Crossmatch

Direct AntiGlobulin Test

Copy Save Cancel

Tests available for Blood Transfusion:

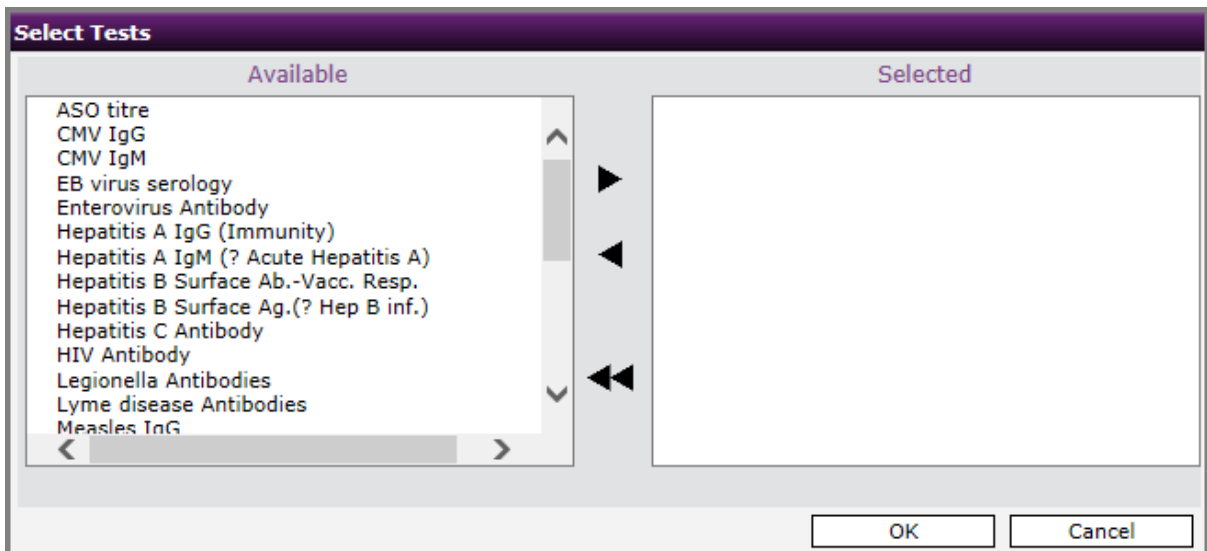


Select Tests

Available	Selected
Baby Group	
Blood Group	
Blood Group and Crossmatch	
Direct AntiGlobulin Test	

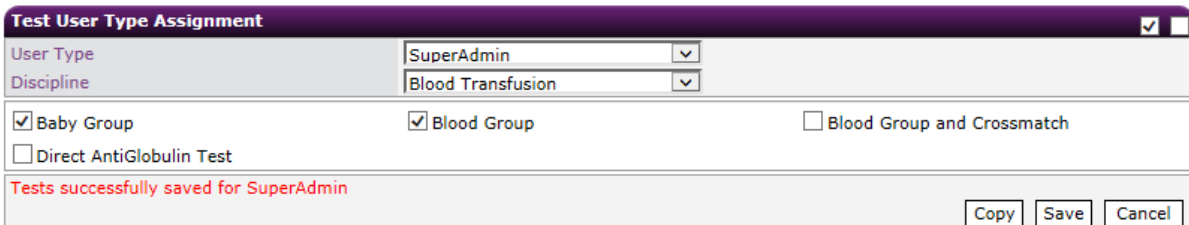
OK Cancel

Test available for Microbiology:

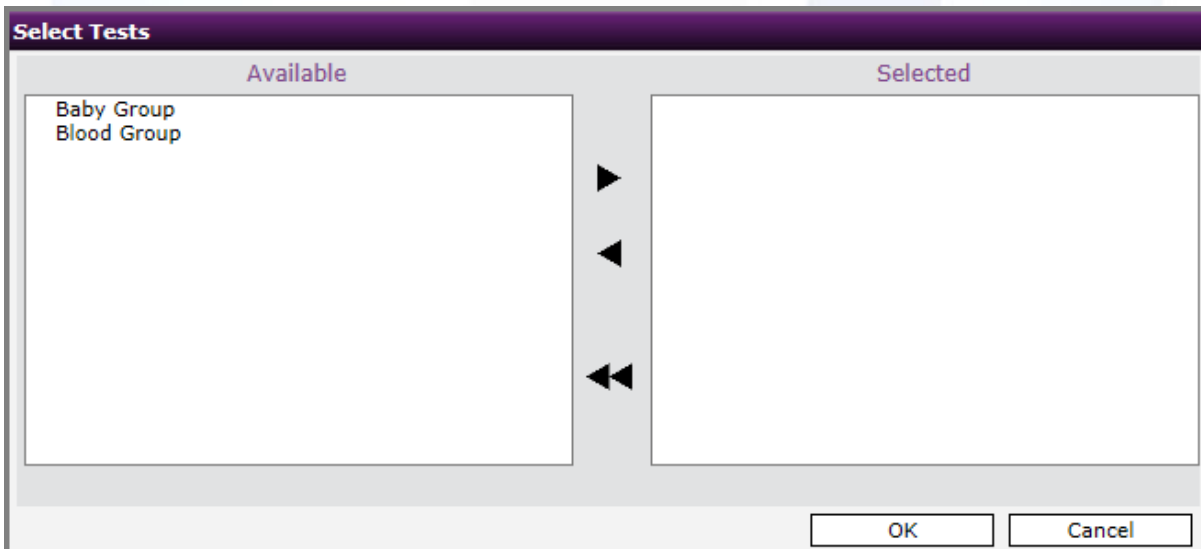


To start restricting the tests available to a user the appropriate tests should be selected. It's important to note that as soon as tests are selected they are the only ones available to the user.

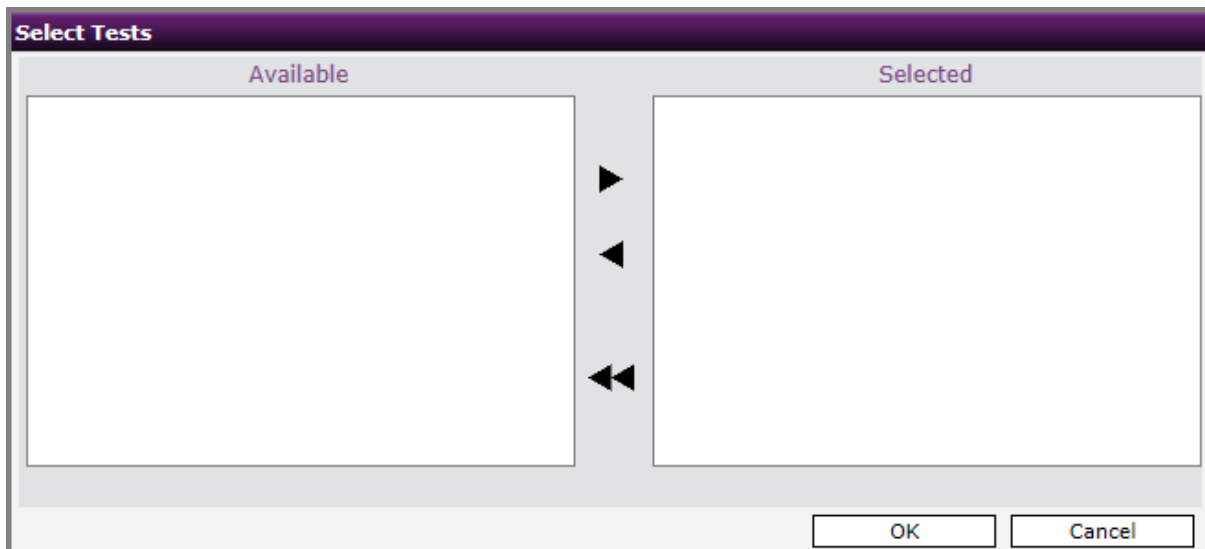
Tests selected for Blood Transfusion and nothing else.



Tests available for Blood Transfusion:

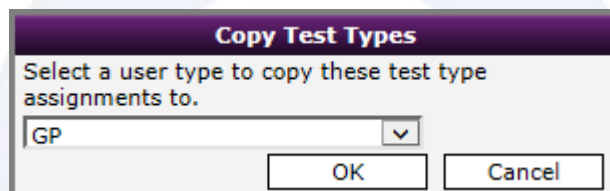


Test available for Microbiology:

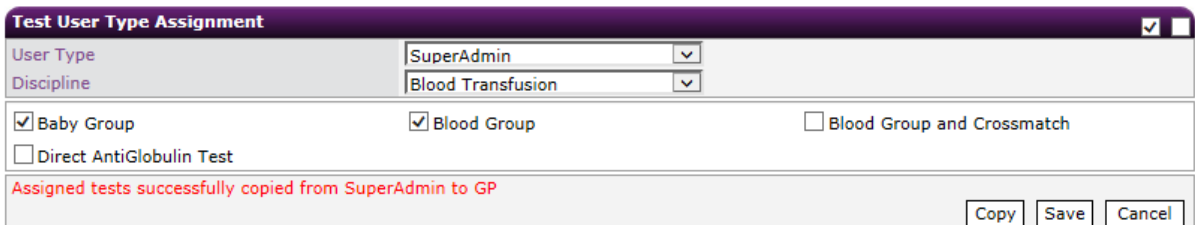


As shown above, by selecting the two Blood Transfusion tests the user can only see those tests. All the Microbiology and other discipline's tests are no longer available.

Once a user type is configured, the selected tests can be copied to another user type. This saves time if other user types are the same or similar. With the source user type selected click 'Copy'. A popup will appear to select the target user type.



With the correct user type selected click 'OK'.



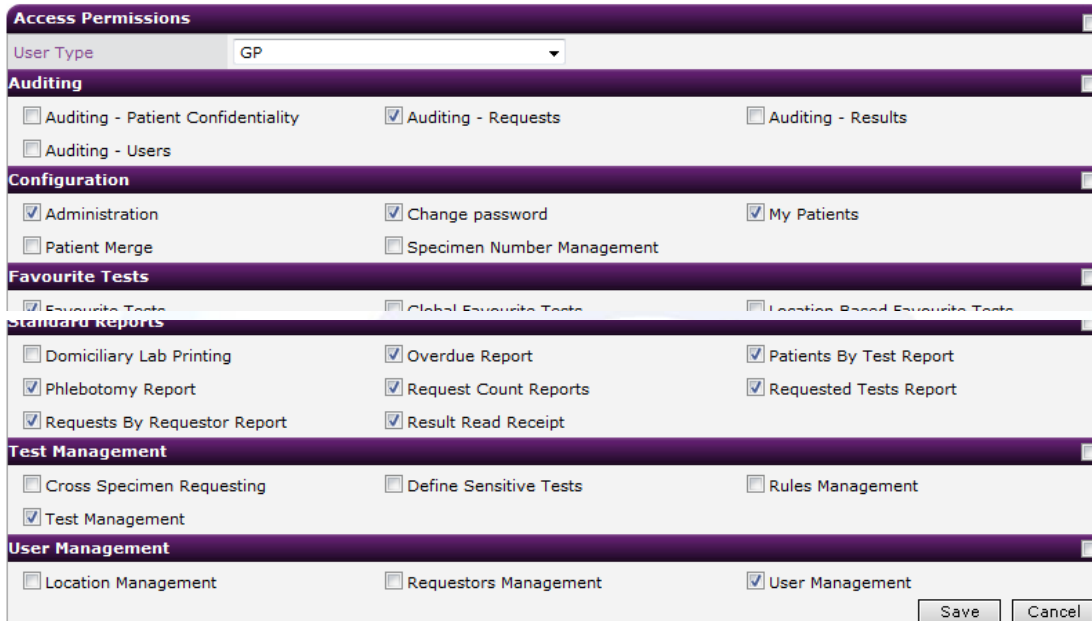
Access Permissions

Access Permissions Overview

Access to the various dartOCM screens can be configured by user type within the 'Access Permissions' screen.

Access Permissions Management

When entering the 'Access Permissions' page the drop down list defaults to super admins. By default super admins can see all screens within dartOCM. To view the permissions for another user type select the type from the drop down. The screen will update to show the permissions for the selected user type.



Access Permissions		
User Type: GP		
Auditing		
<input type="checkbox"/> Auditing - Patient Confidentiality	<input checked="" type="checkbox"/> Auditing - Requests	<input type="checkbox"/> Auditing - Results
<input type="checkbox"/> Auditing - Users		
Configuration		
<input checked="" type="checkbox"/> Administration	<input checked="" type="checkbox"/> Change password	<input checked="" type="checkbox"/> My Patients
<input type="checkbox"/> Patient Merge	<input type="checkbox"/> Specimen Number Management	
Favourite Tests		
<input checked="" type="checkbox"/> Favourite Tests	<input type="checkbox"/> Global Favourite Tests	<input type="checkbox"/> Location Based Favourite Tests
Standard Reports		
<input type="checkbox"/> Domiciliary Lab Printing	<input checked="" type="checkbox"/> Overdue Report	<input checked="" type="checkbox"/> Patients By Test Report
<input checked="" type="checkbox"/> Phlebotomy Report	<input checked="" type="checkbox"/> Request Count Reports	<input checked="" type="checkbox"/> Requested Tests Report
<input checked="" type="checkbox"/> Requests By Requestor Report	<input checked="" type="checkbox"/> Result Read Receipt	
Test Management		
<input type="checkbox"/> Cross Specimen Requesting	<input type="checkbox"/> Define Sensitive Tests	<input type="checkbox"/> Rules Management
<input checked="" type="checkbox"/> Test Management		
User Management		
<input type="checkbox"/> Location Management	<input type="checkbox"/> Requestors Management	<input checked="" type="checkbox"/> User Management
		<input type="button" value="Save"/> <input type="button" value="Cancel"/>

To amend the permissions check/uncheck the check box next to the screen name to enable/disable access to that screen.

The check boxes to the right of each section can be used to select/deselect all the screens within that section. The check box at the very top right can be used to select/deselect all the check boxes on the screen. When finished, click 'Save' to save the changes to the system or click 'Cancel' to undo any changes.

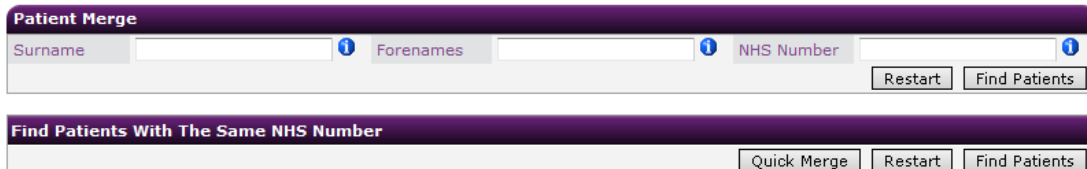
Patient Merge

Patient Merge Overview

The Patient Merge screen allows the merging of duplicate patients. If dartOCM contains multiple patient records for the same physical patient, the records can be merged together so there is only one.

Patient Merge Process

When entering the 'Patient Merge' page the patient records need to be found using the search criteria. Wildcard searching can be used with the '*' character.



Patient Merge

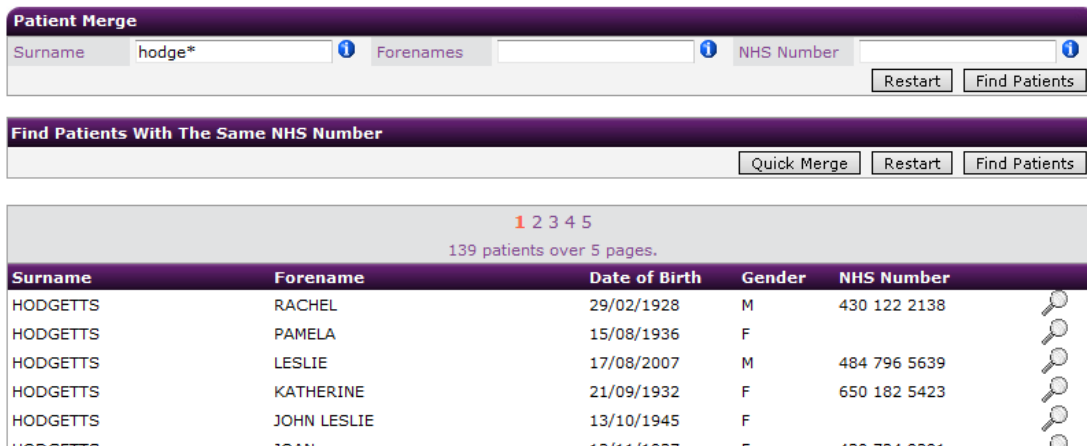
Surname Forenames NHS Number

Restart Find Patients

Find Patients With The Same NHS Number

Quick Merge Restart Find Patients

For example, searching by surname with "hodge*" will return all patients whose surname begins with "hodge".



Patient Merge

Surname Forenames NHS Number

Restart Find Patients

Find Patients With The Same NHS Number

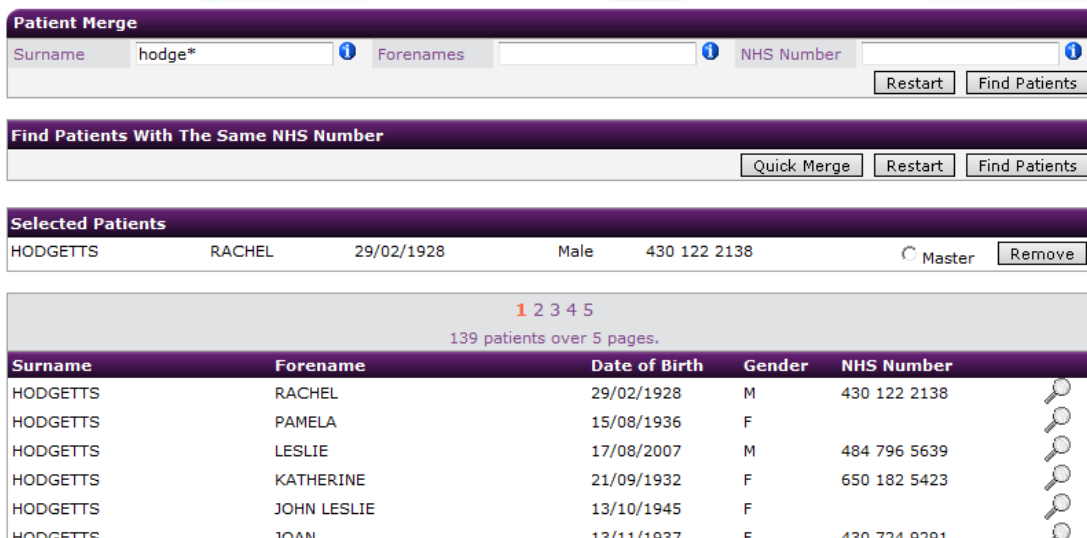
Quick Merge Restart Find Patients

1 2 3 4 5
139 patients over 5 pages.

Surname	Forename	Date of Birth	Gender	NHS Number
HODGETTS	RACHEL	29/02/1928	M	430 122 2138
HODGETTS	PAMELA	15/08/1936	F	
HODGETTS	LESLIE	17/08/2007	M	484 796 5639
HODGETTS	KATHERINE	21/09/1932	F	650 182 5423
HODGETTS	JOHN LESLIE	13/10/1945	F	
HODGETTS	JOAN	13/11/1937	F	430 724 0201

Hovering over the surname will show the address details for the patient.

To begin the process, select the patient records that need to be merged by clicking on the patient row. When clicked, the patient will show in the selected patient section.



Patient Merge

Surname Forenames NHS Number

Restart Find Patients

Find Patients With The Same NHS Number

Quick Merge Restart Find Patients

Selected Patients

HODGETTS	RACHEL	29/02/1928	Male	430 122 2138	Master	Remove
----------	--------	------------	------	--------------	--------	--------

1 2 3 4 5
139 patients over 5 pages.

Surname	Forename	Date of Birth	Gender	NHS Number
HODGETTS	RACHEL	29/02/1928	M	430 122 2138
HODGETTS	PAMELA	15/08/1936	F	
HODGETTS	LESLIE	17/08/2007	M	484 796 5639
HODGETTS	KATHERINE	21/09/1932	F	650 182 5423
HODGETTS	JOHN LESLIE	13/10/1945	F	
HODGETTS	JOAN	13/11/1937	F	430 724 0201

You can perform multiple searches (including Find Patients With The Same NHS Number) without losing the selected patients. This is in case the patient records cannot be seen under a common search.

Patient Merge

Surname ⓘ Forenames ⓘ NHS Number ⓘ

Find Patients With The Same NHS Number

Selected Patients

HODGETTS	RACHEL	29/02/1928	Male	430 122 2138	<input type="radio"/> Master	<input type="button" value="Remove"/>
----------	--------	------------	------	--------------	------------------------------	---------------------------------------

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20
 ▶▶

5608 patients over 187 pages.

Surname	Forename	Date of Birth	Gender	NHS Number	
SMITH	ZANETA	13/04/1918	F	498 983 0342	<input type="checkbox"/>
SMITH	YVONNE MARIE	19/10/1954	M	499 040 7466	<input type="checkbox"/>
SMITH	YVONNE	12/05/2007	F	456 849 5504	<input type="checkbox"/>
SMITH	YVONNE	06/10/1979	F	422 045 0645	<input type="checkbox"/>
SMITH	YVONNE	09/06/1958	F		<input type="checkbox"/>
SMITH	YVONNE	12/01/1951	M		<input type="checkbox"/>

The newly found patient can be added to the selected list.

Patient Merge

Surname ⓘ Forenames ⓘ NHS Number ⓘ

Find Patients With The Same NHS Number

Selected Patients

HODGETTS	RACHEL	29/02/1928	Male	430 122 2138	<input type="radio"/> Master	<input type="button" value="Remove"/>
SMITH	ZANETA	13/04/1918	Female	498 983 0342	<input type="radio"/> Master	<input type="button" value="Remove"/>

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20
 ▶▶

5608 patients over 187 pages.

Surname	Forename	Date of Birth	Gender	NHS Number	
SMITH	ZANETA	13/04/1918	F	498 983 0342	<input type="checkbox"/>
SMITH	YVONNE MARIE	19/10/1954	M	499 040 7466	<input type="checkbox"/>
SMITH	YVONNE	12/05/2007	F	456 849 5504	<input type="checkbox"/>
SMITH	YVONNE	06/10/1979	F	422 045 0645	<input type="checkbox"/>
SMITH	YVONNE	09/06/1958	F		<input type="checkbox"/>

Once two or more patients are selected, the merge button is displayed. To remove a patient record, click the corresponding "Remove" button.

Patient Merge

Surname Forenames NHS Number

Find Patients With The Same NHS Number

Selected Patients

HODGETTS	RACHEL	29/02/1928	Male	430 122 2138	<input checked="" type="radio"/> Master	<input type="button" value="Remove"/>
----------	--------	------------	------	--------------	---	---------------------------------------

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20
5608 patients over 187 pages.

Surname	Forename	Date of Birth	Gender	NHS Number	
SMITH	ZANETA	13/04/1918	F	498 983 0342	<input type="checkbox"/>
SMITH	YVONNE MARIE	19/10/1954	M	499 040 7466	<input type="checkbox"/>
SMITH	YVONNE	12/05/2007	F	456 849 5504	<input type="checkbox"/>
SMITH	YVONNE	06/10/1979	F	422 045 0645	<input type="checkbox"/>
SMITH	YVONNE	09/06/1958	F		<input type="checkbox"/>
SMITH	YVONNE	12/01/1951	M		<input type="checkbox"/>

Two or more patients can be merged at the same time. Select all the records that need to be merged and choose the master record. The master record is the patient details that will be kept. All other patients will be removed from the system once all their requests and results have been associated with the master record.

Patient Merge

Surname Forenames NHS Number

Find Patients With The Same NHS Number

Selected Patients

HODGETTS	RACHEL	29/02/1928	Male	430 122 2138	<input checked="" type="radio"/> Master	<input type="button" value="Remove"/>
SMITH	YVONNE MARIE	19/10/1954	Male	499 040 7466	<input type="radio"/> Master	<input type="button" value="Remove"/>
SMITH	YVONNE	12/05/2007	Female	456 849 5504	<input type="radio"/> Master	<input type="button" value="Remove"/>
SMITH	Yin Man	19/01/1921	Female	492 975 9544	<input type="radio"/> Master	<input type="button" value="Remove"/>

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20
5608 patients over 187 pages.

Surname	Forename	Date of Birth	Gender	NHS Number	
SMITH	ZANETA	13/04/1918	F	498 983 0342	<input type="checkbox"/>
SMITH	YVONNE MARIE	19/10/1954	M	499 040 7466	<input type="checkbox"/>
SMITH	YVONNE	12/05/2007	F	456 849 5504	<input type="checkbox"/>
SMITH	YVONNE	06/10/1979	F	422 045 0645	<input type="checkbox"/>
SMITH	YVONNE	09/06/1958	F		<input type="checkbox"/>
SMITH	YVONNE	12/01/1951	M		<input type="checkbox"/>

Click 'Merge' to perform the patient merge.

Patient Merge

Surname ⓘ Forenames ⓘ NHS Number ⓘ
 Restart Find Patients

Find Patients With The Same NHS Number

Quick Merge Restart Find Patients

Patients successfully merged.

Selected Patients

HODGETTS	RACHEL	29/02/1928	Male	430 122 2138	Master Remove
----------	--------	------------	------	--------------	---------------

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20
 5605 patients over 187 pages.

Surname	Forename	Date of Birth	Gender	NHS Number	
SMITH	ZANETA	13/04/1918	F	498 983 0342	🔍
SMITH	YVONNE	06/10/1979	F	422 045 0645	🔍
SMITH	YVONNE	09/06/1958	F		🔍
SMITH	YVONNE	12/01/1951	M		🔍
SMITH	YVETTE	12/05/1928	F	438 875 2554	🔍

The three Smiths have now been merged into Rachel Hodgetts.

Quick Merge Process

Quick patient merging can be performed by clicking the 'Quick Merge' button under the 'Find Patients With The Same NHS Number' section. The Quick Merge works on the same set of patients returned by clicking 'Find Patients' under the 'Find Patients With The Same NHS Number' section. When clicked the first set of patients with the same NHS number are presented to the user.

Patient Merge

Surname ⓘ Forenames ⓘ NHS Number ⓘ
 Restart Find Patients

Find Patients With The Same NHS Number

Quick Merge Restart Find Patients

Selected Patients

DAVIS	WILLIAM	15/03/1919	Male	333 333 3333	Master
TEST	TEST	20/12/1974	Male	333 333 3333	Master

Skip Merge

Clicking merge will merge the patients. The master patient defaults to the newest entry in dartOCM. Clicking Skip will skip the merge, but only for the current users' session or until they click Restart. When either 'Skip' or 'Merge' are clicked, the next set of patients with the same NHS number are presented to the user

At the end of a batch of quick merges any skipped merges can be seen by clicking 'Find Patients' under the 'Find Patients With The Same NHS Number' section.

Patient Merge

Surname Forenames NHS Number

Find Patients With The Same NHS Number

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20

7036 patients over 235 pages.

Surname	Forename	Date of Birth	Gender	NHS Number
DAVIS	WILLIAM	15/03/1919	M	333 333 3333
TEST	TEST	20/12/1974	M	333 333 3333
CLARE	SUZANNE	11/03/1933	F	402 121 2418
BISHOP	TANYA	06/02/1919	F	402 121 2418
GREENFIELD	MARGARET	20/08/1987	M	402 143 3961
STEELE	PEGGY FLORENCE	01/07/1922	F	402 143 3961

The skipped merges will be at the top of the results. Clicking the magnifying glass at the end of the row will perform a search for that NHS number.

General Search Filters

NHS Number Name Forename Surname Specimen Number

Hospital Number DOB Discipline

Requestor Search Filters

Location GP

Date Search Filters

Date From Date To

Patient Name	Gender	DoB	NHS Number
DAVIS, WILLIAM	M	15/03/1919	333 333 3333
TEST, TEST	M	20/12/1974	333 333 3333

From here the user can view the requests and results associated to the patients to help work out who's who.

WILLIAM DAVIS, 15/03/1919, 333 333 3333, Male

Confidential

Blood Science Results (Haematology, Biochemistry, Immunology and Coagulation)

Time Collected	Location	Requestor	Tests
27/03/2008 10:10	310	MCKE01	Albumin, Alkaline Phosphata...

To change any of the patient details click 'Change PID'.

Change Patient Identifiable Data

NHS Number

Hospital Number

Surname

Forename

Date of Birth

Gender

Address 1

Address 2

Address 3

Address 4

Postcode

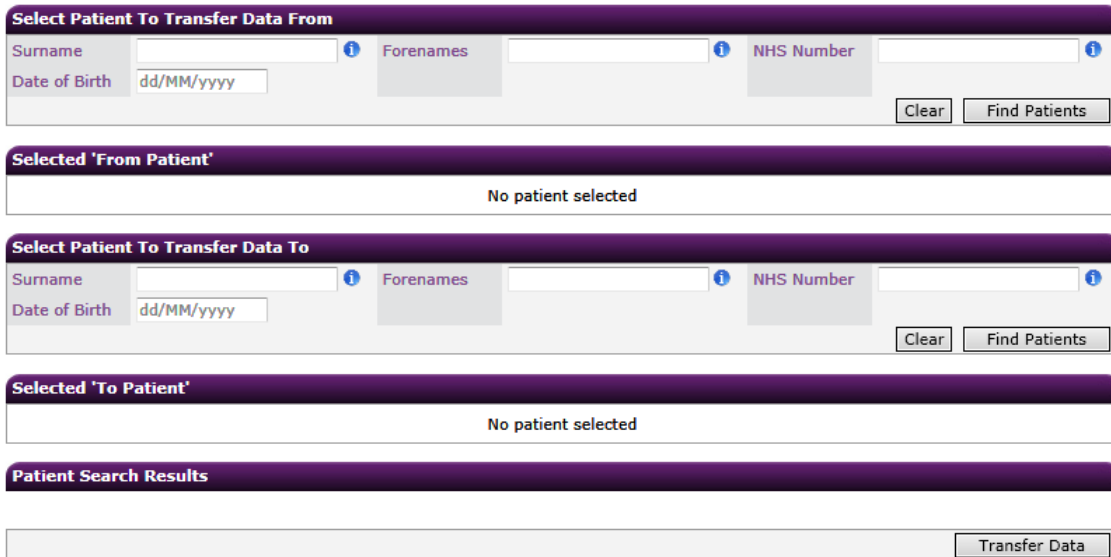
Patient Data Transfer

Patient Data Transfer Overview

If, for some reason, a request or report is assigned to the wrong patient, the Patient Data Transfer screen can be used to rectify the problem.

Patient Data Transfer Process

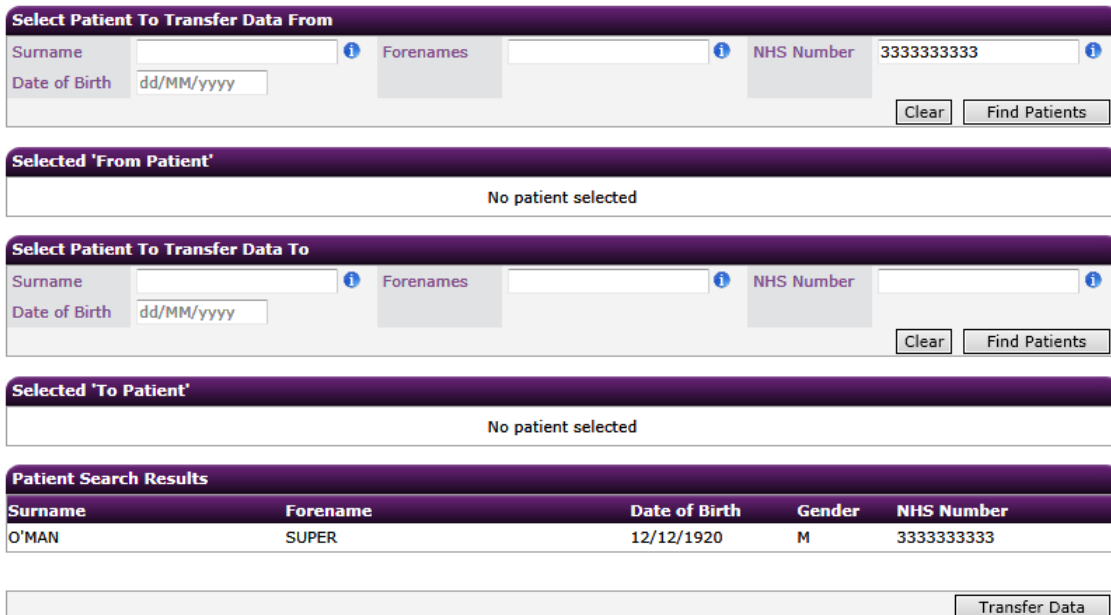
When first opened, the screen will look like the following.



The screenshot shows the 'Patient Data Transfer' interface. It consists of several sections:

- Select Patient To Transfer Data From:** Contains input fields for Surname, Forenames, NHS Number, and Date of Birth (format dd/MM/yyyy). There are 'Clear' and 'Find Patients' buttons.
- Selected 'From Patient':** A box containing the text 'No patient selected'.
- Select Patient To Transfer Data To:** Identical to the 'From' section, with empty input fields.
- Selected 'To Patient':** A box containing the text 'No patient selected'.
- Patient Search Results:** A section with a 'Transfer Data' button.

To find the 'From Patient' complete the search fields and click Find Patient. Matching patients will be displayed in the Patient Search Results section.



This screenshot shows the same interface as the previous one, but with the 'NHS Number' field filled with '333333333'. The 'Patient Search Results' section now displays a table with one patient entry:

Surname	Forename	Date of Birth	Gender	NHS Number
O'MAN	SUPER	12/12/1920	M	333333333

The 'Transfer Data' button is still present at the bottom of the results section.

Click the required patient to load them into the Selected 'From Patient' section. At the same time the patient's requests and reports will be loaded.

Select Patient To Transfer Data From

Surname Forenames NHS Number

Date of Birth

Selected 'From Patient'

O'MAN	SUPER	12/12/1920	Male	333333333	<input type="button" value="Remove"/>
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Select Patient To Transfer Data To

Surname Forenames NHS Number

Date of Birth

Selected 'To Patient'

No patient selected

Patient Search Results

Surname	Forename	Date of Birth	Gender	NHS Number
O'MAN	SUPER	12/12/1920	M	333333333

Requests

Lab Number	Discipline	Date Created	Status	Location	Requestor	<input type="checkbox"/>
500243	Chem/Haem	15/01/2014 16:22	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
500199	Chem/Haem	04/11/2013 14:54	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
500200	Chem/Haem	04/11/2013 14:54	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
F00006048	Chem/Haem	04/11/2013 14:54	Awaiting Specimen Collection	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
F00006003	Serology	24/10/2013 14:41	Submitted By Doctor	Beech House - Boston	Dr I Hodges	<input type="checkbox"/>
PA00005/13	Cellular Pathology	15/10/2013 09:18	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
PH00017/13	Cellular Pathology	23/08/2013 16:11	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
HA222314	Chem/Haem	21/08/2013 16:24	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
...	<input type="checkbox"/>

To find the 'To Patient' complete the search fields and click Find Patient. Matching patients will be displayed in the Patient Search Results section.

Select Patient To Transfer Data From

Surname Forenames NHS Number

Date of Birth

Clear Find Patients

Selected 'From Patient'

O'MAN	SUPER	12/12/1920	Male	3333333333	Remove
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Select Patient To Transfer Data To

Surname Forenames NHS Number

Date of Birth

Clear Find Patients

Selected 'To Patient'

No patient selected

Patient Search Results

Surname	Forename	Date of Birth	Gender	NHS Number
MALONE	BUGSY	22/05/1981	M	1111111111
BROWN	JAMES	19/06/1981	M	1111111111

Requests

Lab Number	Discipline	Date Created	Status	Location	Requestor	<input type="checkbox"/>
500243	Chem/Haem	15/01/2014 16:22	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
500199	Chem/Haem	04/11/2013 14:54	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
500200	Chem/Haem	04/11/2013 14:54	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
F00006048	Chem/Haem	04/11/2013 14:54	Awaiting Specimen Collection	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
F00006003	Serology	24/10/2013 14:41	Submitted By Doctor	Beech House - Boston	Dr I Hodges	<input type="checkbox"/>
PA00005/13	Cellular Pathology	15/10/2013 09:18	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
PH00017/13	Cellular Pathology	23/08/2013 16:11	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
HA222314	Chem/Haem	21/08/2013 16:24	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>

Click the required patient to load them into the Selected 'From Patient' section.

Select Patient To Transfer Data From

Surname Forenames NHS Number

Date of Birth

Selected 'From Patient'

O'MAN	SUPER	12/12/1920	Male	333333333	<input type="button" value="Remove"/>
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Select Patient To Transfer Data To

Surname Forenames NHS Number

Date of Birth

Selected 'To Patient'

MALONE	BUGSY	22/05/1981	Male	111111111	<input type="button" value="Remove"/>
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Patient Search Results

Surname	Forename	Date of Birth	Gender	NHS Number
MALONE	BUGSY	22/05/1981	M	111111111
BROWN	JAMES	19/06/1981	M	111111111

Requests

Lab Number	Discipline	Date Created	Status	Location	Requestor	<input type="checkbox"/>
500243	Chem/Haem	15/01/2014 16:22	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
500199	Chem/Haem	04/11/2013 14:54	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
500200	Chem/Haem	04/11/2013 14:54	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
F00006048	Chem/Haem	04/11/2013 14:54	Awaiting Specimen Collection	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
F00006003	Serology	24/10/2013 14:41	Submitted By Doctor	Beech House - Boston	Dr I Hodges	<input type="checkbox"/>
PA00005/13	Cellular Pathology	15/10/2013 09:18	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
PH00017/13	Cellular Pathology	23/08/2013 16:11	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>
HA222314	Chem/Haem	21/08/2013 16:24	Acknowledgement received	Keyworth Surgery	Dr I Hodges	<input type="checkbox"/>

Select the requests and/or reports that need to be moved to the 'To Patient'.

27/03/2008 10:10	310	MCKE01	eGFR (modified MDRD), Urea ...	<input type="checkbox"/>
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Microbiology Results

Time Collected	Location	Requestor	Tests	<input type="checkbox"/>
19/11/2012 14:36	WOP	KEAR^Mr E Kearney	ICN	<input checked="" type="checkbox"/>
19/11/2012 14:36	WOP	KEAR^Mr E Kearney	ICN	<input checked="" type="checkbox"/>
06/11/2008 15:14	KINV	DEAN	GOCCY	<input type="checkbox"/>
06/11/2008 13:57	MWLQ	MIDW	IRES, RIGG, SAGE, SYPG	<input type="checkbox"/>
06/11/2008 10:14	CMF	FS12	IRES, RIGG, SAGE, SYPG	<input type="checkbox"/>
15/10/2008 14:05	SANF	DJFA	IRES, RIGG, SAGE, SYPG, VZIG	<input type="checkbox"/>
01/02/2008 15:03	SYDN	FLANAV	UC, UM	<input type="checkbox"/>

Click Transfer Data. You will be prompted to confirm the action.

Are You Sure?

Are you sure you wish to transfer the selected data from 'SUPER O'MAN' to 'BUGSY MALONE'?

Clicking Yes will complete the transfer.

05/11/2008 18:41	SANF	GP	Haemoglobin, White Blood Ce...	<input type="checkbox"/>
05/11/2008 18:10	SANF	GP	Downs Screening	<input type="checkbox"/>
27/03/2008 10:10	310	MCKE01	eGFR (modified MDRD), Urea ...	<input type="checkbox"/>

Microbiology Results

Time Collected	Location	Requestor	Tests	<input type="checkbox"/>
06/11/2008 15:14	KINV	DEAN	GOCCY	<input type="checkbox"/>
06/11/2008 13:57	MWLQ	MIDW	IRES, RIGG, SAGE, SYPG	<input type="checkbox"/>
06/11/2008 10:14	CMF	FS12	IRES, RIGG, SAGE, SYPG	<input type="checkbox"/>
15/10/2008 14:05	SANF	DJFA	IRES, RIGG, SAGE, SYPG, VZIG	<input type="checkbox"/>
01/02/2008 15:03	SYDN	FLANAV	UC, UM	<input type="checkbox"/>

The data transfer has been completed.

Each moved item will have an audit entry added to indicate that it was initially assigned to a different patient.

Patient Result Audit

Show Audit From: Actioning User:
 Specimen Number:

1 2 3 4 5

146 results over 5 pages.

Date Logged	Description	Viewed By
10/04/2014 12:01	viewed results for request MS110036Q.	Sumaira Sanaullah
10/04/2014 11:57	Result has been transferred from patient 'SUPER O'MAN (12/12/1920 333333333 Male)' to patient 'BUGSY MALONE (22/05/1981 1111111111 Male)'	Sumaira Sanaullah
25/03/2014 10:55	viewed results for request MS110036Q.	Sumaira Sanaullah
17/03/2014 15:50	viewed results for request MS110036Q.	Sumaira Sanaullah
24/02/2014 10:17	viewed results for request MS110036Q.	Sumaira Sanaullah

Requestors

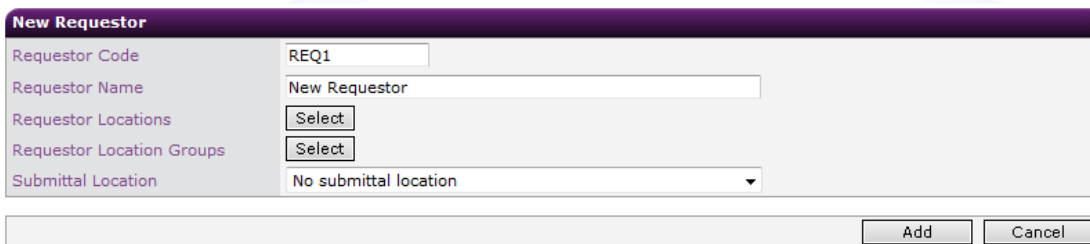
Requestors Overview

When making requests within dartOCM the request must be assigned a valid requestor for it to be submitted to the LIMS system. The requestors within dartOCM must match the requestors in the LIMS system. If the codes do not match the request will fail when submitted to the LIMS system.

Requestors are configured during original setup to specifications supplied.

Requestor Management

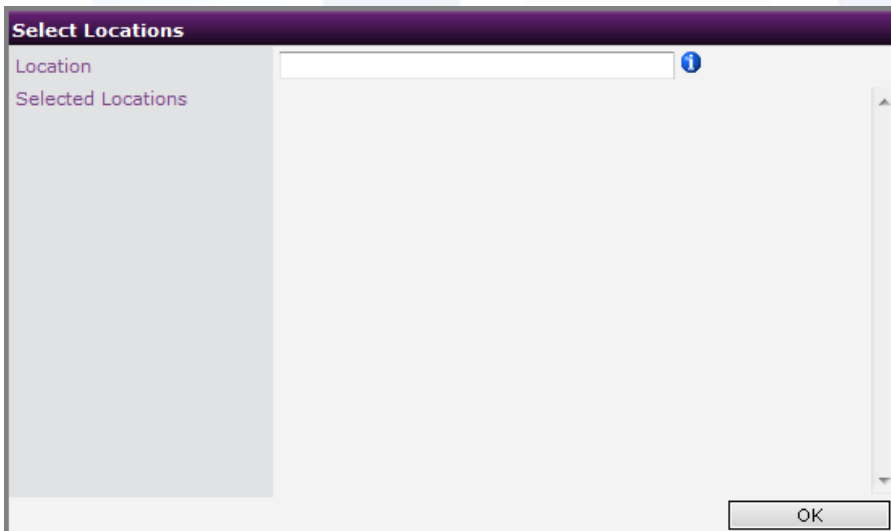
Within the 'Requestors' screen you can add and edit requestors. To add a new requestor, enter the code and name of the new requestor.



Requestor Code	REQ1
Requestor Name	New Requestor
Requestor Locations	Select
Requestor Location Groups	Select
Submittal Location	No submittal location

Buttons: Add, Cancel

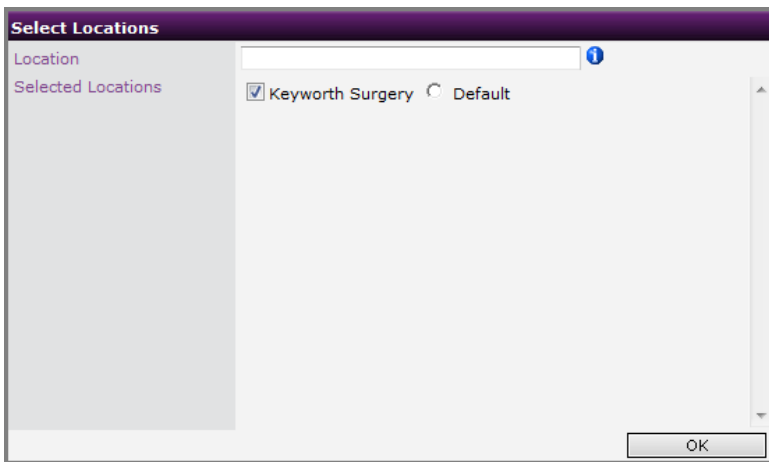
A requestor can be linked to multiple locations. A requestor can be linked to one or more individual locations and to predefined location groups. To add the requestor to an individual location and specify the default location click on the 'Select' button next to Requestor Locations.



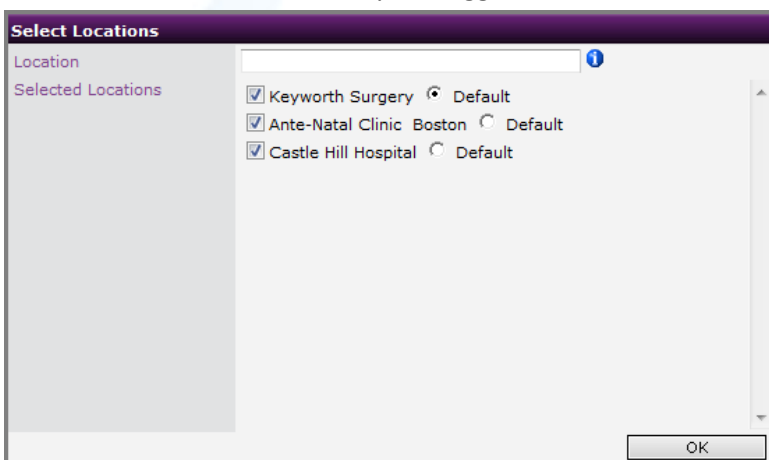
Location	<input type="text"/>
Selected Locations	

Buttons: OK

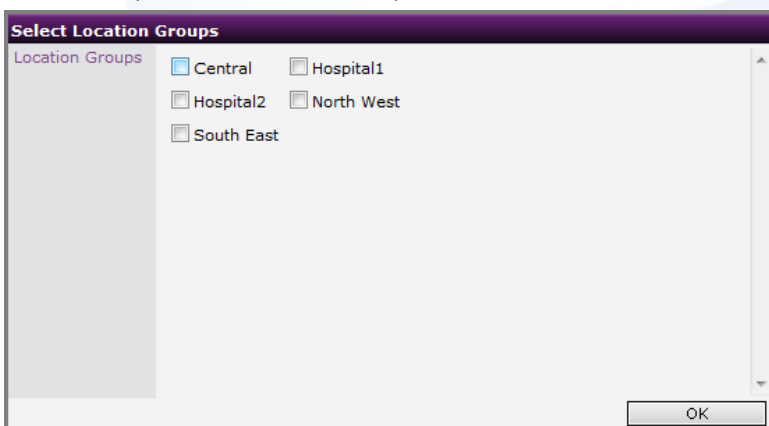
In the location field start typing the name of the location that the requestor will be linked to. A drop down list will appear with valid locations that the requestor can be linked to. Select the correct location and tab or click away from the locations field. The location will be added to the list of selected locations for the new requestor.



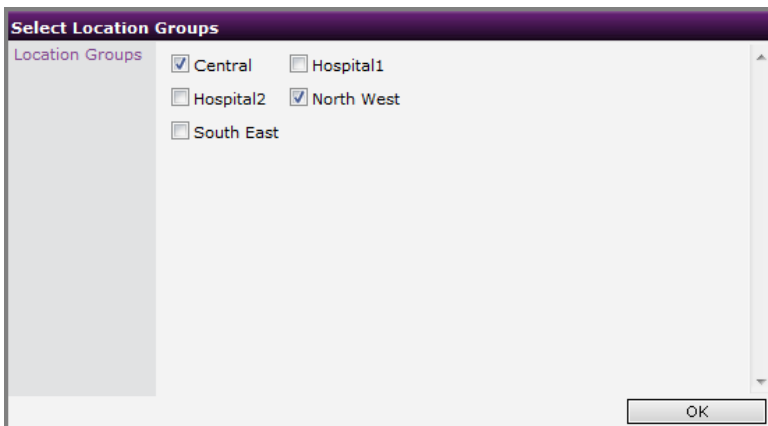
Repeat these steps until all the locations are added. A default location is mandatory. The user can change their default location when they are logged into dartOCM.



Once finished click 'OK'. To add the requestor to one or more location groups click on the 'Select' button next to Requestor Location Groups.



Select all the location groups the requestor will be allowed to order from.



Select Location Groups

Location Groups

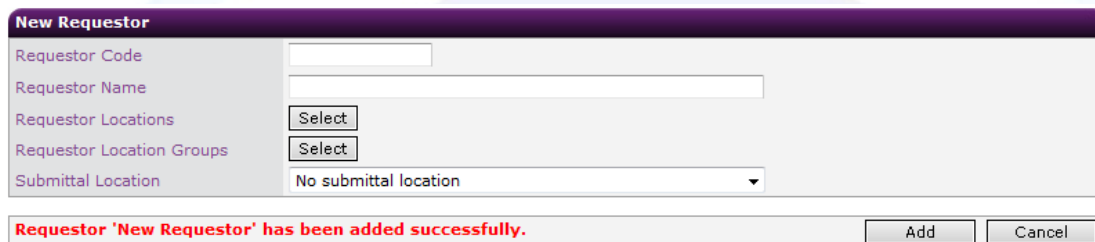
Central Hospital1
 Hospital2 North West
 South East

OK

Once finished click 'OK'.

If your system is configured for multiple submittal locations the 'Submittal Location' dropdown will be enabled and you can choose which site the requestor will be submitting requests to.

If your system isn't setup for multiple submittal locations the drop down will be disabled. Click "Add" to add the new requestor or "cancel" to clear the fields.



New Requestor

Requestor Code:

Requestor Name:

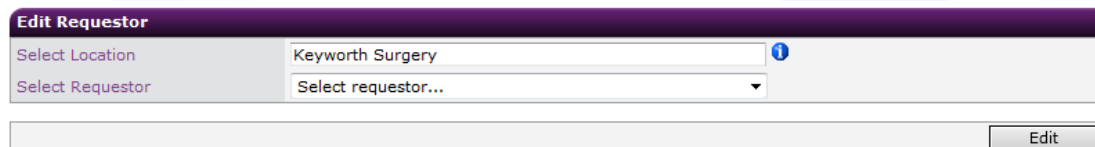
Requestor Locations:

Requestor Location Groups:

Submittal Location: No submittal location

Requestor 'New Requestor' has been added successfully.

To edit or delete a requestor, select the location by typing the location name into the location field. The auto complete function will show a drop down of valid location names to help with the location selection. Select the location which will populate the requestor drop down with the requestors at the selected location. Select the requestor from the drop down list.

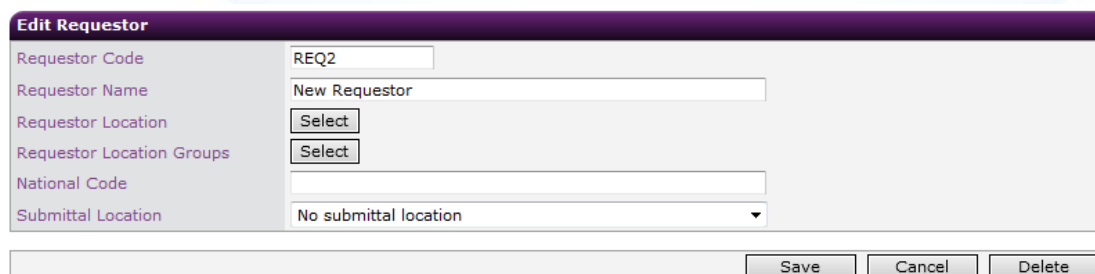


Edit Requestor

Select Location: Keyworth Surgery

Select Requestor: Select requestor...

As soon as a requestor is selected the details will be loaded.



Edit Requestor

Requestor Code: REQ2

Requestor Name: New Requestor

Requestor Location:

Requestor Location Groups:

National Code:

Submittal Location: No submittal location

Alternatively, if the requestor is proving hard to find, the requestor can be searched in the Find Requestor section.



Find Requestor

Requestor Name:

As the requestor name is typed a drop down will appear with matching requestors.

Find Requestor

Requestor Name

Selecting a requestor from the drop down will load it into the Edit Requestor section.

Amend the properties of the requestor and click 'Save' to save the changes to the system or click 'Cancel' to cancel the changes.

To delete the requestor click 'Delete'. A requestor is not removed from the system completely, but marked as inactive. To reactive a requestor, select the requestor in the Inactive Requestors section.

Inactive Requestors

Requestor

Click 'Reactivate' to make the requestor active again.

Requestor Group Overview

Requestors can be grouped together according to job function, location, or any logical reason. Once created the requestor group can be used as a permissions object i.e. the same way a user or user group can be given permissions to a certain action or location.

Requestor Group Management

To create a new group, provide a name and click 'Select' to choose the requestors.

New Requestor Group

Group Name

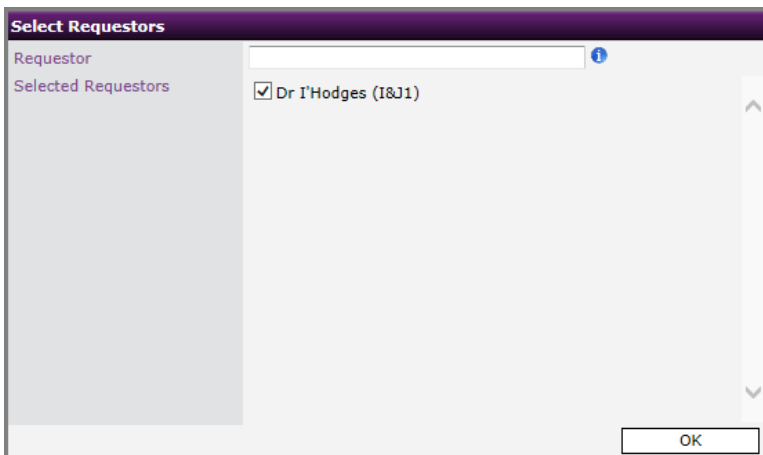
Group Requestors

Select Requestors

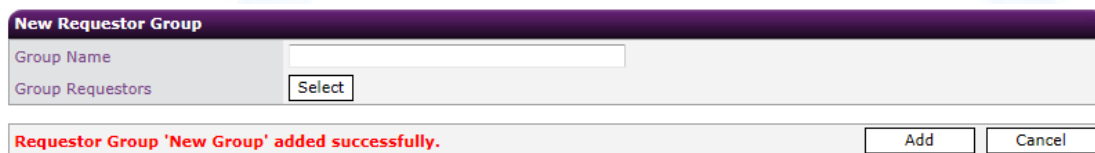
Requestor

Selected Requestors

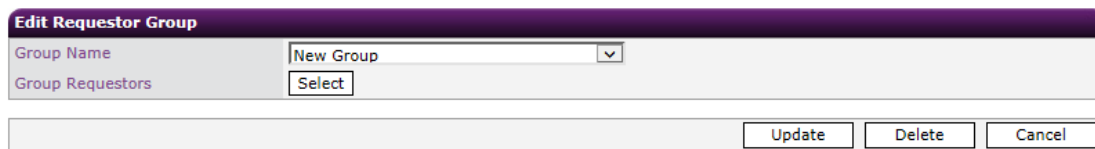
Start typing the name of the requestor and matching names will appear in a drop down. Selecting the requestor from the drop down will add them to the group.



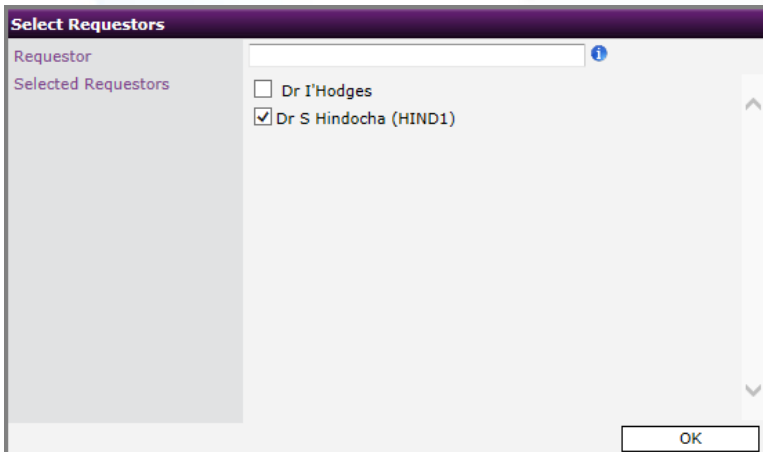
Continue until all are added and click 'OK', and then 'Add'.



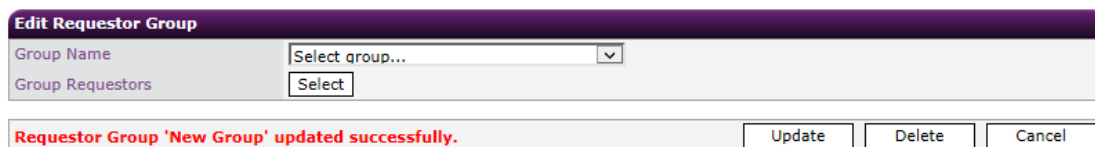
To edit a group, select it in the Edit Requestor Group section.



Clicking 'Select' opens the selection popup. To remove a requestor, uncheck their checkbox. To add a new requestor, search for them by typing their name in the Requestor text box.



Click 'OK' and then 'Update' to complete the change.



Locations

Locations Overview

When making requests within dartOCM the request must be assigned a valid location for it to be submitted to the LIMS system. The locations within dartOCM must match the locations in the LIMS system. If the codes do not match the request will fail when submitted to the LIMS system.

Location Management

Locations can be added and edited within the Locations screen.

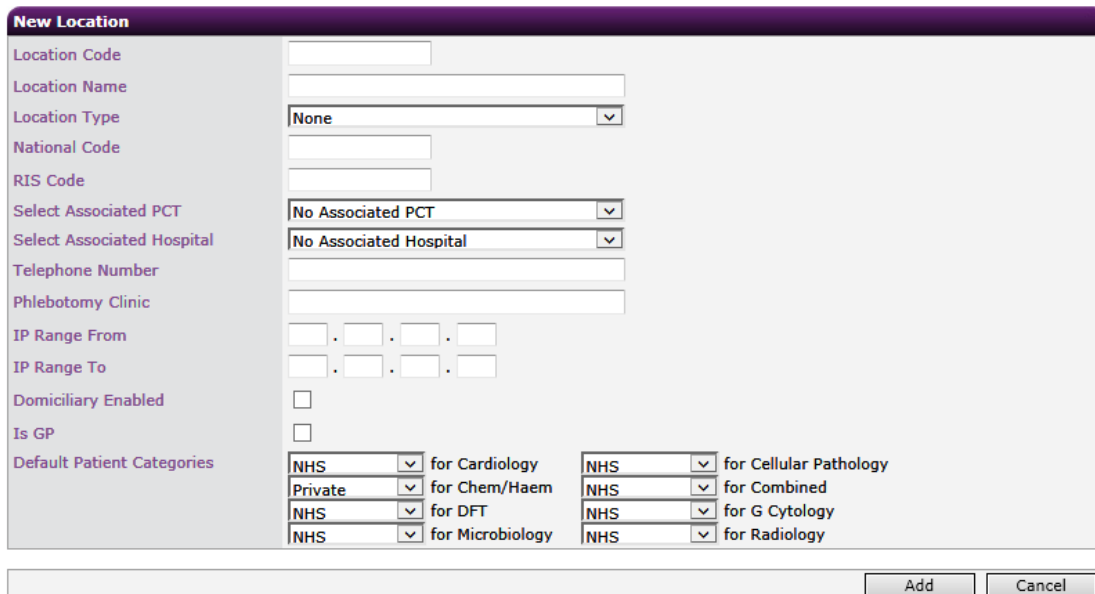
To add a new location, enter the code, name and telephone number of the new location. If there are any PCTs configured the location can be linked to the PCT which the location is in.

If there are any hospitals configured the location can be linked to the hospital which the location usually sends its requests to.

In the IP fields enter the IP address range that the location uses for its computers. When a user connects to dartOCM via LabelTrace the IP address of the connecting machine is checked to see if it is within the range stored within dartOCM.

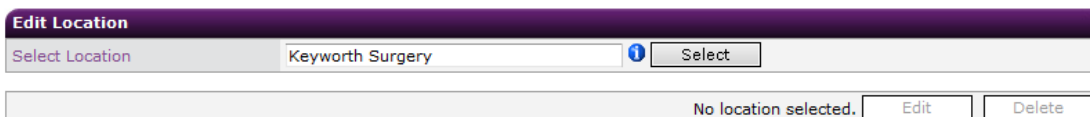
If the IP address falls outside of this range they are not automatically logged in and are taken to the login screen where they have to manually log in. To enable domiciliary requests to be created from this location check the Domiciliary Enabled checkbox. Change the default patient categories for any of the disciplines if required (see Patient Categories Management for details on how these are configured).

The default patient category affects which patient category is initially selected on the request screen.



Click 'Add' to add the location to the system or click 'Cancel' to cancel the action.

To edit a location, start typing the location name into the 'Select Location' field. The auto complete function will populate a drop down of valid locations as you type.



Select the required location from the drop down and click 'Select'.

Edit Location

Select Location Select

Selected location: Keyworth Surgery Edit Delete

Click 'Edit' to edit the location.

Edit Location

Location Code	<input type="text" value="I&J"/>								
Location Name	<input type="text" value="Keyworth Surgery"/>								
Location Type	<input type="text" value="Out Patient"/>								
National Code	<input type="text" value="H6543"/>								
RIS Code	<input type="text" value="rizzy"/>								
Select Associated PCT	<input type="text" value="Dartford & Gravesham NHS Trust"/>								
Select Associated Hospital	<input type="text" value="Darent Vallev Hospital"/>								
Telephone Number	<input type="text" value="0115 971 6661"/>								
Phlebotomy Clinic	<input type="text" value="Assure"/>								
IP Range From	<input type="text" value="000"/> . <input type="text" value="000"/> . <input type="text" value="000"/> . <input type="text" value="000"/>								
IP Range To	<input type="text" value="255"/> . <input type="text" value="255"/> . <input type="text" value="255"/> . <input type="text" value="255"/>								
Domiciliary Enabled	<input checked="" type="checkbox"/>								
Is GP	<input checked="" type="checkbox"/>								
Default Patient Categories	<table style="width: 100%; border-collapse: collapse;"> <tr> <td><input type="text" value="NHS"/> for Cardiology</td> <td><input type="text" value="Private"/> for Cellular Pathology</td> </tr> <tr> <td><input type="text" value="NHS"/> for Chem/Haem</td> <td><input type="text" value="NHS"/> for Combined</td> </tr> <tr> <td><input type="text" value="NHS"/> for DFT</td> <td><input type="text" value="Private"/> for G Cytology</td> </tr> <tr> <td><input type="text" value="Micro"/> for Microbiology</td> <td><input type="text" value="2 Week"/> for Radiology</td> </tr> </table>	<input type="text" value="NHS"/> for Cardiology	<input type="text" value="Private"/> for Cellular Pathology	<input type="text" value="NHS"/> for Chem/Haem	<input type="text" value="NHS"/> for Combined	<input type="text" value="NHS"/> for DFT	<input type="text" value="Private"/> for G Cytology	<input type="text" value="Micro"/> for Microbiology	<input type="text" value="2 Week"/> for Radiology
<input type="text" value="NHS"/> for Cardiology	<input type="text" value="Private"/> for Cellular Pathology								
<input type="text" value="NHS"/> for Chem/Haem	<input type="text" value="NHS"/> for Combined								
<input type="text" value="NHS"/> for DFT	<input type="text" value="Private"/> for G Cytology								
<input type="text" value="Micro"/> for Microbiology	<input type="text" value="2 Week"/> for Radiology								

Update Cancel Delete

Amend the properties of the location and click 'Update' to save the changes to the system or click 'Cancel' to cancel the action.

Click 'Delete' to delete the location. The location is not removed from the system, but is marked inactive. To reinstate a location, select it from the inactive locations drop down and click 'Reactivate'.

Inactive Locations

Location

Reactivate

Users

User and Requestor Relationship

A 'user' and 'requestor' are two separate properties within dartOCM. A user gives an individual access into the dartOCM system and allows all functionality allocated to the type of user. A requestor is the details of an individual who can order requests. The requestor's details must match the details stored in the LIMS. A user account can be linked to a requestor. When a user is linked to a requestor the requestor details are used to populate the requestor field with the request page when that user is logged in.

Finding Users

When first entering the 'Users' screen, when logged in as a super admin, you will see all the users at all locations.

User Management

- Search By Location

User Type v
 Location i Select

+ Search By Name

User List i

- 1, Testing
- 2, Testing
- Bligh, Annes
- Bloggs3, John (locked)
- Butt, S
- Chapman, Joanna
- Charlton, Keith
- Clinician, Clinician
- Cullinan, Derryl
- Davies, Amanda
- Day, Steve
- Depinnar, Boeta
- Donald, Allen
- Dowling, Sheila
- Dunnett, Dr K
- Ferguson, Dr D
- Forman4, Dr S4
- Glenn, Joseph
- Glenn, Joseph
- Glenn, Joseph
- global, global
- gp, gp
- gpadmin, gpadmin
- Hancock, Sarah
- Hodges, Ian
- Hodges, Ian
- Hodges, Ian
- Hodges, Ian
- Hodges, Ian
- Hodges, Ian
- Hodges, Ian
- Hodges, Ian
- Hodges, Ian
- Hodges1, Ian
- Hodges2, Ian (locked)
- Hunter, Craig
- J, SH
- khan, normal

User Details

First Name	<input type="text"/>
Last Name	<input type="text"/>
Email Address	<input type="text"/>
Username	<input type="text"/>
National Code	<input type="text"/>
Clinical System Username	<input type="button" value="Edit"/> None Selected
Password	<input type="password"/>
Re-Type Password	<input type="password"/>
Grade	<input type="text" value="None"/>
User Type	<input type="text" value="Select User Type..."/>
Home Page	<input type="text" value="Select Home Page..."/>
Location	<input type="text"/>
Requestor	<input type="text" value="Type location name above..."/>
Description	<input type="text"/>
View Sensitive Results	<input type="checkbox"/>
Locked	<input type="checkbox"/>
Force Password Reset	<input type="checkbox"/>

The list of users on the left hand side can be filtered by user type and location. To see all the GP users select 'GP' in the user type drop down.

User Management

- Search By Location

User Type GP

Location GP users everywhere. Select

+ Search By Name

User List i

- Butt, S
- Clinician, Clinician
- Cullinan, Derryl
- Davies, Amanda
- Day, Steve
- Dowling, Sheila
- Dunnett, Dr K
- Ferguson, Dr D
- Glenn, Joseph
- gp, gp
- Hodges, Ian
- Lace, John
- Normal, GP
- Normal, GP
- Normal, GP
- Ntini, Makhaya
- P, Tom
- Practitioner, General
- Practitioner 1, General
- Practitioner 2, General
- Punglia, Mark
- rtyu, rtyu
- sdfg, sdfg
- TANTf, Martinf
- test, woolard
- User, Another
- User, Emis
- User, GP
- Vision, Dr

User Details

First Name

Last Name

Email Address

Username

National Code

Clinical System Username Edit None Selected

Password

Re-Type Password

Grade None

User Type Select User Type...

Home Page Select Home Page...

Location

Requestor Type location name above...

Description

View Sensitive Results

Locked

Force Password Reset

Clear All
Remove User
Add/Update User
Multiple User Upload

The users within the list are colour coded depending on the user type. Clicking the blue 'i' will show a popup with a table showing the colour relationships.

User List i

- Butt, S
- Clinician, Clinician
- Cullinan, Derryl
- Davies, Amanda
- Dowling, Sheila
- Dunnett, Dr K
- edede, edede
- Ferguson, Dr D
- gp, gp
- Lace, John
- Normal, GP
- Normal, GP
- Normal, GP
- Ntini, Makhaya
- Practitioner, General
- Practitioner 1, General
- Practitioner 2, General
- Punglia, Mark
- rtyu, rtyu
- sdfg, sdfg
- TANTf, Martinf

User Details

User Type	Colour key	Name
SuperAdmin		Name
GPAAdmin		Name
GP		il Address
Ward Staff		Name
Pathology Staff		Name
Misc1		password
Misc2		password
PathologyAdmin		Type Password
Phlebotomist		Type Password
GlobalAdmin		Type Password
Testing		Type Password

Close

To view GP users at a particular location select 'GP' from the user type drop down and start typing the location name in the 'Location' field. As you type a drop down will appear giving valid locations based on the text typed in the field. Select the required location in the drop down and click 'Select'. The user list on the left hand side will now display all GPs at Keyworth Surgery.

- Search By Location
 User Type: GP
 Location: Keyworth Surgery
GP users at Keyworth Surgery.
 + Search By Name

User List	User Details
Cullinan, Derryl Lace, John Practitioner 1, General Practitioner 2, General test, woolard User, GP	First Name: <input type="text"/> Last Name: <input type="text"/> Email Address: <input type="text"/>

To find a user by name, expand the 'Search by Name' panel by clicking the cross next to the title. Type part of the name into the 'Name' field and click 'Search'.

+ Search By Location
 - Search By Name
 Name: test

User List	User Details
test, woolard test phlebo, test1 Testing, Testing user, test	First Name: <input type="text"/> Last Name: <input type="text"/> Email Address: <input type="text"/> User Name: <input type="text"/>

The user list on the left will be populated with users whose name contains the text entered in to the 'Name' field.

New Users

To add a new user to the system fields complete the mandatory fields:

- First Name
- Last name
- User Name
- Passwords
- User Type
- Home Page
- Location
- Requestor

Email Address and Description are not mandatory.

If an existing users details are in these fields click 'Clear All' before entering the new user's details. The location field has auto complete functionality. Valid locations within the system will be presented in a drop down as text is typed in to this field.

To begin, specify the first name and last name of the user. After focus is lost from the last name field the system will automatically create an unused user name. If **AUser** was already in the system then **AUser1** would have been used. A random password which meets the current password policy is also created.

First Name	Another
Last Name	User
Email Address	
Username	AUser
National Code	
Clinical System Username	<input type="button" value="Edit"/> None Selected
Password	●●●●●●●●
Re-Type Password	●●●●●●●●
Grade	None
User Type	Select User Type...
Home Page	Select Home Page...
Location	
Requestor	Type location name above...
Description	
View Sensitive Results	<input type="checkbox"/>
Locked	<input type="checkbox"/>
Force Password Reset	<input type="checkbox"/>

If the user will need to know their password, then the auto generated password will need to be over written. As you type the system will indicate how strong the password is and what characters are required to meet the password policy. If the entered password does not meet the password policy, the user will not be saved.

First Name	Another
Last Name	User
Email Address	
Username	AUser
National Code	
Clinical System Username	<input type="button" value="Edit"/> None Selected
Password	●● ■ 4 more characters
Re-Type Password	●●●●●●●●
Grade	None
User Type	Select User Type...
Home Page	Select Home Page...
Location	
Requestor	Type location name above...
Description	
View Sensitive Results	<input type="checkbox"/>
Locked	<input type="checkbox"/>
Force Password Reset	<input type="checkbox"/>

Complete the rest of the fields as required.

First Name	<input type="text" value="Another"/>
Last Name	<input type="text" value="User"/>
Email Address	<input type="text"/>
Username	<input type="text" value="AUser"/>
National Code	<input type="text"/>
Clinical System Username	<input type="button" value="Edit"/> None Selected
Password	<input type="password" value="••••••"/>
Re-Type Password	<input type="password" value="••••••"/>
Grade	<input type="text" value="Second Year Doctor"/>
User Type	<input type="text" value="GP"/>
Home Page	<input type="text" value="Home"/>
Location	<input type="text" value="Keyworth Surgery"/>
Requestor	<input type="text" value="Dr I Hodges"/>
Description	<input type="text"/>
View Sensitive Results	<input type="checkbox"/>
Locked	<input type="checkbox"/>
Force Password Reset	<input checked="" type="checkbox"/>

- View Sensitive Results - allow the user to view sensitive results.
- Locked - prevents the user from logging in.
- Force Password Reset - forces the user to reset their password when they login next.

Click 'Add/Update User' to save the new user to the system. The user name and password entered here will be used by the user when logging into dartOCM.

Amend Users

To amend the details of an existing user, first find the user to be edited using the search techniques described above. Once the user is shown on the left hand list, click on the user.

User Management

- Search By Location

User Type ▼
 Location Select
GP users everywhere.

+ Search By Name

User List i

- Butt, S
- Clinician, Clinician
- Cullinan, Derryl
- Davies, Amanda
- Day, Steve
- Dowling, Sheila
- Dunnett, Dr K
- Ferguson, Dr D
- Glenn, Joseph
- gp, gp
- Hodges, Ian
- Lace, John
- Normal, GP
- Normal, GP
- Normal, GP
- Ntini, Makhaya
- P, Tom
- Practitioner, General
- Practitioner 1, General
- Practitioner 2, General
- Punglia, Mark
- rtyu, rtyu
- sdfg, sdfg
- TANTf, Martinf
- test, woolard
- User, Another
- User, Emis
- User, GP
- Vision, Dr

User Details

First Name	Another
Last Name	User
Email Address	
Username	AUser
National Code	
Clinical System Username	Edit None Selected
Password	
Re-Type Password	
Grade	Second Year Doctor
User Type	GP
Home Page	Home
Location	Keyworth Surgery
Requestor	Dr I Hodges
Description	
View Sensitive Results	<input type="checkbox"/>
Locked	<input type="checkbox"/>
Force Password Reset	<input type="checkbox"/>

Update user details for username 'AUser'.

Clear All
Remove User
Add/Update User
Multiple User Upload

Make the required changes and then click 'Add/Update User'. The password fields are initially blank. If a password change is required enter the new password into the fields. If a password change is not required, leave these fields blank and the password will be unchanged. Click 'Remove User' to delete a user from the system.

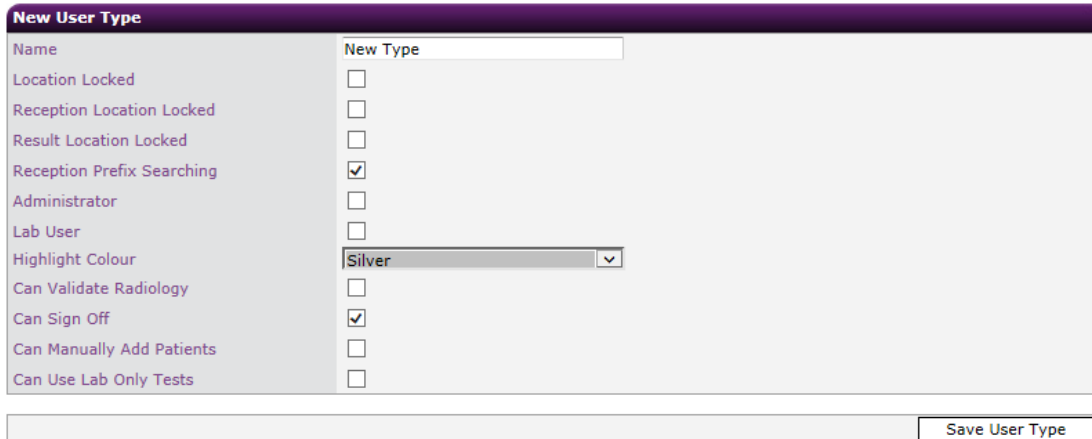
User Types

User Types Overview

Users can be grouped together using User Types. This allows for easier management of dartOCM. Many configuration options, for example test and page permission, are specified at the User Type level.

User Types Management

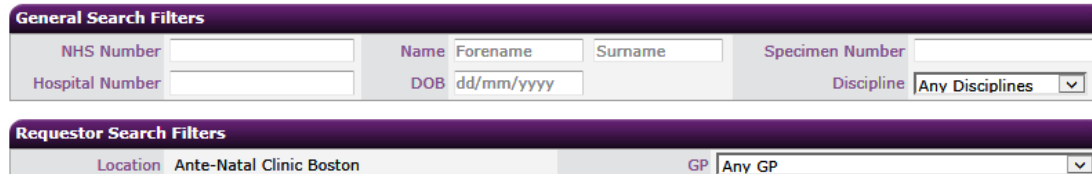
Within the User Types screen you can add and edit user types. To add a new user type, provide a name, set the desired properties and then click Save User Type.



New User Type	
Name	New Type
Location Locked	<input type="checkbox"/>
Reception Location Locked	<input type="checkbox"/>
Result Location Locked	<input type="checkbox"/>
Reception Prefix Searching	<input checked="" type="checkbox"/>
Administrator	<input type="checkbox"/>
Lab User	<input type="checkbox"/>
Highlight Colour	Silver
Can Validate Radiology	<input type="checkbox"/>
Can Sign Off	<input checked="" type="checkbox"/>
Can Manually Add Patients	<input type="checkbox"/>
Can Use Lab Only Tests	<input type="checkbox"/>

Save User Type

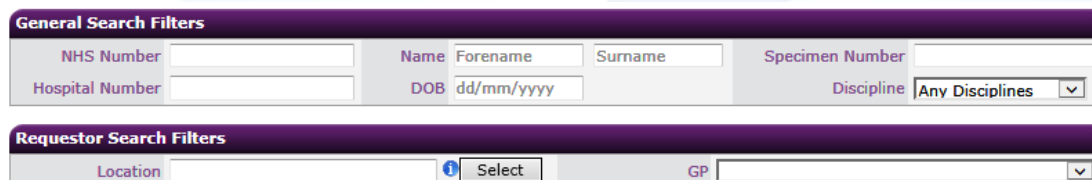
Location Locked – locks the user to one location at a time. For example the Search screen. A Location Locked user will be locked to their current default location.



General Search Filters			
NHS Number	Name Forename Surname	Specimen Number	
Hospital Number	DOB dd/mm/yyyy	Discipline	Any Disciplines

Requestor Search Filters	
Location	Ante-Natal Clinic Boston
GP	Any GP

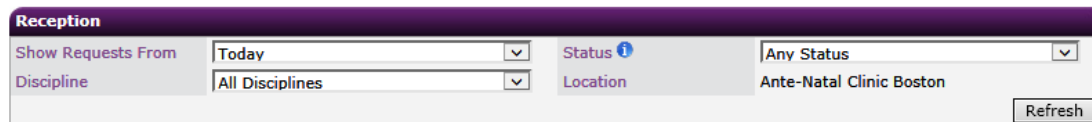
A user not Location Locked defaults to all locations. They can filter by any location by typing and selecting the location in the Location text field.



General Search Filters			
NHS Number	Name Forename Surname	Specimen Number	
Hospital Number	DOB dd/mm/yyyy	Discipline	Any Disciplines

Requestor Search Filters	
Location	Select
GP	Any GP

Reception Location Locked – Similar to the Location Locked property, but specifically for the Reception screen. A Reception Location Locked user will be locked to their current default location.



Reception			
Show Requests From	Today	Status	Any Status
Discipline	All Disciplines	Location	Ante-Natal Clinic Boston

Refresh

A user not Reception Location Locked defaults to all locations. They can filter by any location by typing and selecting the location in the text field.

Reception			
Show Requests From	Today	Status <i>i</i>	Any Status
Discipline	All Disciplines	Location Filter <i>i</i>	
Lab Number Prefix	All Lab Numbers		
			Refresh

Result Location Locked – A user who is Result Location Locked will only be able to view a patients results requested from their current default location. A user who isn't Result Location Locked will be able to see all of a patients results regardless of the requesting location.

Reception Prefix Searching – Adds the Lab Number Prefix drop down to the Reception screen.

Administrator – This flag gives the users various extra privileges to allow them to administer dartOCM. For example the Test Management screen. If a user type is created without the Administrator flag and given access to the Test Management screen users they will see:

+ New Test Group

+ Edit Test Group

If the same user type is given the Administrator flag they will see:

+ New Test

+ Edit Test

+ Edit Test/Discipline Associations

+ Edit Test Containers

+ Orphaned Tests

+ New Test Group

+ Edit Test Group

Lab User – This flag gives the users various extra privileges to allow them to use dartOCM. For example the Cancel button for a request becomes a Reject button. Lab Users can also reinstate a cancelled/rejected request, and add tests to a request that has already been collected.

Highlight Colour – This is the highlight colour used in the User Management screen.

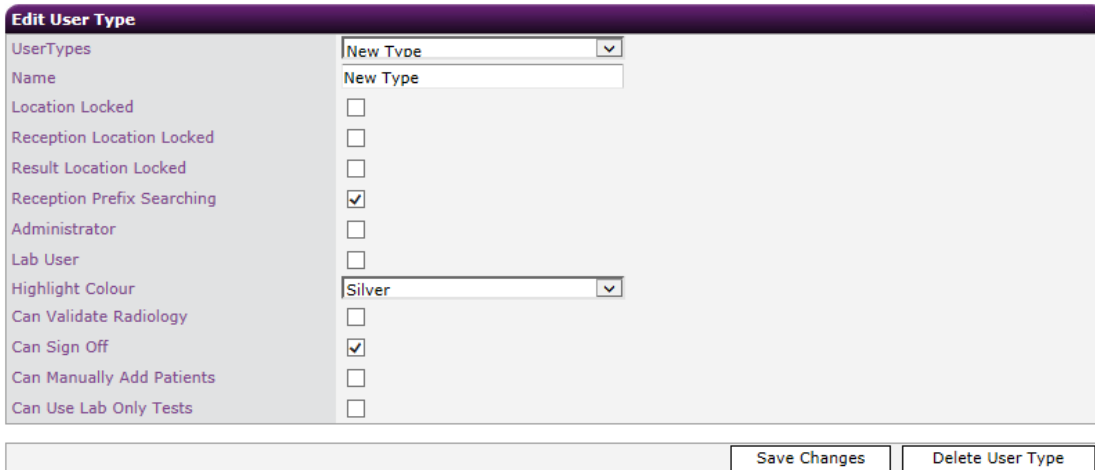
Can Validate Radiology – This is a very basic flag to allow the users to validate radiology requests. If this flag is not set the users cannot validate the request and they have to get someone who can. If any exam permissions are configured via the Exam Permissions screen, this flag is ignored. The Exam Permissions screen gives precise control over who can view/validate each exam.

Can Sign Off – Gives such users the result sign off functionality. Users without this flag set see nothing related to signing off when they are viewing results.

Can Manually Add Patients – This flag allows users to manually add patients if they don't already exist in dartOCM.

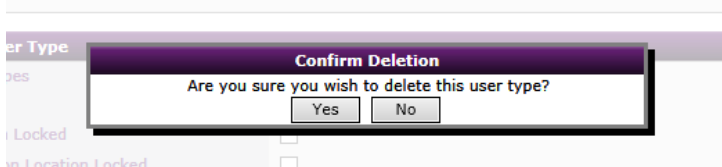
Can Use Lab Only Tests – This flag allows users to add tests that are marked for lab use only.

To edit a User Type select it from the User Types drop down.

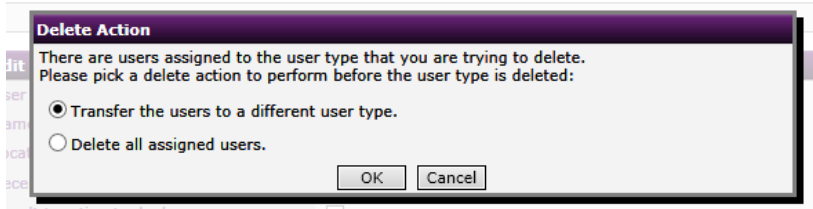


Modify the properties as desired and click Save Changes.

To delete a User Type select it from the User Types drop down. Click Delete User Type.



Click Yes. If there are no users assigned to this user type it will be deleted. If there are users assigned, a warning appears.



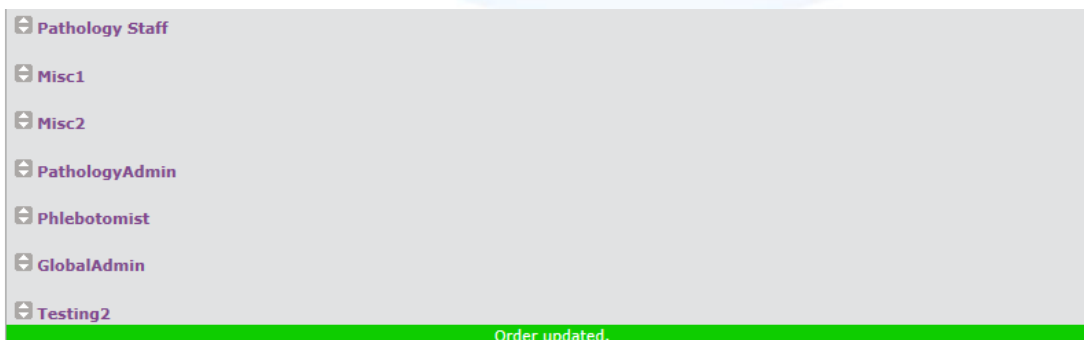
Choose the desired option and click OK.

User Type Grade Overview

User Type Grade is used to rank the user types so in certain screens the users can't see/administer users in a user type with a higher grade.

User Type Grade Management

The User Type hierarchy can be altered by dragging and dropping the user types into the desired order. Once dropped the hierarchy is automatically saved.



Password Policy


Password Policy Overview

Every user in dartOCM must have a password that meets the configured password policy. The complexity of the password policy can be amended via the Password Policy screen.

Password Policy Configuration

The following options can be set.

- The total length of the password.
- The number of numerical characters.
- The number of symbol characters (anything not alphanumeric).
- Whether the password should be a mixture of upper and lower.
- The number of upper case characters.
- The number of lower case characters.



The screenshot shows a dialog box titled "Password Policy" with the following fields and values:

Field	Value
Length:	6
Numeric Characters:	0
Symbol Characters:	0
Upper and Lower Case Characters:	<input type="checkbox"/>
Upper Case Characters:	0
Lower Case Characters:	0

Buttons: OK, Cancel

Once the desired complexity has been set, click 'OK' to save. The policy will be applied when a user next needs to change their password.

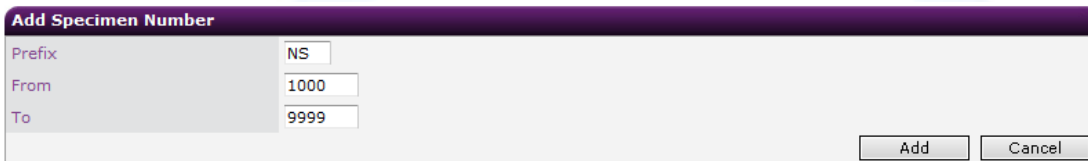
Specimen Numbers

Specimen Number Overview

dartOCM can be configured to automatically assign specimen numbers to requests when they are saved. The specimen number assigned to the request depends on which discipline the request is for and which location it originates from.

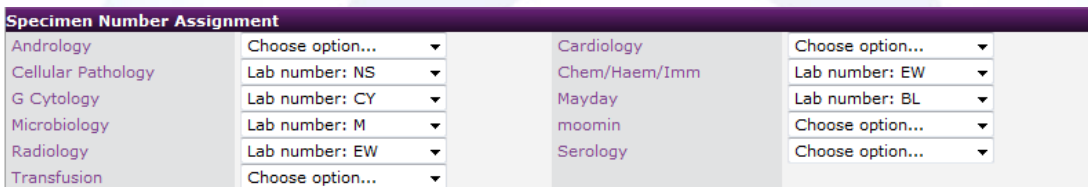
Specimen Number Management

Within the 'Specimen Numbers' screen you can add, edit and delete specimen numbers. Changing existing specimen numbers can have adverse effects on the system and should only be changed with care. To add a new specimen number, enter a prefix, a lower limit and an upper limit.



Add Specimen Number	
Prefix	NS
From	1000
To	9999
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

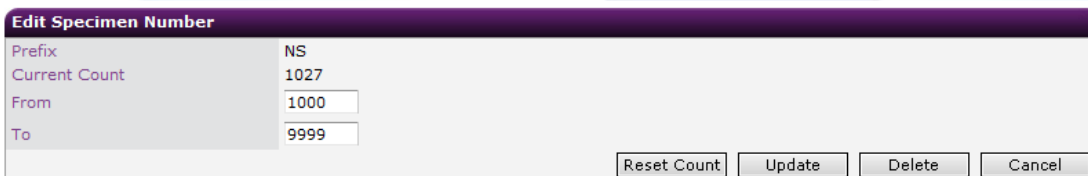
Click 'Add' to add the specimen number to the system or click 'Cancel' to cancel the action. To make the new specimen number available for use it needs to be associated to a location and discipline. This step is performed in the 'Print Management' screen.



Specimen Number Assignment			
Andrology	Choose option...	Cardiology	Choose option...
Cellular Pathology	Lab number: NS	Chem/Haem/Imm	Lab number: EW
G Cytology	Lab number: CY	Mayday	Lab number: BL
Microbiology	Lab number: M	moomin	Choose option...
Radiology	Lab number: EW	Serology	Choose option...
Transfusion	Choose option...		

Edit an existing location and set one of the disciplines to use the new specimen number. Click 'Update' to save the changes to the system. When the requestor from 'New Location' saves a request for Cellular Pathology the specimen number will be prefixed with 'NS' and start counting from 1000. With each new request the counter is incremented up to the upper limit at which point it restarts from the lower limit.

To edit a specimen number, select it from the drop down list.



Edit Specimen Number	
Prefix	NS
Current Count	1027
From	1000
To	9999
<input type="button" value="Reset Count"/> <input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="Cancel"/>	

WARNING: Altering specimen numbers can have an adverse affect over the whole system.

From here you can change the upper and lower limits of the specimen number and click 'Update' to save the changes to the system. The specimen number will be reset and the counter will start from the new lower limit. To reset the specimen number to the lower limit without changing the specimen numbers properties click 'Reset Count'. To cancel the current action, click 'Cancel' or click 'Delete' to remove the specimen number.

Print Management

Print Overview

When a user generates a request within dartOCM it only exists within the system as an electronic request. Each request has the option to print out a physical request form to be attached to the specimen. Ideagen provides SpecimenSaks which incorporate a form, barcode labels and a leak proof specimen wallet.

SpecimenSaks are loaded into the printer like normal paper and the request details printed on to the form and barcodes printed on to the labels. The labels can be removed and placed on to the specimen tubes and the tubes sealed into the back of the SpecimenSak.

There are two options for printing forms:

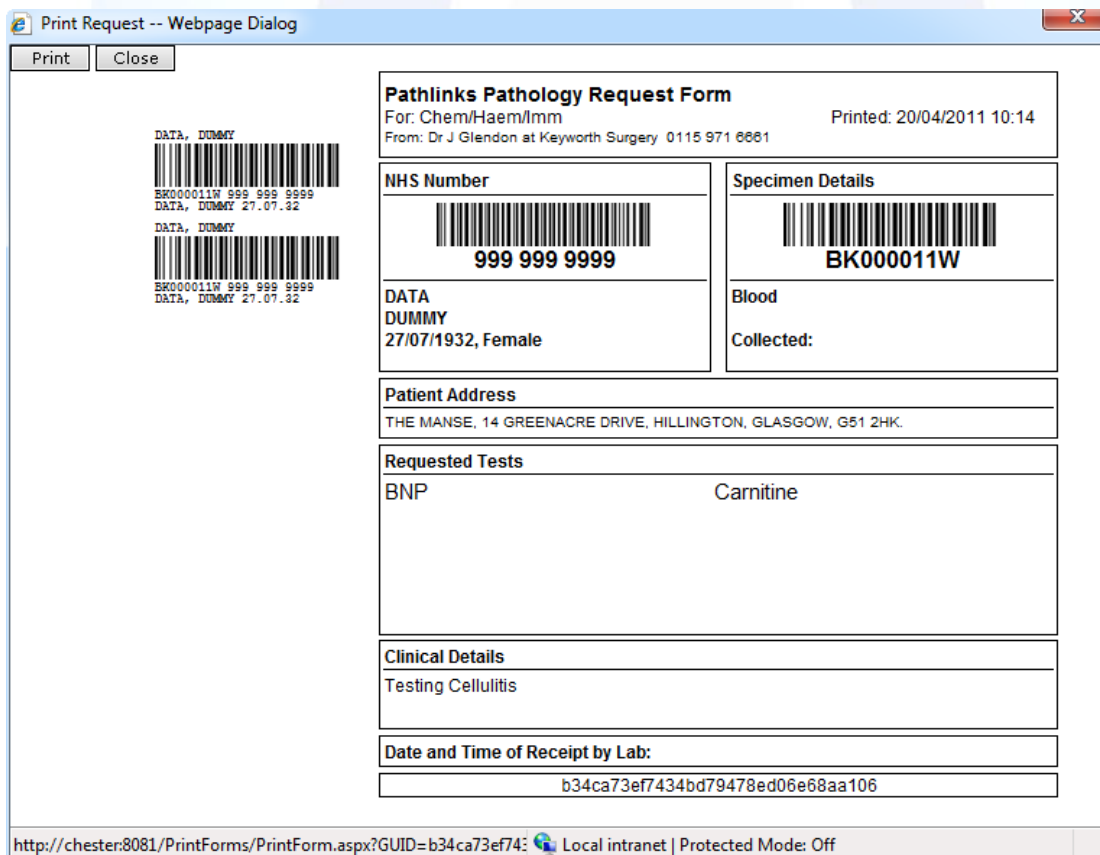
- Normal Internet Explorer printing
- Advanced printing.

Of the two, advanced printing is advised as it gives better control over the printout position and involves less clicks of the mouse.



An alternative to a full request form is the appointment form. A particular specimen type can be configured to print an appointment form rather than the full SpecimenSak request form. The appointment form is given to the patient who takes it to a sample taker. The sample taker collects the sample and prints labels via a label printer for the sample tubes.

Internet Explorer Printing

When the user clicks 'Save and Print' within the request form a new window will open with the request details formatted for printing.

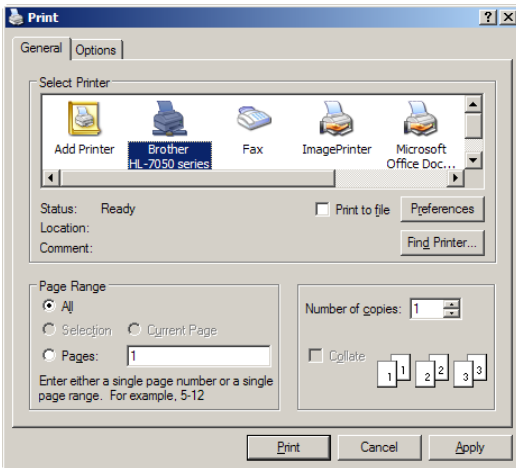


The screenshot shows a web browser window titled "Print Request -- Webpage Dialog" with "Print" and "Close" buttons. The main content is a "Pathlinks Pathology Request Form" for "Chem/Haem/Imm" tests, printed on 20/04/2011 at 10:14. The form is for a patient named "DATA, DUMMY" with NHS number "999 999 9999" and specimen ID "BK000011W". It lists requested tests as "BNP" and "Carnitine". The form also includes patient address, clinical details (Testing Cellulitis), and a date/time of receipt by lab.

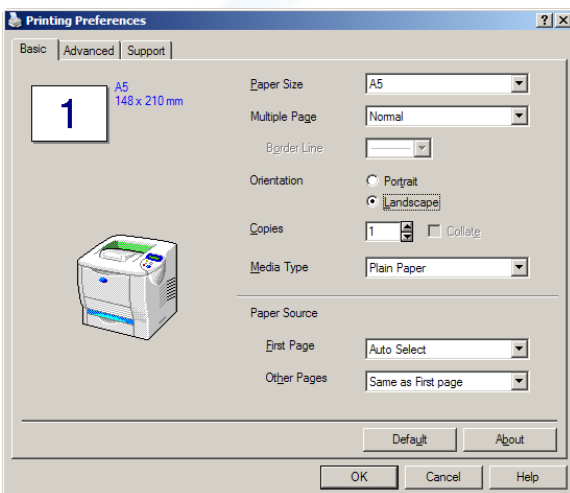
Pathlinks Pathology Request Form	
For: Chem/Haem/Imm	Printed: 20/04/2011 10:14
From: Dr J Glendon at Keyworth Surgery 0115 971 6661	
NHS Number	Specimen Details
 999 999 9999	 BK000011W
DATA DUMMY 27/07/1932, Female	Blood Collected:
Patient Address	
THE MANSE, 14 GREENACRE DRIVE, HILLINGTON, GLASGOW, G51 2HK.	
Requested Tests	
BNP	Carnitine
Clinical Details	
Testing Cellulitis	
Date and Time of Receipt by Lab:	
b34ca73ef7434bd79478ed06e68aa106	

http://chester:8081/PrintForms/PrintForm.aspx?GUID=b34ca73ef74: Local intranet | Protected Mode: Off

Click 'Print' to open the Internet Explorer print dialog.



Click 'Preferences' and change the settings to A5 and landscape.



Click 'OK' and then 'Print'. The request will now be printed to the selected printer. Internet Explorer does not remember these settings so they must be repeated every time a request is printed.

Advanced Printing Setup

Advanced printing is configured per location. By default locations are not setup to use advanced printing. To configure a location type the name in the 'Location Name' field. As you type, valid location names will appear in a drop down below the field. Select the required location from the drop down and click 'Select'.

To enable or disable advanced printing for the selected location, check or uncheck 'Enable Advanced Printing' respectively. When enabled, all fields will become editable.

Printer Management			
Enable Advanced Printing	<input checked="" type="checkbox"/>		
Location Name	Keyworth Surgery	<input type="button" value="Select"/>	
Printer Name	Microsoft XPS Document Writer		
Label Printer Name	Microsoft XPS Document Writer		
A4 Printer Name	Microsoft XPS Document Writer		
Print Dialog			
Show	<input type="checkbox"/>		
Paper Settings			
Size	<input checked="" type="radio"/> A5 <input type="radio"/> A4	Orientation	<input checked="" type="radio"/> Landscape <input type="radio"/> Portrait
Margins			
Top	8 mm	Bottom	5 mm
Left	5 mm	Right	5 mm

Printer Name – If a valid printer name is not specified in this field the requests will print to the default printer on the machine the user is accessing dartOCM on. If all requests should be printed to a single printer within the location then a valid printer name needs to be entered into this field. The printer name should include the computer name and printer name in the format “\\Computername\Printername”.

Label Printer Name – This field specifies the name of the label printer, which labels will be printed out on. It doesn’t have to be the complete name. For example, if Windows displays the printer “Zebra LP 2824”, “LP 2824” can be entered into this field and the system will find the printer.

A4 Printer Name – If a valid printer name is not specified in this field the requests will print to the default printer on the machine the user is accessing dartOCM on. Some requests are printed to A4 paper i.e. Radiology and cardiology. The printer specified in the Printer Name field will generally be loaded with A5 request forms. The A4 Printer Name is used so these requests can be sent to a printer loaded with A4 paper. The printer name should include the computer name and printer name in the format “\\Computername\Printername”.

Show – Check this box if you would still like to see the Internet Explorer print dialog. This is not recommended as the settings (i.e. A5 and landscape) are not always passed through and will still need to be manually set.

Size – Select which paper size the location will be printing on.

Orientation – Select which paper orientation the request will be printed on.

Margins – Adjusting the margins allows the fine adjustment of the printing position. These fields can be adjusted to make sure the barcodes correctly line up within the labels on the SpecimenSak.

Click ‘**Update**’ to save the changes to the system.

When the user clicks ‘**Save and Print**’ within the request form a new window will open with the request details formatted for printing in the same way as normal Internet Explorer printing. However, with advanced printing enable, when the user clicks ‘**Print**’ the form will be printed to their default printer or specified printer with all the settings specified for their location. The user does not have to go through the process of selecting the settings every time they print a request form.

Specimen Number Assignment

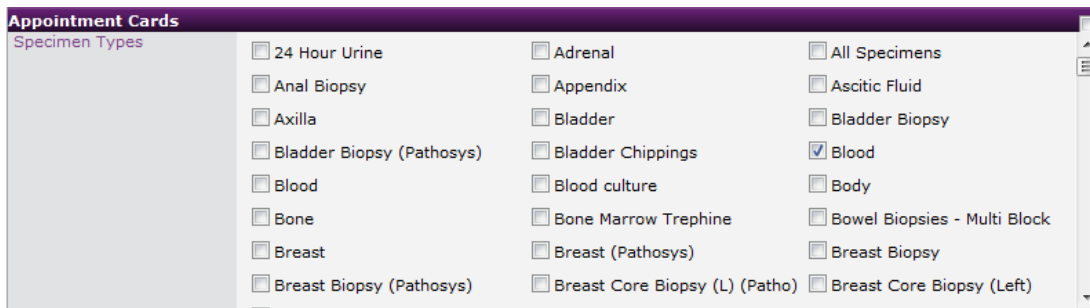
The specimen number prefix and associated number range for each location is configured via the Specimen Number Assignment section.

Specimen Number Assignment			
Andrology	Choose option...	Cardiology	Choose option...
Cellular Pathology	Lab number: NS	Chem/Haem/Imm	Lab number: EW
G Cytology	Lab number: CY	Mayday	Lab number: BL
Microbiology	Lab number: M	moomin	Choose option...
Radiology	Lab number: EW	Serology	Choose option...
Transfusion	Choose option...		

In the above example a requestor Keyworth Surgery will create a Blood Science request and it will be assigned a number from the EW range. The actual prefix added to the specimen number when submitted to the LIMS system varies depending on the individual customer’s requirements.

Appointment Cards

An appointment form can be printed for particular requests. To specify that appointment forms are printed for a particular specimen type, the type needs to be selected in the Appointment Cards section.



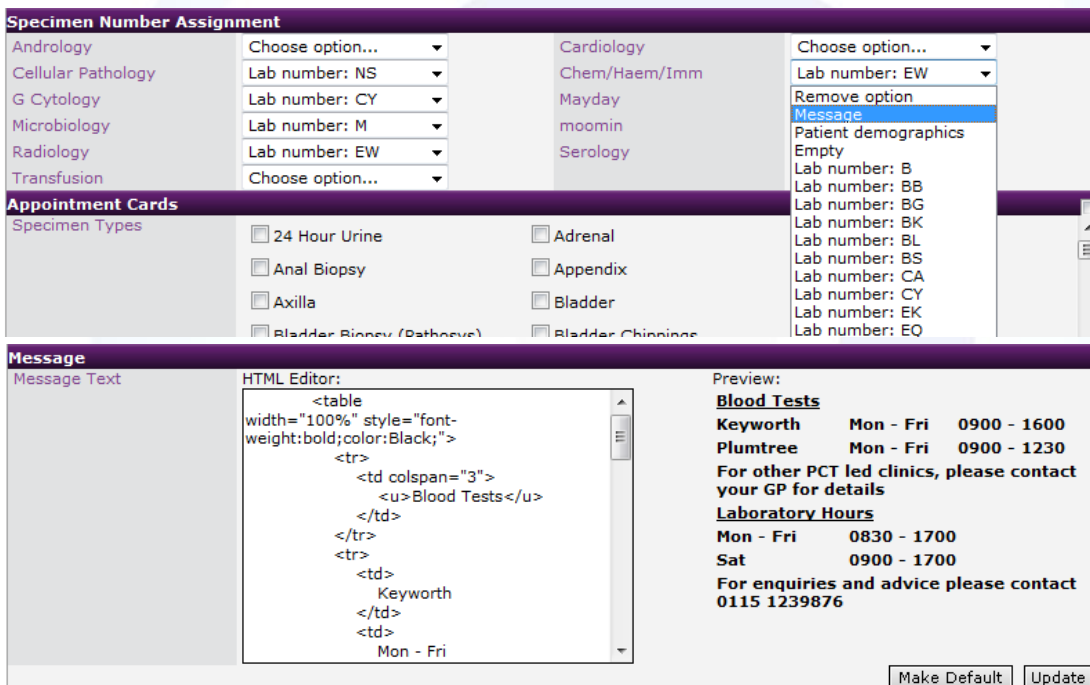
Appointment Cards
Specimen Types

<input type="checkbox"/> 24 Hour Urine	<input type="checkbox"/> Adrenal	<input type="checkbox"/> All Specimens
<input type="checkbox"/> Anal Biopsy	<input type="checkbox"/> Appendix	<input type="checkbox"/> Ascitic Fluid
<input type="checkbox"/> Axilla	<input type="checkbox"/> Bladder	<input type="checkbox"/> Bladder Biopsy
<input type="checkbox"/> Bladder Biopsy (Pathosys)	<input type="checkbox"/> Bladder Chippings	<input checked="" type="checkbox"/> Blood
<input type="checkbox"/> Blood	<input type="checkbox"/> Blood culture	<input type="checkbox"/> Body
<input type="checkbox"/> Bone	<input type="checkbox"/> Bone Marrow Trephine	<input type="checkbox"/> Bowel Biopsies - Multi Block
<input type="checkbox"/> Breast	<input type="checkbox"/> Breast (Pathosys)	<input type="checkbox"/> Breast Biopsy
<input type="checkbox"/> Breast Biopsy (Pathosys)	<input type="checkbox"/> Breast Core Biopsy (L) (Patho)	<input type="checkbox"/> Breast Core Biopsy (Left)

In the above example, a requestor at Keyworth Surgery will print an appointment form when requesting a Blood specimen request. If they made a Bone request a full request form would be printed.

Request Form Content

The Message section of the Print Management screen allows configuration of the left content of the printed request form if a message has been specified for that discipline. The left content can be configured per location and discipline using the Specimen Number Assignment section above. The available options are a message, patient demographics, empty or a specimen number.



Specimen Number Assignment

Andrology	Choose option...	Cardiology	Choose option...
Cellular Pathology	Lab number: NS	Chem/Haem/Imm	Lab number: EW
G Cytology	Lab number: CY	Mayday	Remove option
Microbiology	Lab number: M	moomin	Message
Radiology	Lab number: EW	Serology	Patient demographics
Transfusion	Choose option...		Empty
			Lab number: B
			Lab number: BB
			Lab number: BG
			Lab number: BK
			Lab number: BL
			Lab number: BS
			Lab number: CA
			Lab number: CY
			Lab number: EK
			Lab number: EQ

Appointment Cards
Specimen Types

Message
Message Text

HTML Editor:

```
<table
width="100%" style="font-weight:bold;color:Black;">
<tr>
<td colspan="3">
<u>Blood Tests</u>
</td>
</tr>
<tr>
<td>
Keyworth
</td>
<td>
Mon - Fri
</td>
</tr>
</table>
```




Preview:

Blood Tests
Keyworth Mon - Fri 0900 - 1600
Plumtree Mon - Fri 0900 - 1230
For other PCT led clinics, please contact your GP for details
Laboratory Hours
Mon - Fri 0830 - 1700
Sat 0900 - 1700
For enquiries and advice please contact 0115 1239876

Make Default Update




Message

When a user at a location saves a request for a discipline configured as 'Message' it will be assigned a holding specimen number. When the user prints the request the left content will display the message entered in the print management screen for that location. To edit the message, enter the text in the HTML Editor. The preview will show how it will appear on the form. A valid specimen number will need to be added to the request before it can be submitted.

<p>Blood Tests</p> <p>Keyworth Mon - Fri 0900 - 1600 Plumtree Mon - Fri 0900 - 1230</p> <p>For other PCT led clinics, please contact your GP for details</p> <p>Laboratory Hours</p> <p>Mon - Fri 0830 - 1700 Sat 0900 - 1700</p> <p>For enquiries and advice please contact 0115 1239876</p> <p>An appointment is necessary for Children under 10 years of age Telephone 0115 3216789</p> <p>Please ensure all samples are correctly labelled, unlabelled or poorly labelled samples will not be accepted for testing.</p>	<p>Epsom & St Helier Pathology Request For: Chem/Haem/Imm From: Dr J Glendon at Keyworth Surgery 0115 971 6661</p> <table border="1"> <tr> <th>NHS Number</th> <th>Hospital Number</th> </tr> <tr> <td colspan="2" style="text-align: center;">  8888888888 </td> </tr> </table> <p>DUMMY ISOFT 04/04/1944, Female</p> <p>Patient Address Line 1 of address, line 2 of address, line 3 of address, line</p> <p>Requested Tests 17 Alpha Hydroxy progesterone</p>	NHS Number	Hospital Number	 8888888888	
NHS Number	Hospital Number				
 8888888888					




Patient Demographics

When a user at a location saves a request for a discipline configured as 'Patient Demographics' it will be assigned a holding specimen number. When the user prints the request the left content will display the patient details aligned to the labels on the request form. A valid specimen number will need to be added to the request before it can be submitted.

<p>DUMMY ISOFT P00001270 8888888888 LINE 1 OF ADDRESS LINE 2 OF ADDRESS DUMMY ISOFT 04.04.44 DUMMY ISOFT P00001270 8888888888 LINE 1 OF ADDRESS LINE 2 OF ADDRESS DUMMY ISOFT 04.04.44 DUMMY ISOFT P00001270 8888888888 LINE 1 OF ADDRESS LINE 2 OF ADDRESS DUMMY ISOFT 04.04.44 DUMMY ISOFT P00001270 8888888888 LINE 1 OF ADDRESS LINE 2 OF ADDRESS DUMMY ISOFT 04.04.44 DUMMY ISOFT P00001270 8888888888 LINE 1 OF ADDRESS LINE 2 OF ADDRESS</p>	<p>Epsom & St Helier Pathology Request For: Chem/Haem/Imm From: Dr J Glendon at Keyworth Surgery 0115 971 6661</p> <table border="1"> <tr> <th>NHS Number</th> <th>Hospital Number</th> </tr> <tr> <td colspan="2" style="text-align: center;">  8888888888 </td> </tr> </table> <p>DUMMY ISOFT 04/04/1944, Female</p> <p>Patient Address Line 1 of address, line 2 of address, line 3 of address, line</p> <p>Requested Tests 17 Alpha Hydroxy progesterone</p>	NHS Number	Hospital Number	 8888888888	
NHS Number	Hospital Number				
 8888888888					

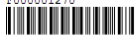

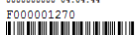
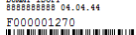
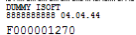



Empty

When a user at a location saves a request for a discipline configured as 'Empty' it will be assigned a holding specimen number. When the user prints the request the left content will be empty. A valid specimen number will need to be added to the request before it can be submitted.

<p style="text-align: center;">P00001270 8888888888 LINE 1 OF ADDRESS LINE 2 OF ADDRESS DUMMY ISOFT 04.04.44 DUMMY ISOFT P00001270 8888888888 LINE 1 OF ADDRESS LINE 2 OF ADDRESS DUMMY ISOFT 04.04.44 DUMMY ISOFT P00001270 8888888888 LINE 1 OF ADDRESS LINE 2 OF ADDRESS DUMMY ISOFT 04.04.44 DUMMY ISOFT P00001270 8888888888 LINE 1 OF ADDRESS LINE 2 OF ADDRESS</p>	<p>Epsom & St Helier Pathology Request For: Chem/Haem/Imm From: Dr J Glendon at Keyworth Surgery 0115 971 6661</p> <table border="1"> <tr> <th>NHS Number</th> <th>Hospital Number</th> </tr> <tr> <td colspan="2" style="text-align: center;">  8888888888 </td> </tr> </table> <p>DUMMY ISOFT 04/04/1944, Female</p> <p>Patient Address Line 1 of address, line 2 of address, line 3 of address, line</p> <p>Requested Tests 17 Alpha Hydroxy progesterone</p>	NHS Number	Hospital Number	 8888888888	
NHS Number	Hospital Number				
 8888888888					

Specimen Number

When a user at a location saves a request for a discipline configured with a 'Specimen number' it will be assigned the next valid specimen number from the range. When the user prints the request the left content will display the patient details with a specimen number barcode aligned to the labels on the request form. The request can be submitted without adding another specimen number.

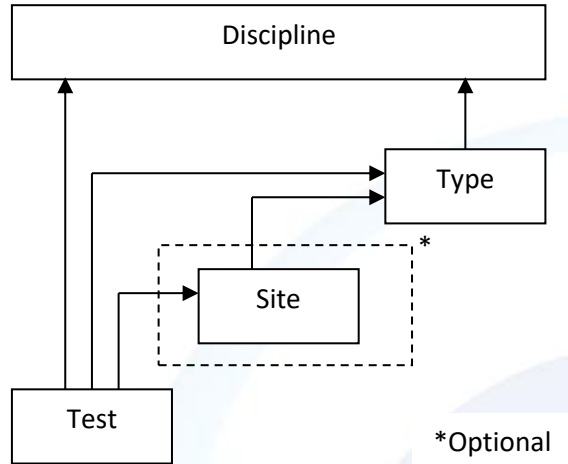
F000001270  <small>ISOFT 04.04.44</small> F000001270  <small>ISOFT 04.04.44</small> F000001270  <small>ISOFT 04.04.44</small> F000001270  <small>ISOFT 04.04.44</small> F000001270  <small>ISOFT 04.04.44</small>	Epsom & St Helier Pathology Reque For: Chem/Haem/Imm From: Dr J Glendon at Keyworth Surgery 0115 971 6661						
	<table border="1"> <tr> <th>NHS Number</th> <th>Hospital Number</th> </tr> <tr> <td></td> <td></td> </tr> <tr> <td>8888888888</td> <td></td> </tr> </table>	NHS Number	Hospital Number			8888888888	
NHS Number	Hospital Number						
							
8888888888							
	DUMMY ISOFT 04/04/1944, Female						
	Patient Address <small>Line 1 of address, line 2 of address, line 3 of address, line</small>						
	Requested Tests 17 Alpha Hydroxy progesterone						

To assign the currently displayed settings to be the default for all unconfigured locations click 'Make Default'. To make the changes to the selected location only click 'Update'.

Test Management

Discipline, Specimen Type and Specimen Site Relationship

For a test to be visible on the request screen for a selected discipline, type and site combination, the test has to be associated with the discipline, type and site in the combination. This relationship is shown below:



Tests are linked to disciplines and types. If the type has a site then the test is linked to the site as well. Sites are linked to types and types are linked to disciplines. There are four management pages that allow the configuration of disciplines, types, sites, tests and their relationships.

Discipline Management Page

Through this screen disciplines can be edited and deleted. To edit or delete a discipline, select it from the drop down list.

Edit Discipline

Discipline	<input type="text" value="Chem/Haem"/>
Discipline Code	<input type="text" value="H"/>
Description	<input type="text" value="Chem/Haem"/>
Default Specimen Type	<input type="text" value="Blood"/>
New Request Discipline	<input type="text" value="Chem/Haem"/>

Not all the options below are implemented by every discipline. For example, Show Antibiotics will have no affect on the Radiology Request screen. The Request Split Options are only for Blood/Micro type disciplines.

Show Specimen Sites	<input type="checkbox"/>
Show Inoculation Risk	<input type="checkbox"/>
Show Coded Clinical Details	<input checked="" type="checkbox"/>
Allow Repeating Requests	<input type="checkbox"/>
Clinical Details Are Mandatory	<input checked="" type="checkbox"/>
Show Antibiotic Therapies	<input type="checkbox"/>
Antibiotics Are Mandatory	<input type="checkbox"/>
Show Registered GP	<input type="checkbox"/>
Send Reject Message	<input type="checkbox"/>
Send Cancel Message	<input type="checkbox"/>
Show Fasting	<input checked="" type="checkbox"/>

Request Split Options

	SplitAtSave	NeedTypeConfirm	By/Discipline	By/SpecimenType	By/SpecimenSite	By/SampleContainers	By/LabNumber	SplitAtCollection	NeedTypeConfirm	By/Discipline	By/SpecimenType	By/SpecimenSite	By/SampleContainers	By/LabNumber	SplitAtSubmittal	NeedTypeConfirm	By/Discipline	By/SpecimenType	By/SpecimenSite	By/SampleContainers	By/LabNumber	
FormType																						
FullRequest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Domiciliary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Amend the properties and click 'Save Changes' or click 'Delete Discipline' to remove it from the system. When a discipline has associated specimen types a default one can be set. The default specimen type will be automatically selected when the user selects the discipline from the drop down on the request form. When viewing a request or result for a discipline and click 'new request' it will go to the discipline specified by New Request Discipline. Some disciplines are built in to the system and cannot be deleted, but can be edited.

The Request Split Options control how a requests is split at various points during it's life. Ideally this section should only be modified by Ideagen as it can have a big impact on how dartOCM behaves.

Type Management Page

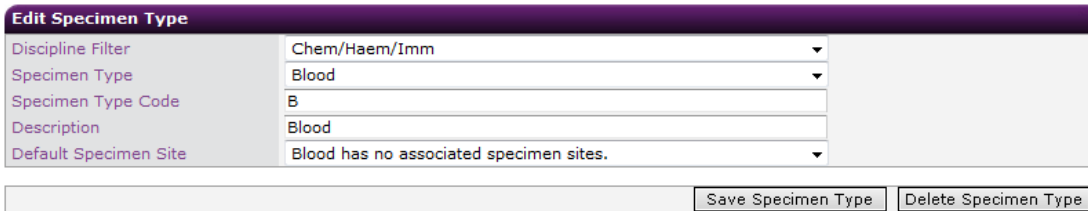
Through this screen specimen types can be created, edited, deleted and linked to disciplines. To create a new type, enter the code, description and select the disciplines to link to. Click 'Save Specimen Type' to save it to the system.

New Specimen Type

Specimen Type Code	<input type="text" value="NTYPE"/>												
Description	<input type="text" value="New Type"/>												
Associate Discipline	<table style="width: 100%; border-collapse: collapse;"> <tr> <td><input type="checkbox"/> Andrology</td> <td><input type="checkbox"/> Cardiology</td> </tr> <tr> <td><input type="checkbox"/> Cellular Pathology</td> <td><input checked="" type="checkbox"/> Chem/Haem/Imm</td> </tr> <tr> <td><input type="checkbox"/> G Cytology</td> <td><input type="checkbox"/> Mayday</td> </tr> <tr> <td><input type="checkbox"/> Microbiology</td> <td><input type="checkbox"/> moomin</td> </tr> <tr> <td><input type="checkbox"/> Radiology</td> <td><input type="checkbox"/> Serology</td> </tr> <tr> <td><input type="checkbox"/> Transfusion</td> <td></td> </tr> </table>	<input type="checkbox"/> Andrology	<input type="checkbox"/> Cardiology	<input type="checkbox"/> Cellular Pathology	<input checked="" type="checkbox"/> Chem/Haem/Imm	<input type="checkbox"/> G Cytology	<input type="checkbox"/> Mayday	<input type="checkbox"/> Microbiology	<input type="checkbox"/> moomin	<input type="checkbox"/> Radiology	<input type="checkbox"/> Serology	<input type="checkbox"/> Transfusion	
<input type="checkbox"/> Andrology	<input type="checkbox"/> Cardiology												
<input type="checkbox"/> Cellular Pathology	<input checked="" type="checkbox"/> Chem/Haem/Imm												
<input type="checkbox"/> G Cytology	<input type="checkbox"/> Mayday												
<input type="checkbox"/> Microbiology	<input type="checkbox"/> moomin												
<input type="checkbox"/> Radiology	<input type="checkbox"/> Serology												
<input type="checkbox"/> Transfusion													

When making a request, 'New Type' will appear in the specimen type drop down list when Blood Science is selected.

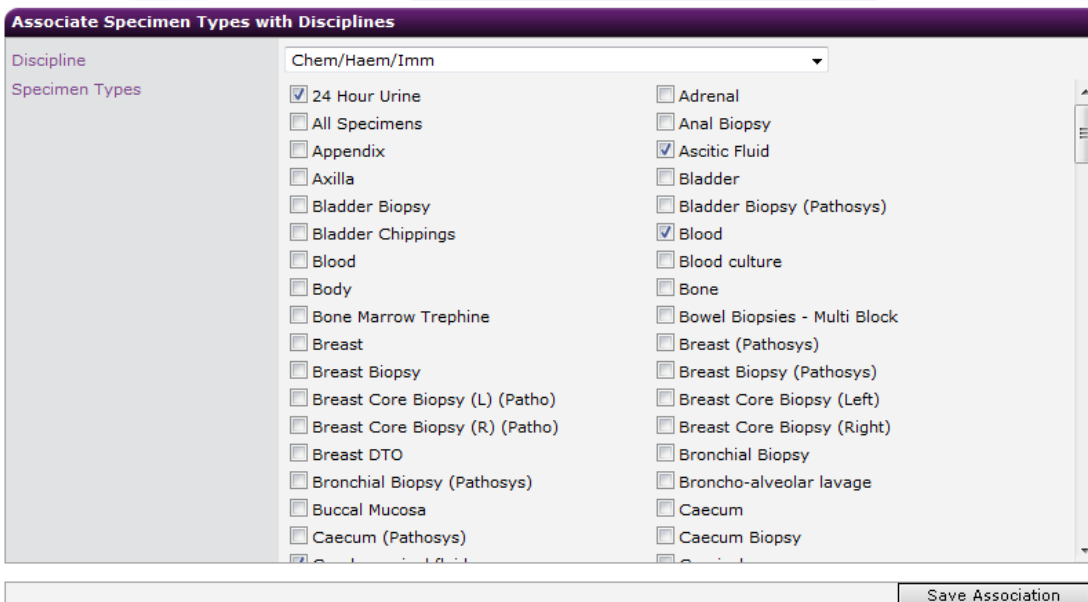
To edit or delete a specimen type, select it from the drop down list.



The number of specimen types in the specimen type drop down can be reduced by filtering by a particular discipline. Amend the specimen type code and/or expansion and click 'Save Changes' or click 'Delete Specimen Type' to remove it from the system.

Initially a new specimen type will not have any specimen sites associated with it. To set a default specimen site firstly associate the required specimen sites to the specimen type via the Specimen Site Management screen. When a specimen type has associated specimen sites a default one can be set. The default specimen site will be automatically selected when the user selects the specimen type from the drop down on the request form.

To change which specimen types are linked to a discipline, select a discipline and check/uncheck as required. Click 'Save Associations' to save the changes to the system.



Site Management Page

Through this screen specimen sites can be created, edited, deleted and linked to specimen types. To create a new site, enter the code, description, select a site type and select the types to link to. Click 'Save Specimen Site' to save it to the system.

The site type may not be relevant to your location, in which case the type can be left as 'Site'.

New Specimen Site

Specimen Site Code	<input type="text" value="NSITE"/>		
Description	<input type="text" value="New Site"/>		
Specimen Site Type	<input checked="" type="radio"/> Site <input type="radio"/> Qualifier <input type="radio"/> Lesion		
Discipline Filter	Filter specimen types by discipline... <div style="border: 1px solid #ccc; height: 15px; width: 100%;"></div>		
Associate Specimen Type	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> 24 Hour Urine <input type="checkbox"/> All Specimens <input checked="" type="checkbox"/> Appendix <input type="checkbox"/> Axilla <input type="checkbox"/> Bladder Biopsy <input type="checkbox"/> Bladder Chippings <input type="checkbox"/> Blood <input type="checkbox"/> Body <input type="checkbox"/> Bone Marrow Trephine <input type="checkbox"/> Breast <input type="checkbox"/> Breast Biopsy <input type="checkbox"/> Breast Core Biopsy (L) (Patho) </td> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> Adrenal <input type="checkbox"/> Anal Biopsy <input type="checkbox"/> Ascitic Fluid <input type="checkbox"/> Bladder <input type="checkbox"/> Bladder Biopsy (Pathosys) <input checked="" type="checkbox"/> Blood <input type="checkbox"/> Blood culture <input type="checkbox"/> Bone <input type="checkbox"/> Bowel Biopsies - Multi Block <input type="checkbox"/> Breast (Pathosys) <input type="checkbox"/> Breast Biopsy (Pathosys) <input type="checkbox"/> Breast Core Biopsy (Left) </td> </tr> </table>	<input type="checkbox"/> 24 Hour Urine <input type="checkbox"/> All Specimens <input checked="" type="checkbox"/> Appendix <input type="checkbox"/> Axilla <input type="checkbox"/> Bladder Biopsy <input type="checkbox"/> Bladder Chippings <input type="checkbox"/> Blood <input type="checkbox"/> Body <input type="checkbox"/> Bone Marrow Trephine <input type="checkbox"/> Breast <input type="checkbox"/> Breast Biopsy <input type="checkbox"/> Breast Core Biopsy (L) (Patho)	<input type="checkbox"/> Adrenal <input type="checkbox"/> Anal Biopsy <input type="checkbox"/> Ascitic Fluid <input type="checkbox"/> Bladder <input type="checkbox"/> Bladder Biopsy (Pathosys) <input checked="" type="checkbox"/> Blood <input type="checkbox"/> Blood culture <input type="checkbox"/> Bone <input type="checkbox"/> Bowel Biopsies - Multi Block <input type="checkbox"/> Breast (Pathosys) <input type="checkbox"/> Breast Biopsy (Pathosys) <input type="checkbox"/> Breast Core Biopsy (Left)
<input type="checkbox"/> 24 Hour Urine <input type="checkbox"/> All Specimens <input checked="" type="checkbox"/> Appendix <input type="checkbox"/> Axilla <input type="checkbox"/> Bladder Biopsy <input type="checkbox"/> Bladder Chippings <input type="checkbox"/> Blood <input type="checkbox"/> Body <input type="checkbox"/> Bone Marrow Trephine <input type="checkbox"/> Breast <input type="checkbox"/> Breast Biopsy <input type="checkbox"/> Breast Core Biopsy (L) (Patho)	<input type="checkbox"/> Adrenal <input type="checkbox"/> Anal Biopsy <input type="checkbox"/> Ascitic Fluid <input type="checkbox"/> Bladder <input type="checkbox"/> Bladder Biopsy (Pathosys) <input checked="" type="checkbox"/> Blood <input type="checkbox"/> Blood culture <input type="checkbox"/> Bone <input type="checkbox"/> Bowel Biopsies - Multi Block <input type="checkbox"/> Breast (Pathosys) <input type="checkbox"/> Breast Biopsy (Pathosys) <input type="checkbox"/> Breast Core Biopsy (Left)		

'New Site' will appear in the specimen site drop down list when making a request where 'Blood' or 'Appendix' is selected.

To edit or delete a specimen site, select it from the drop down list.

Edit Specimen Site

Discipline Filter	Filter specimen types by discipline... <div style="border: 1px solid #ccc; height: 15px; width: 100%;"></div>
Specimen Type Filter	Filter specimen sites by specimen type... <div style="border: 1px solid #ccc; height: 15px; width: 100%;"></div>
Specimen Site	New Site <div style="border: 1px solid #ccc; height: 15px; width: 100%;"></div>
Specimen Site Code	<input type="text" value="SITE"/>
Description	<input type="text" value="New Site"/>
Specimen Site Type	<input checked="" type="radio"/> Site <input type="radio"/> Qualifier <input type="radio"/> Lesion

The number of specimen sites in the specimen site drop down can be reduced by filtering by a particular discipline and type. Amend the specimen site details and click 'Save Changes' or click 'Delete Specimen Site' to remove it from the system.

To change which specimen sites are linked to a specimen type, select a type and check/uncheck as required. Click 'Save Associations' to save the changes to the system.

Associate Specimen Sites with Specimen Types

Discipline Filter:

Specimen Type:

Specimen Sites:

<input type="checkbox"/> Aqueous tap/anterior chamber	<input type="checkbox"/> Arterial line
<input type="checkbox"/> Arterial line tip	<input type="checkbox"/> Ascitic fluid
<input checked="" type="checkbox"/> Bag specimen	<input checked="" type="checkbox"/> Bile
<input type="checkbox"/> Blue line	<input checked="" type="checkbox"/> Catheter specimen
<input type="checkbox"/> Central Line	<input checked="" type="checkbox"/> Clean catch
<input type="checkbox"/> CVP line tip	<input type="checkbox"/> Ear
<input checked="" type="checkbox"/> Early morning	<input type="checkbox"/> Elbow aspirate
<input type="checkbox"/> Endocervical	<input type="checkbox"/> Endocervical swab
<input type="checkbox"/> Epidural tip	<input type="checkbox"/> ETT secretions
<input type="checkbox"/> Eye	<input type="checkbox"/> Eye swab
<input type="checkbox"/> Femoral stab	<input type="checkbox"/> Finger
<input checked="" type="checkbox"/> First Void	<input type="checkbox"/> First Void urine
<input type="checkbox"/> Foreskin	<input type="checkbox"/> Gastrostomy fluid
<input type="checkbox"/> Glans penis	<input type="checkbox"/> Hickman line
<input type="checkbox"/> High vaginal	<input type="checkbox"/> Hip aspirate
<input type="checkbox"/> Joint aspirate	<input type="checkbox"/> Knee aspirate
<input type="checkbox"/> Low vagina/introitus	<input checked="" type="checkbox"/> Mid-stream

Test Management Page

Through this screen tests can be created, edited, deleted and linked to sites, types and disciplines. To create a test, enter the code and description.

— New Test

Code:

Description:

Orderable Associations:

Other Associations:

Default Association:

Override Sample Containers:

Samples:

1.	<input type="text" value="None"/>	vol: <input type="text" value="0"/>	2.	<input type="text" value="None"/>	vol: <input type="text" value="0"/>	3.	<input type="text" value="None"/>	vol: <input type="text" value="0"/>	4.	<input type="text" value="None"/>	vol: <input type="text" value="0"/>
----	-----------------------------------	-------------------------------------	----	-----------------------------------	-------------------------------------	----	-----------------------------------	-------------------------------------	----	-----------------------------------	-------------------------------------

Paediatric Samples:

1.	<input type="text" value="None"/>	vol: <input type="text" value="0"/>	2.	<input type="text" value="None"/>	vol: <input type="text" value="0"/>	3.	<input type="text" value="None"/>	vol: <input type="text" value="0"/>	4.	<input type="text" value="None"/>	vol: <input type="text" value="0"/>
----	-----------------------------------	-------------------------------------	----	-----------------------------------	-------------------------------------	----	-----------------------------------	-------------------------------------	----	-----------------------------------	-------------------------------------

For Lab Use Only:

External Help URL:

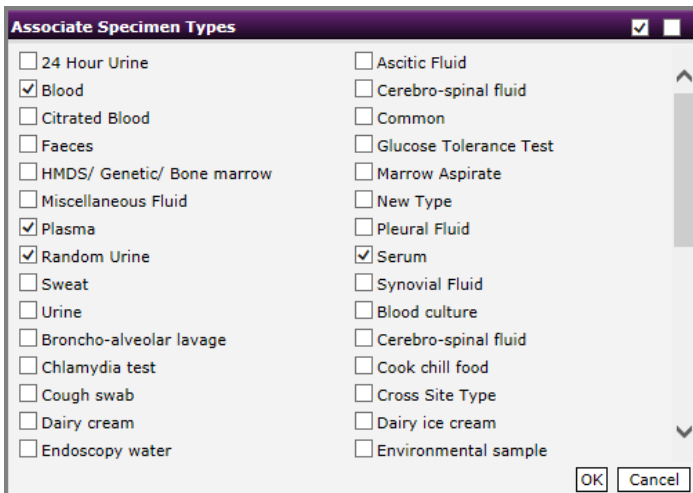
Synonyms:

Next, choose the Orderable Associations the test will be linked to by clicking 'Set'. Orderable Associations are the discipline/type/site combinations that the test can be sent to the LIMS with and the LIMS will not reject the order. For example a Full Blood Count test can have an orderable association with Blood Sciences/Blood, but not Microbiology/Urine/Mid Stream.

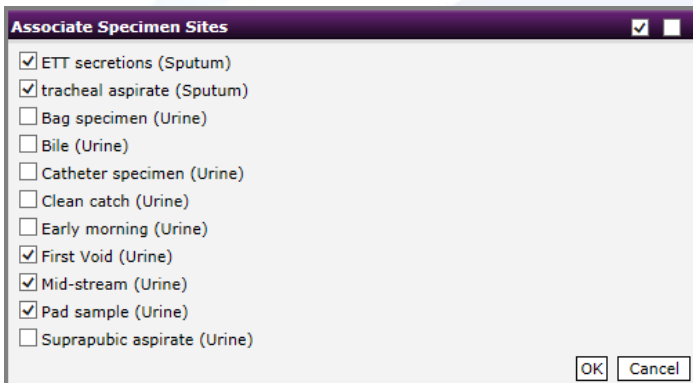
Associate Disciplines

<input type="checkbox"/> Andrology	<input type="checkbox"/> Cardiology
<input type="checkbox"/> Cellular Pathology	<input checked="" type="checkbox"/> Chem/Haem
<input type="checkbox"/> Combined	<input type="checkbox"/> DFT
<input type="checkbox"/> G Cytology	<input type="checkbox"/> Mayday
<input checked="" type="checkbox"/> Microbiology	<input type="checkbox"/> moomin
<input type="checkbox"/> Radiology	<input type="checkbox"/> Serology
<input type="checkbox"/> Transfusion	

Select the disciplines first and click 'OK'.



The next popup will only have the specimen types linked to the disciplines selected in the previous popup. Select the required types and click 'OK'.



If there are any specimen sites linked to the selected specimen types another popup will appear. Select the required sites and click 'OK'.

New Test

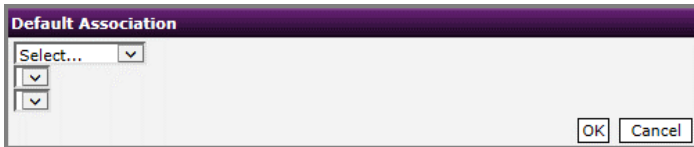
Code	<input type="text" value="NTEST"/>
Description	<input type="text" value="New Test"/>
Orderable Associations	<input type="button" value="Set"/> Chem/Haem Blood Plasma Random Urine Serum Microbiology Sputum ETT secretions tracheal aspirate Urine First Void Mid-stream Pad sample
Other Associations	<input type="button" value="Set"/>
Default Association	<input type="button" value="Set"/>
Sub Discipline	<input type="radio"/> Chemistry <input type="radio"/> Haematology <input type="radio"/> Immunology
Override Sample Containers	<input type="checkbox"/>
Samples	1. <input type="text" value="None"/> vol: <input type="text" value="0"/> 2. <input type="text" value="None"/> vol: <input type="text" value="0"/> 3. <input type="text" value="None"/> vol: <input type="text" value="0"/> 4. <input type="text" value="None"/> vol: <input type="text" value="0"/>
Paediatric Samples	1. <input type="text" value="None"/> vol: <input type="text" value="0"/> 2. <input type="text" value="None"/> vol: <input type="text" value="0"/> 3. <input type="text" value="None"/> vol: <input type="text" value="0"/> 4. <input type="text" value="None"/> vol: <input type="text" value="0"/>
For Lab Use Only	<input type="checkbox"/>
Lab Number Prefixes	EK <input type="checkbox"/> EQ <input type="checkbox"/> EW <input type="checkbox"/> M <input type="checkbox"/>
External Help URL	<input type="text"/>
Synonyms	<div style="border: 1px solid #ccc; height: 40px;"></div>

If desired the test can be configured to show under other discipline/type/site combinations using Other Associations. The selection process is the same as for Orderable Associations.

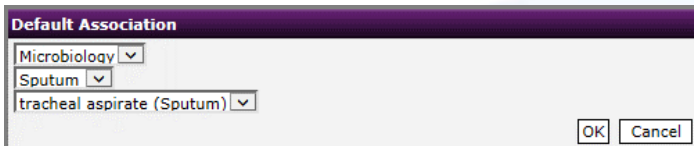
New Test

Code	<input type="text" value="NTEST"/>
Description	<input type="text" value="New Test"/>
Orderable Associations	<input type="button" value="Set"/> Chem/Haem Blood Plasma Random Urine Serum Microbiology Sputum ETT secretions tracheal aspirate Urine First Void Mid-stream Pad sample
Other Associations	<input type="button" value="Set"/> Combined Common
Default Association	<input type="button" value="Set"/>
Sub Discipline	<input type="radio"/> Chemistry <input type="radio"/> Haematology <input type="radio"/> Immunology
Override Sample Containers	<input type="checkbox"/>
Samples	1. <input type="text" value="None"/> vol: <input type="text" value="0"/> 2. <input type="text" value="None"/> vol: <input type="text" value="0"/> 3. <input type="text" value="None"/> vol: <input type="text" value="0"/> 4. <input type="text" value="None"/> vol: <input type="text" value="0"/>
Paediatric Samples	1. <input type="text" value="None"/> vol: <input type="text" value="0"/> 2. <input type="text" value="None"/> vol: <input type="text" value="0"/> 3. <input type="text" value="None"/> vol: <input type="text" value="0"/> 4. <input type="text" value="None"/> vol: <input type="text" value="0"/>
For Lab Use Only	<input type="checkbox"/>
Lab Number Prefixes	EK <input type="checkbox"/> EQ <input type="checkbox"/> EW <input type="checkbox"/> M <input type="checkbox"/>
External Help URL	<input type="text"/>
Synonyms	<div style="border: 1px solid #ccc; height: 40px;"></div>

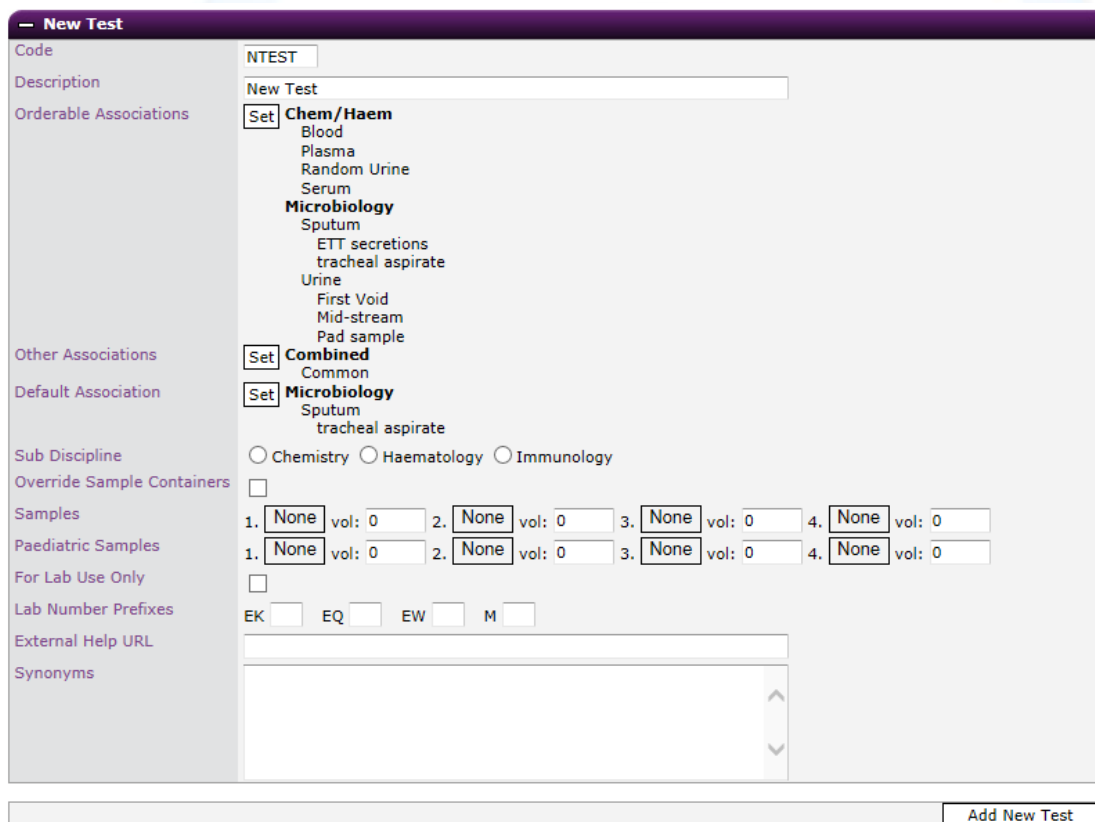
The test will now be available when the user creates a combined/common request. However, if dartOCM tried to send this test to the LIMS with combined/common, LIMS would reject it. Prior to sending to the LIMS dartOCM needs to move the test onto an Orderable Association. To help this the test needs to be given a Default Association. Click 'Set' to start the process.



The drop down boxes are only populated with the Orderable Associations.



Select the default association and click 'OK'.




When linking a test to the blood sciences discipline an extra optional field 'Sub-discipline' is shown. Selecting one of the radio buttons will associate the test with one of the three sub disciplines for blood sciences. Specifying a sub discipline for a test affects where it appears on the request form. When making a new combined sciences request the tests are grouped by their sub discipline. Immunology tests are rendered first followed by haematology tests, followed by chemistry tests. Any tests without a sub discipline are rendered at the end.

For details on configuring the Sample Container sections please consult the 'dartOCM Sample Containers Quick Guide' document.

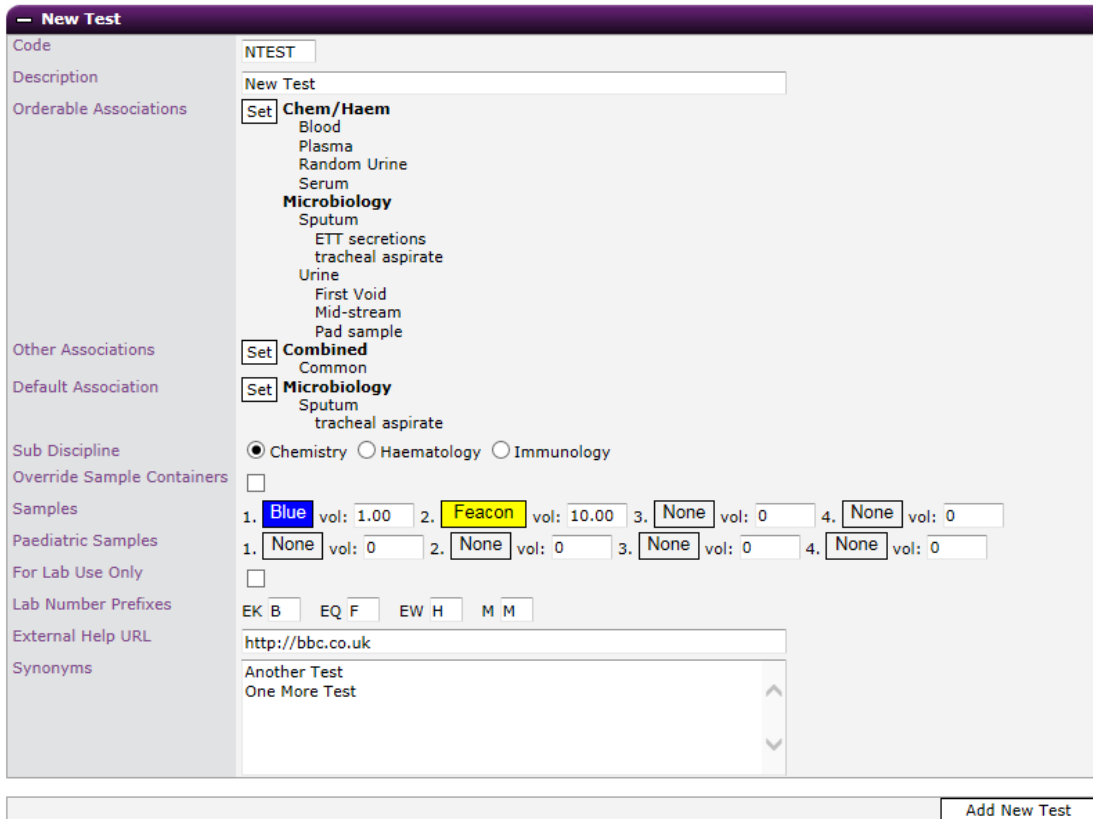
Lab Number Prefixes can be used to specify the prefix the lab number should have for this test. It is only relevant for certain customers and is part of the wider Lab Number logic.

If the test should only be added by the laboratory, tick “For Lab Use Only”. The test will not be visible for Users without the Can Use Lab Only Tests property selected for their User Type. Users who can’t add such tests can see them on a request if added by someone who can.

Each test can be given an External Help URL. When specified an icon  appears next to the test on the request screen. Clicking the icon launches the URL in a separate window.

On the requests screen the Find Test functionality is used to find tests by typing the test name or part of the test name. It will also search test synonyms. A test’s synonyms can be specified via Synonym field, one line per synonym.

Click ‘Add New Test’ to add it to the system.



— New Test

Code: NTEST

Description: New Test

Orderable Associations:

- Chem/Haem**
 - Blood
 - Plasma
 - Random Urine
 - Serum
- Microbiology**
 - Sputum
 - ETT secretions
 - tracheal aspirate
 - Urine
 - First Void
 - Mid-stream
 - Pad sample

Other Associations:

- Combined**
 - Common

Default Association:

- Microbiology**
 - Sputum
 - tracheal aspirate

Sub Discipline:

- Chemistry
- Haematology
- Immunology

Override Sample Containers:

Samples:

1. Blue vol: 1.00	2. Feacon vol: 10.00	3. None vol: 0	4. None vol: 0
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Paediatric Samples:

1. None vol: 0	2. None vol: 0	3. None vol: 0	4. None vol: 0
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For Lab Use Only:

Lab Number Prefixes: EK B EQ F EW H M M

External Help URL: <http://bbc.co.uk>

Synonyms:

- Another Test
- One More Test

Add New Test

To edit or delete a test, select it from the drop down list.

— Edit Test

Discipline Filter	<input type="text" value="Chem/Haem"/>
Specimen Type Filter	<input type="text" value="Filter tests by specimen type..."/>
Test	<input type="text" value="New Test"/>
Code	<input type="text" value="NTEST"/>
Description	<input type="text" value="New Test"/>
Orderable Associations	<input type="checkbox"/> Chem/Haem Blood Plasma Random Urine Serum Microbiology Sputum ETT secretions tracheal aspirate Urine First Void Mid-stream Pad sample
Other Associations	<input type="checkbox"/> Combined Common
Default Association	<input type="checkbox"/> Microbiology Sputum tracheal aspirate
Override Sample Containers	<input type="checkbox"/>
Samples	1. <input type="text" value="Blue"/> vol: 1.00 2. <input type="text" value="Feacon"/> vol: 10.00 3. <input type="text" value="None"/> vol: 0 4. <input type="text" value="None"/> vol: 0
Paediatric Samples	1. <input type="text" value="None"/> vol: 0 2. <input type="text" value="None"/> vol: 0 3. <input type="text" value="None"/> vol: 0 4. <input type="text" value="None"/> vol: 0
For Lab Use Only	<input type="checkbox"/>
Lab Number Prefixes	<input type="checkbox"/> EK B <input type="checkbox"/> EQ F <input type="checkbox"/> EW H <input type="checkbox"/> M M
External Help URL	<input type="text" value="http://bbc.co.uk"/>
Synonyms	<input type="text" value="Another Test"/> <input type="text" value="One More Test"/>
Destructive Test Group	<input type="text" value="0"/> Current Test Groups

The number of test in the test drop down can be reduced by filtering by a particular discipline and specimen type. Amend the test details and click 'Save Changes' or click 'Delete Test' to remove it from the system.

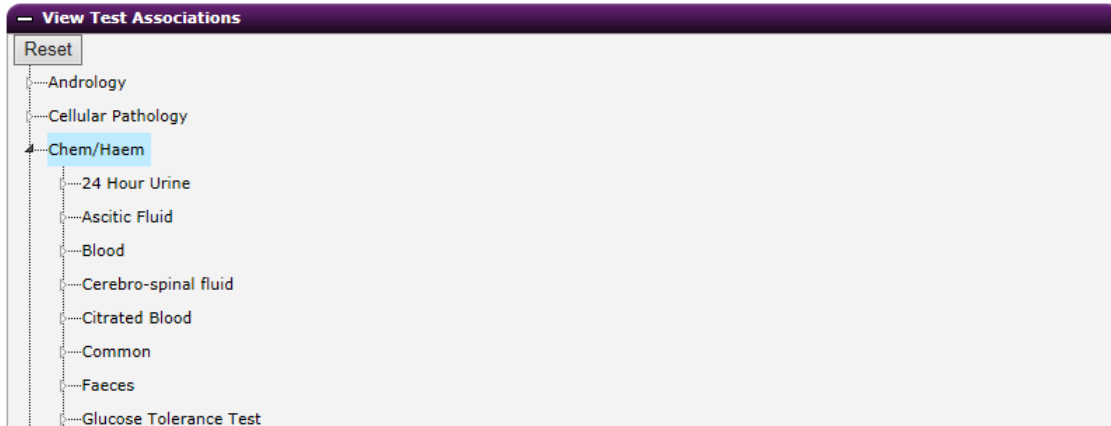
An alternate way to view and edit tests is via the View Test Associations section.

— View Test Associations

- Andrology
- Cellular Pathology
- Chem/Haem
- Combined
- DFT
- Mayday
- Microbiology
- Serology
- Transfusion

* Test is configured to show under this branch via Cross Specimen Requesting.
 ** Double click an item to expand the whole branch.

It starts collapsed at the discipline level. Clicking on a discipline will expand it to show the types associated with that discipline.

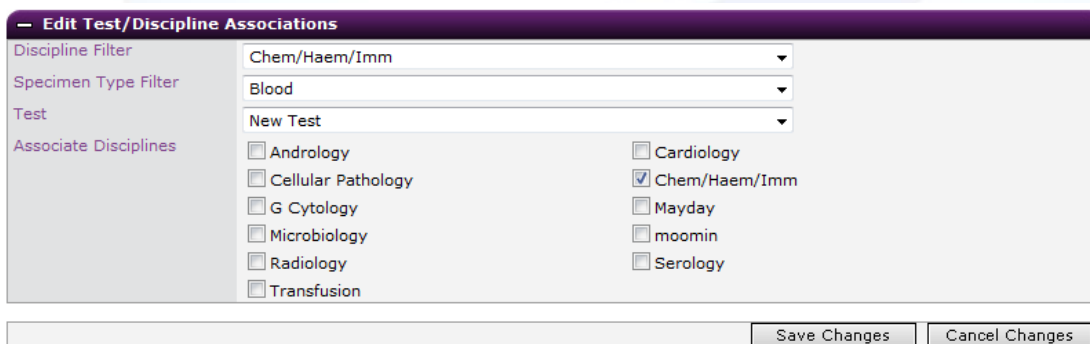


Clicking on a type will either show the sites or tests associated with that type.



Clicking on a test will load it into the Edit Test section. Clicking an expanded node will collapse it. To expand a whole branch, double click the node. Reset will collapse the whole tree.

To amend test/discipline associations expand the 'Edit Test/Discipline Associations' panel and select the test that requires amending.



The number of test in the test drop down can be reduced by filtering by a particular discipline and specimen type. To link it to a new discipline, check the relevant check box. To remove it from a discipline, uncheck the relevant check box.

If 'New Test' was removed from Blood Sciences it would no longer appear for a Blood Sciences request even if it's still associated with a Blood Sciences specimen type. Click 'Save Changes' to save the new associations. Once the test has been associated with a new discipline it will require editing to link it to the required specimen types and sites.

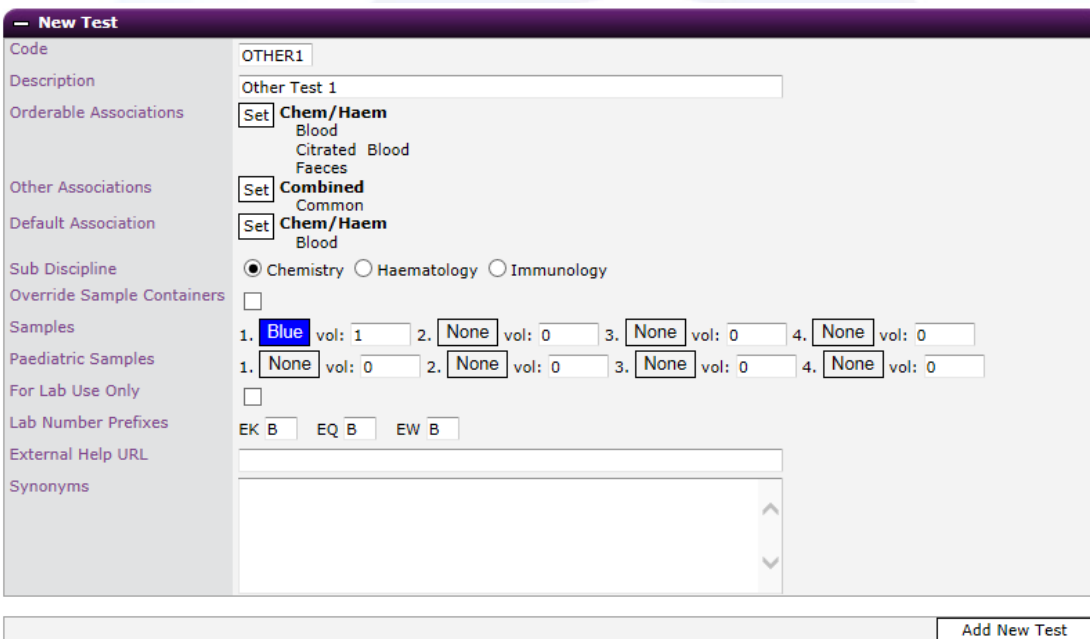
It is possible for a test to become 'Orphaned'. For example a test is linked to a single discipline and that discipline is deleted. Expand the 'Orphaned Tests' panel and select the test from the drop down. Select which discipline to link the test to and click 'Save Associations'. The test can now be edited in the 'Edit Test' panel.



Other Associations in Depth

Other Associations allow a test to appear under discipline/type/site combinations other than those it's supposed to be associated with. This functionality works well for tests commonly ordered at the same time, but span different disciplines, types and/or sites. For example, if you have 3 tests commonly ordered together, but they are associated to three different specimen types they can be configured to appear under a common specimen type. This allows them to be requested all at the same time without manually creating 3 separate requests from the start. At some point in the life of the request, depending on various configurable options, the request will be automatically split into three distinct requests and the correct specimen types assigned ready for submittal.

The behaviour can be illustrate with the following two tests.



— New Test

Code	OTHER2
Description	Other Test 2
Orderable Associations	<input type="checkbox"/> Microbiology Faeces Fluid Aqueous tap/anterior chamber Ascitic fluid Bile Elbow aspirate Gastrostomy fluid Hip aspirate Joint aspirate Knee aspirate Nasogastric aspirate Peritoneal dialysate Pleural fluid Wound swab
Other Associations	<input type="checkbox"/> Combined Common
Default Association	<input type="checkbox"/> Microbiology Fluid Gastrostomy fluid
Override Sample Containers	<input type="checkbox"/>
Samples	1. Feacon vol: 3 2. None vol: 0 3. None vol: 0 4. None vol: 0
Paediatric Samples	1. None vol: 0 2. None vol: 0 3. None vol: 0 4. None vol: 0
For Lab Use Only	<input type="checkbox"/>
Lab Number Prefixes	M <input type="checkbox"/>
External Help URL	<input type="text"/>
Synonyms	<div style="border: 1px solid #ccc; height: 20px;"></div>

Both tests are orderable on different disciplines. However, they have been configured to show under Combined/Common.

Patient Test Request

Specimen Number	Awaiting assignment.	Request Status	Not Saved
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Patient Details

NHS Number <input type="text"/>	<input type="button" value="Auto Fill"/>	Forename <input type="text"/>
Surname <input type="text"/>	Gender <input type="text" value="Select Gender..."/>	
Date of Birth <input type="text" value=""/> /	Domiciliary Request <input type="checkbox"/>	
Address <input type="text" value="Address"/>		

Requestor Details

Requestor Location <input type="text" value="Keyworth Surgery, The Moon"/>	Requestor <input type="text" value="Dr I'Hodqes"/>
--	--

Specimen Details

Discipline <input type="text" value="Combined"/>	Specimen Type <input type="text" value="Common"/>
Patient Category <input type="text" value="NHS"/>	Concise Clinical Details / Keywords <div style="border: 1px solid #ccc; height: 20px;"></div>
Fasting <input type="text" value="No"/>	Coded Clinical Details <input type="button" value="Select"/> None Selected
High Risk <input type="text" value="No"/>	Current Antibiotics <input type="button" value="Select"/> None Selected
Urgency <input type="text" value="Routine"/>	Repeating Request <input type="checkbox"/>
Additional Reports To <input type="button" value="Select"/> None Selected	

Requested Tests

<input type="checkbox"/> Other Test 1	<input checked="" type="checkbox"/> Other Test 2	<input type="button" value="Add Tests"/> <input type="button" value="Find Tests"/> <input type="button" value="Add Test Group"/>
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Via Discipline Management I have configured the Combined discipline to split on Save and to confirm the final discipline/type/site of the tests.

Edit Discipline

Discipline	Combined
Discipline Code	CD
Description	Combined
Default Specimen Type	Common
New Request Discipline	Combined

Not all the options below are implemented by every discipline. For example, Show Antibiotics will have no affect on the Radiology Request screen. The Request Split Options are only for Blood/Micro type disciplines.

Show Specimen Sites	<input type="checkbox"/>
Show High Risk	<input checked="" type="checkbox"/>
Show Coded Clinical Details	<input checked="" type="checkbox"/>
Allow Repeating Requests	<input checked="" type="checkbox"/>
Clinical Details Are Mandatory	<input type="checkbox"/>
Show Previous Antibiotics	<input type="checkbox"/>
Previous Antibiotics Are Mandatory	<input type="checkbox"/>
Show Current Antibiotics	<input checked="" type="checkbox"/>
Current Antibiotics Are Mandatory	<input type="checkbox"/>
Show Proposed Antibiotics	<input type="checkbox"/>
Proposed Antibiotics Are Mandatory	<input type="checkbox"/>
Show Registered GP	<input checked="" type="checkbox"/>
Send Reject Message	<input type="checkbox"/>
Send Cancel Message	<input type="checkbox"/>
Show Fasting	<input checked="" type="checkbox"/>

Request Split Options

FormType	SplitAtSave	NeedTypeConfirm	ByDiscipline	BySpecimenType	BySpecimenSite	BySampleContainers	ByLabNumber	SplitAtPrint	NeedTypeConfirm	ByDiscipline	BySpecimenType	BySpecimenSite	BySampleContainers	ByLabNumber	SplitAtCollection	NeedTypeConfirm	ByDiscipline	BySpecimenType	BySpecimenSite	BySampleContainers	ByLabNumber	SplitAtSubinitial	NeedTypeConfirm	ByDiscipline	BySpecimenType	BySpecimenSite	BySampleContainers	ByLabNumber
FullRequest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Domiciliary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

When saving a new request with both tests selected a popup will appear asking for confirmation as to which association the tests should be moved to.

Patient Test Request

Specimen Number Awaiting assignment. Request Status Not Saved ✖

Patient Details

NHS Number 999 999 9999 Forename DUMMY

Surname DATA Gender Female

Date of Birth 27 / 7 / 1932 Domiciliary Request

Address THE MANSE

Requestor Details

Requestor Location Keyworth Surgery, The Moon Requestor Dr I'Hodges

Specimen Details

Confirm Specimen Types

Please confirm the correct Specimen Types for the following tests.

Other Test 1

Chem/Haem Blood N/A

Other Test 2

Microbiology Fluid Gastrostomy fluid

Discipline

Patient Category

Fasting

High Risk

Urgency Routine

Additional Reports To None Selected

Coded Clinical Details None Selected

Current Antibiotics None Selected

Repeating Request

Requested Tests

Other Test 1 Other Test 2

The associations for each test are preselected to the default association specified via the Test Management screen. If different, the user can change these to the correct association for the sample. If only one orderable association exists for a test the user will not be prompted to confirm for that particular one. Alternatively the prompt can be turned off in the Discipline Management screen. In this case the user is never prompted and all the associations are changed to their default.

Patient Test Request	
Specimen Number	F000008831 <input type="button" value="Add"/>
Request Status	Awaiting Specimen Collection <input type="button" value="Reject"/>

Patient Details			
NHS Number	999 999 9999	Forename	DUMMY
Surname	DATA	Gender	Female
Date of Birth	27/07/1932	Domiciliary Request	<input type="checkbox"/>
Address	THE MANSE		

Requestor Details	
Requestor Location	Keyworth Surgery, The Moon
Requestor	Dr I'Hodges <input type="button" value="v"/>

Specimen Details	
Multiple Requests Generated	
One or more tests were moved to another request. The extra generated requests can be reviewed by going to the Reception or Patient Summary screen.	
<input type="button" value="OK"/>	
Discipline	<input type="button" value="v"/>
Patient Category	<input type="button" value="v"/>
Fasting	<input type="button" value="v"/>
High Risk	<input type="button" value="v"/>
Urgency	Routine <input type="button" value="v"/>
Additional Reports To	<input type="button" value="Select"/> None Selected
Coded Clinical Details	<input type="button" value="Select"/> None Selected
Repeating Request	<input type="checkbox"/>

Requested Tests	
<input type="checkbox"/> Factor V Leiden	<input type="checkbox"/> ANCA
<input type="checkbox"/> Blood Culture	<input type="checkbox"/> Carnitine
<input type="checkbox"/> APTT ratio	<input checked="" type="checkbox"/> Other Test 1
<input type="button" value="Add Tests"/> <input type="button" value="Find Tests"/> <input type="button" value="Add Test Group"/>	

Details saved.

Once confirmed the request is split into two.


Patient Test Request	
Specimen Number	F000008831 <input type="button" value="Add"/>
Request Status	Awaiting Specimen Collection <input type="button" value="Reject"/>

Patient Details			
NHS Number	999 999 9999	Forename	DUMMY
Surname	DATA	Gender	Female
Date of Birth	27/07/1932	Domiciliary Request	<input type="checkbox"/>
Address	THE MANSE		


Requestor Details	
Requestor Location	Keyworth Surgery, The Moon
Requestor	Dr I'Hodges <input type="button" value="v"/>

Specimen Details	
Discipline	Chem/Haem <input type="button" value="v"/>
Patient Category	NHS <input type="button" value="v"/>
Fasting	No <input type="button" value="v"/>
High Risk	No <input type="button" value="v"/>
Urgency	Routine <input type="button" value="v"/>
Additional Reports To	<input type="button" value="Select"/> None Selected
Specimen Type	Blood <input type="button" value="v"/>
Coded Clinical Details / Keywords	<input type="button" value="v"/>
Coded Clinical Details	<input type="button" value="Select"/> None Selected
Repeating Request	<input type="checkbox"/>

Requested Tests	
<input type="checkbox"/> Factor V Leiden	<input type="checkbox"/> ANCA
<input type="checkbox"/> Blood Culture	<input type="checkbox"/> Carnitine
<input type="checkbox"/> APTT ratio	<input checked="" type="checkbox"/> Other Test 1
<input type="button" value="Add Tests"/> <input type="button" value="Find Tests"/> <input type="button" value="Add Test Group"/>	

Patient Test Request			
Specimen Number	F000008830	Request Status	Awaiting Specimen Collection <input type="button" value="Reject"/> 
	<input type="text"/> <input type="button" value="Add"/>		

Patient Details			
NHS Number	999 999 9999	Forename	DUMMY
Surname	DATA	Gender	Female
Date of Birth	27/07/1932	Domiciliary Request	<input type="checkbox"/>
Address	THE MANSE		

Requestor Details	
Requestor Location	Keyworth Surgery, The Moon 
Requestor	Dr I'Hodges <input type="button" value="v"/>

Specimen Details	
Discipline	Microbiology <input type="button" value="v"/>
Patient Category	NHS <input type="button" value="v"/>
Fasting	No <input type="button" value="v"/>
High Risk	No <input type="button" value="v"/>
Urgency	Routine <input type="button" value="v"/>
Additional Reports To	<input type="button" value="Select"/> None Selected
Specimen Type	Fluid <input type="button" value="v"/>
Specimen Site	Gastrostomy fluid <input type="button" value="v"/>
Concise Clinical Details / Keywords	<input type="text"/>
Coded Clinical Details	<input type="button" value="Select"/> None Selected
Current Antibiotics	<input type="button" value="Select"/> None Selected
Repeating Request	<input type="checkbox"/>

Requested Tests
<input checked="" type="checkbox"/> Other Test 2
<input type="button" value="Add Tests"/> <input type="button" value="Find Tests"/> <input type="button" value="Add Test Group"/>

<input type="button" value="Save & Collect"/>	<input type="button" value="Clear Changes"/>	<input type="button" value="Save"/>	<input type="button" value="Save & Print"/>	<input type="button" value="New Request For This Patient"/>
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Via the Discipline Management screen the point at which a request is split and the splitting criteria can be tailored per discipline.

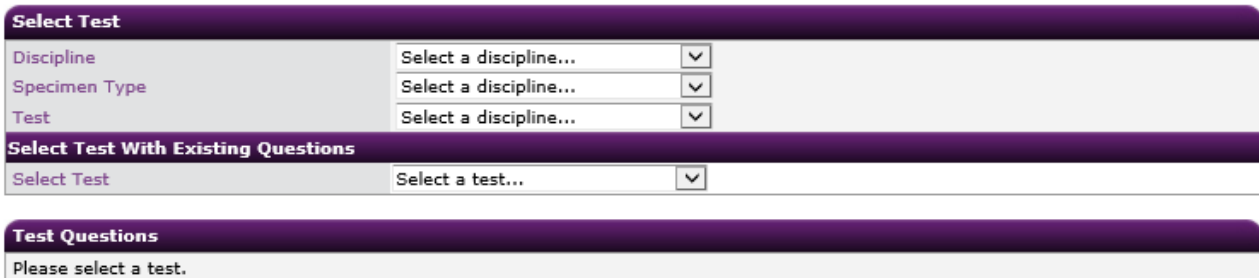
Test Colour Management

For details on configuring the Test Containers sections please consult the 'dartOCM Sample Containers Quick Guide' document.

Test Questions

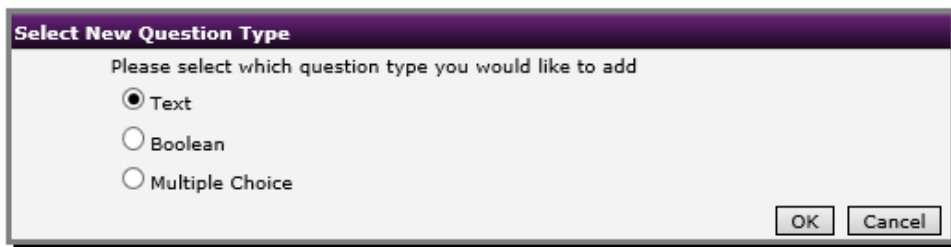
Questions can be added to tests to ensure the request details are correct.

<Configuration><Test Management><Test Questions>



The image shows two stacked dialog boxes. The top one is titled "Select Test" and contains three dropdown menus labeled "Discipline", "Specimen Type", and "Test", each with the text "Select a discipline...". Below this is a section titled "Select Test With Existing Questions" with a single dropdown menu labeled "Select Test" and the text "Select a test...". The bottom dialog box is titled "Test Questions" and contains the text "Please select a test."

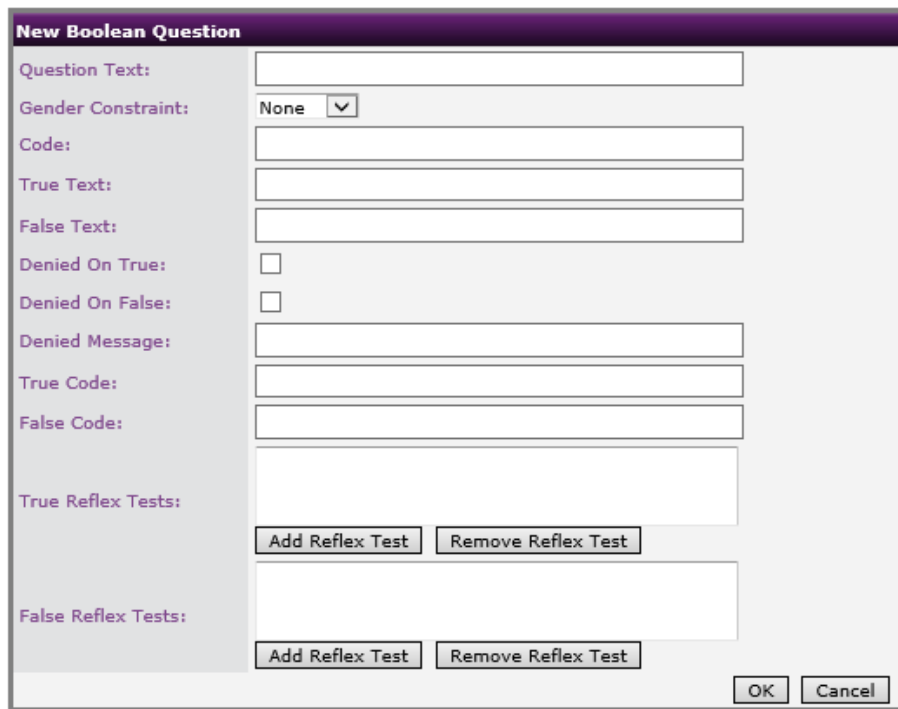
Select the Discipline, Specimen Type and Test and click <Add Question>



The image shows a dialog box titled "Select New Question Type". It contains the text "Please select which question type you would like to add" and three radio button options: "Text" (which is selected), "Boolean", and "Multiple Choice". There are "OK" and "Cancel" buttons at the bottom right.

Select the type of answer required

- Text = free text answer
- Boolean = Yes/No True/False
- Multiple Choice = list selection



The image shows a dialog box titled "New Boolean Question". It contains several input fields and checkboxes:

- Question Text: [text input]
- Gender Constraint: [None] [dropdown]
- Code: [text input]
- True Text: [text input]
- False Text: [text input]
- Denied On True: [checkbox]
- Denied On False: [checkbox]
- Denied Message: [text input]
- True Code: [text input]
- False Code: [text input]
- True Reflex Tests: [text area] with "Add Reflex Test" and "Remove Reflex Test" buttons below it.
- False Reflex Tests: [text area] with "Add Reflex Test" and "Remove Reflex Test" buttons below it.

 There are "OK" and "Cancel" buttons at the bottom right.

Enter

- the question details and required answers
- 'test denied' action on result if required
- complete remaining information as required

Select Test

Discipline	Chem/Haem	▼
Specimen Type	Blood	▼
Test	Anti-VGKC Antibody	▼

Select Test With Existing Questions

Select Test	Select a test...	▼
-------------	------------------	---

Test Questions

Has the patient been abroad? - Boolean Question

True

True Text: Yes

Test Denied On True: False

False

False Text: No

Test Denied On False: False

The question will be displayed along with actions. Add sub questions if required, these would be dependent on answers from the first level question and would be displayed below the appropriate first level answer.

Select Test

Discipline	Chem/Haem	▼
Specimen Type	Blood	▼
Test	Anti-VGKC Antibody	▼

Select Test With Existing Questions

Select Test	Select a test...	▼
-------------	------------------	---

Test Questions

Has the patient been abroad? - Boolean Question

True

True Text: Yes

Test Denied On True: False

Sub question shown on true:

which country did they visit? - Text Question

False

False Text: No

Test Denied On False: False

These questions can be edited and deleted.

Define Sensitive Tests

Tests within the system can be classified as sensitive. A sensitive test has restrictions on who can view the results of the test and see that it has been requested for a patient. The management of sensitive tests is through the "Sensitive Tests" screen.

Define Sensitive Tests

Select Discipline Select discipline... Select Specimen Select discipline first

Selecting a discipline from the drop down will populate the form with tests associated with that discipline.

Define Sensitive Tests

Select Discipline Chem/Haem/Imm Select Specimen Filter tests by specimen type...

Available

TEST 2

▲
▲
▲
▲

Selected

Creatinine
I.N.R.
TEST 1
Test Potassium

The 'Available' list shows tests that are not marked as sensitive tests. The 'Selected' list shows the tests that are currently marked as sensitive tests. Double click a test to move it between lists or highlight and use the arrows. Click 'OK' once finished or 'Reset' to reset the form to the currently configured settings. The tests can be further filtered by specimen type by selecting it from the specimen type drop down.

Define Sensitive Tests

Select Discipline Chem/Haem/Imm Select Specimen Filter tests by specimen type...

Available

TEST 1
TEST 2

▲
▲
▲
▲

Selected

Creatinine
I.N.R.
Test Potassium

Sensitive tests updated successfully.

Below the lists is an expandable panel, which shows the tests currently marked as sensitive.

— Hide Current Sensitive Tests

Chem/Haem/Imm

Blood

- Creatinine
- I.N.R.
- Test Potassium

Microbiology

Urine

- GOCCY
- TEST 4
- TEST 5

Management of users who can see sensitive test results and whether sensitive tests have been requested for a patient is through the user management screen. To allow a user to see sensitive tests check the “View Sensitive Results” check box for the user and click “Add/Update User”.

Location	<input type="text" value="Keyworth Surgery"/>
Requestor	<input type="text" value="Dr I Hodges"/>
Description	<input type="text"/>
View Sensitive Results	<input checked="" type="checkbox"/>
Locked	<input type="checkbox"/>

When a user with “View Sensitive Results” enabled, views results for a patient they will see results for sensitive tests regardless of whether they requested the tests or not. If they view a request for a patient they will see that sensitive tests have been requested for the patient regardless of whether they are the creator of the request.

When a user without “View Sensitive Results” enabled, views results for a patient they will see results for sensitive tests only if they are the original requestor of the tests. If they view a request for a patient they will see that sensitive tests have been requested for the patient only if they are the original requestor of the tests.

Rules Management

Test Warnings

<Configuration><Rules Management><Test Warnings>

The system can be configured to warn requestors when they are about to order a test that has already been requested recently. When a user orders a test that has been ordered previously within the specified time limit they are prompted to confirm if they want to continue or not.

Repeat Test Warning

The following tests have been recently requested for this patient:

Test 17 Alpha Hydroxy progesterone requested on 10/01/2014 09:29:44 [View Results](#)
 Test 17 Alpha Hydroxy progesterone requested on 10/01/2014 09:50:22 Specimen Collected

Click 'Remove' to remove the repeat tests from the current request and continue.
 Click 'OK' to continue with the currently selected tests.
 Click 'Cancel' to amend the currently selected tests.

Note: If a request has results available you can see the results by clicking 'View Results'. You can return to this unsaved request by clicking 'Finish Request' on the left hand menu.

It provides a list of the previous requests, when they were created and the order status. If any of the requests are in status Results Available, clicking 'View Results' will take the user to the results for that order.

New Test Warning

To add a new test warning, select the discipline the test is associated with. From this point the 'Test' drop down will be populated and the test can be selected. To help find the test, select the specimen type the test is associated with. The 'Test' drop down will now only contain tests within that specimen type. Enter the duration for the warning in the 'duration' field and click 'Add Warning' to add it to the system.

New Test Warning

Discipline: Microbiology

Specimen Type Filter: Serum

Test: Adenovirus CFT

Duration (days): 10

Delete Test Warning

Test: Select existing warning...

When a requestor orders an adenovirus CFT test for a patient within 10 days of a previous adenovirus CFT order for the same patient the requestor will now be warned. They can still save the request if they want to.

Delete Test Warning

To delete a test warning, select the warning from the drop down list and click 'Delete Warning'.

New Test Warning

Discipline: Microbiology

Specimen Type Filter: Serum

Test: Adenovirus CFT

Duration (days): 10

Delete Test Warning

Test: Adenovirus CFT 10 days

Linked Tests

Tests can be linked to one or more tests within the same specimen type. When the test is selected in the request screen all the tests linked to it are automatically added to the form.

New Linked Test

To link a test to one or more tests, select the discipline the test is associated with. The number of tests in the 'Test' drop down list can be further filtered by selecting the specimen type the test is associated with.

New Linked Test	
Discipline	Microbiology
Specimen Type Filter	Serum
Test	Select Test...
Edit Linked Test	
Select Existing Test	Adenovirus CFT
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	

Find and select the test in the 'Test' drop down list. As soon as the test is selected a popup will be shown, allowing the selection of tests to link to the select test.

Select tests for linking to Adenovirus CFT	
Available	Selected
17 Alpha Hydroxy progesterone 17 Beta Oestradiol 24 Hour Urine Bence-Jones Prot 24 Hour Urine Calcium 24 Hour Urine Catecholamines 24 Hour Urine Citrate 24 Hour Urine Copper 24 Hour Urine Cortisol 24 Hour Urine Creat Clearance 24 Hour Urine Electrolytes 24 Hour Urine Hydroxyindoles 24 Hour Urine Magnesium 24 Hour Urine Oxalate 24 Hour Urine Phosphate 24 Hour Urine Protein 24 Hour Urine Uric acid 24 hour line int var Tobd 24 hour line int var Tobd 36 hour line int var Tob 36 hour line int var Tob	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

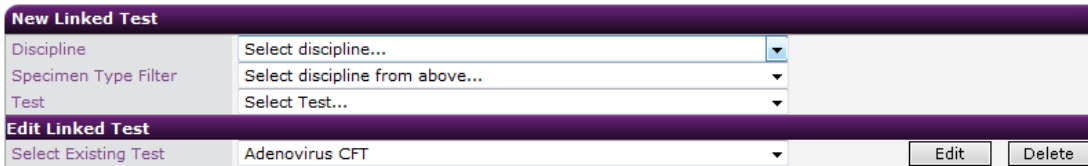
To select tests use the arrows to move them into the 'Selected' list or double click a test to move between lists.

Select tests for linking to Adenovirus CFT	
Available	Selected
17 Alpha Hydroxy progesterone 17 Beta Oestradiol 24 hour line int var Tobd 24 hour line int var Tobd 24 Hour Urine Bence-Jones Prot 24 Hour Urine Calcium 24 Hour Urine Catecholamines 24 Hour Urine Citrate 24 Hour Urine Copper 24 Hour Urine Cortisol 24 Hour Urine Creat Clearance 24 Hour Urine Electrolytes 24 Hour Urine Hydroxyindoles 24 Hour Urine Magnesium 24 Hour Urine Oxalate 24 Hour Urine Phosphate 24 Hour Urine Protein 24 Hour Urine Uric acid 36 hour line int var Tob 36 hour line int var Tob	Adjusted Calcium Adrenal Antibodies Aero-Allergens Panel 1 Aldosterone
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

To save the links to the system click 'OK'. When a requestor selects Adenovirus CFT on the request screen the four linked tests will automatically be added.

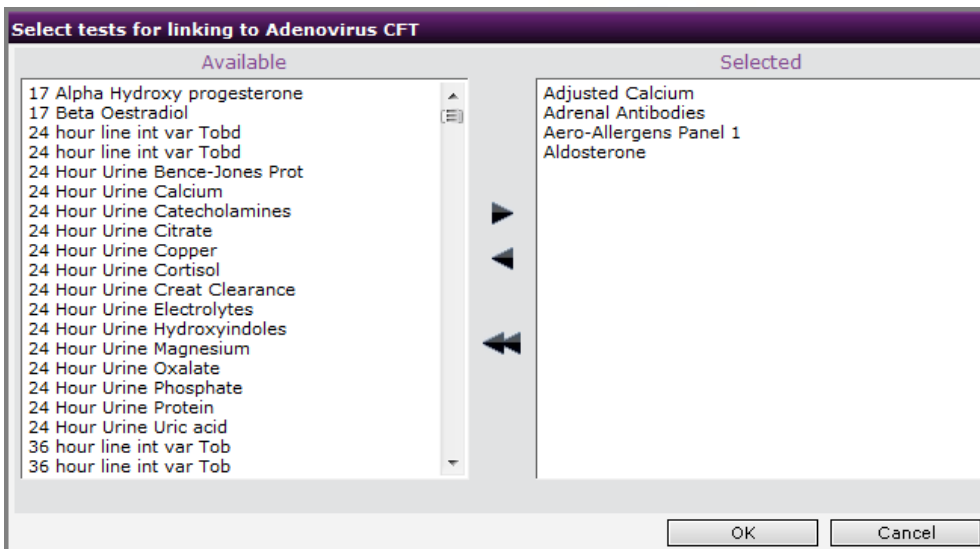
Edit Linked Test

To edit an existing linked test, select it from the 'Select Existing Test' drop down.



The image shows two overlapping forms. The top form is titled 'New Linked Test' and has three dropdown menus: 'Discipline' (with 'Select discipline...' as the selected option), 'Specimen Type Filter' (with 'Select discipline from above...' as the selected option), and 'Test' (with 'Select Test...' as the selected option). The bottom form is titled 'Edit Linked Test' and has a 'Select Existing Test' dropdown menu with 'Adenovirus CFT' selected. To the right of this dropdown are 'Edit' and 'Delete' buttons.

Clicking 'Edit' will launch the popup as before.



The image shows a dialog box titled 'Select tests for linking to Adenovirus CFT'. It is divided into two panes: 'Available' on the left and 'Selected' on the right. The 'Available' pane contains a list of tests including '17 Alpha Hydroxy progesterone', '17 Beta Oestradiol', '24 hour line int var Tobd', '24 hour line int var Tobd', '24 Hour Urine Bence-Jones Prot', '24 Hour Urine Calcium', '24 Hour Urine Catecholamines', '24 Hour Urine Citrate', '24 Hour Urine Copper', '24 Hour Urine Cortisol', '24 Hour Urine Creat Clearance', '24 Hour Urine Electrolytes', '24 Hour Urine Hydroxyindoles', '24 Hour Urine Magnesium', '24 Hour Urine Oxalate', '24 Hour Urine Phosphate', '24 Hour Urine Protein', '24 Hour Urine Uric acid', '36 hour line int var Tob', and '36 hour line int var Tob'. The 'Selected' pane contains a list of tests including 'Adjusted Calcium', 'Adrenal Antibodies', 'Aero-Allergens Panel 1', and 'Aldosterone'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

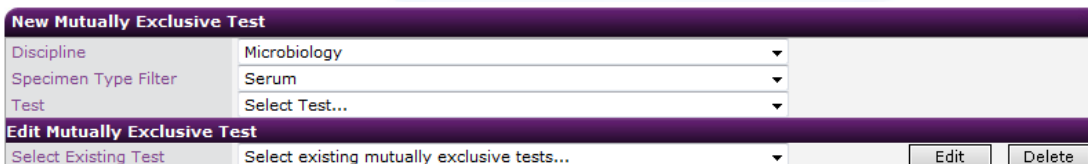
Amend the tests to link to the selected test and click 'OK' to save the changes to the system. To delete an existing linked test, select it from the 'Select Existing Test' drop down and click 'Delete'.

Mutually Exclusive Tests

If there are tests that should not be order at the same time, they can be setup as mutually exclusive tests. A test can be linked to one or more tests within the same specimen type. When the test is selected in a request along with one of the associated mutually exclusive tests, the request cannot be submitted until one of the tests has been removed.

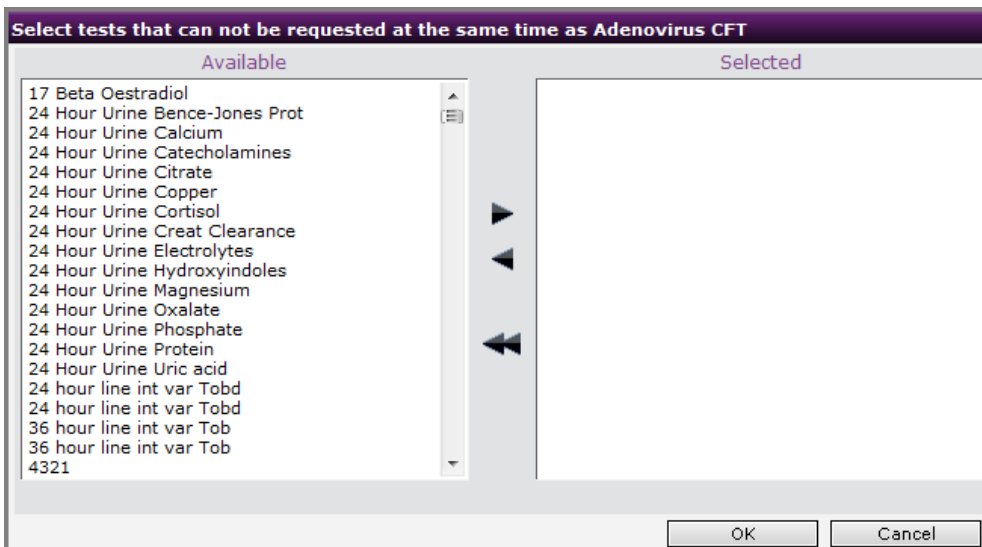
New Mutually Exclusive Test

To associate a test to one or more mutually exclusive tests, select the discipline the test is associated with. The number of tests in the 'Test' drop down list can be further filtered by selecting the specimen type the test is associated with.

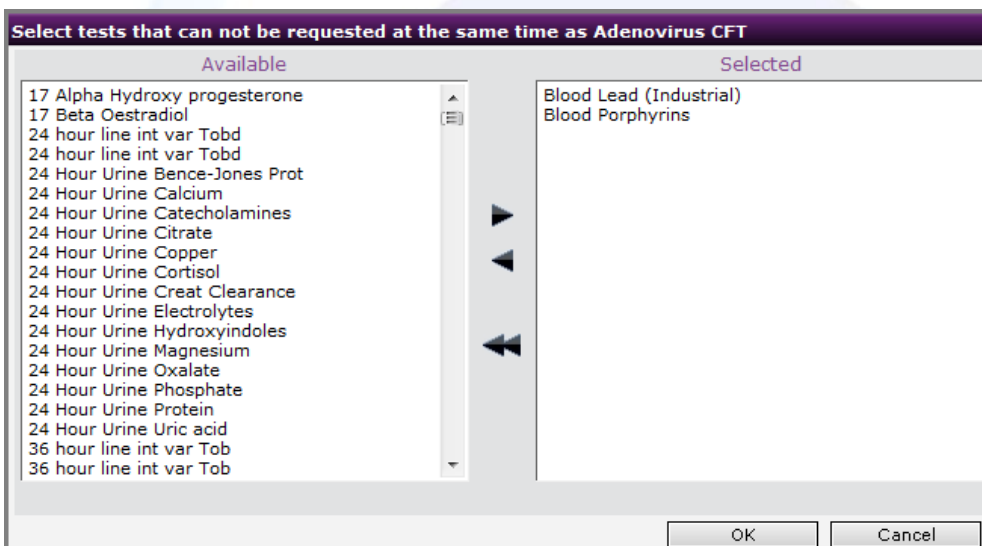


The image shows two overlapping forms. The top form is titled 'New Mutually Exclusive Test' and has three dropdown menus: 'Discipline' (with 'Microbiology' as the selected option), 'Specimen Type Filter' (with 'Serum' as the selected option), and 'Test' (with 'Select Test...' as the selected option). The bottom form is titled 'Edit Mutually Exclusive Test' and has a 'Select Existing Test' dropdown menu with 'Select existing mutually exclusive tests...' selected. To the right of this dropdown are 'Edit' and 'Delete' buttons.

Find and select the test in the 'Test' drop down list. As soon as the test is selected a popup will be shown, allowing the selection of tests to link to the select test.



To select tests use the arrows to move them into the 'Selected' list or double click a test to move between lists.



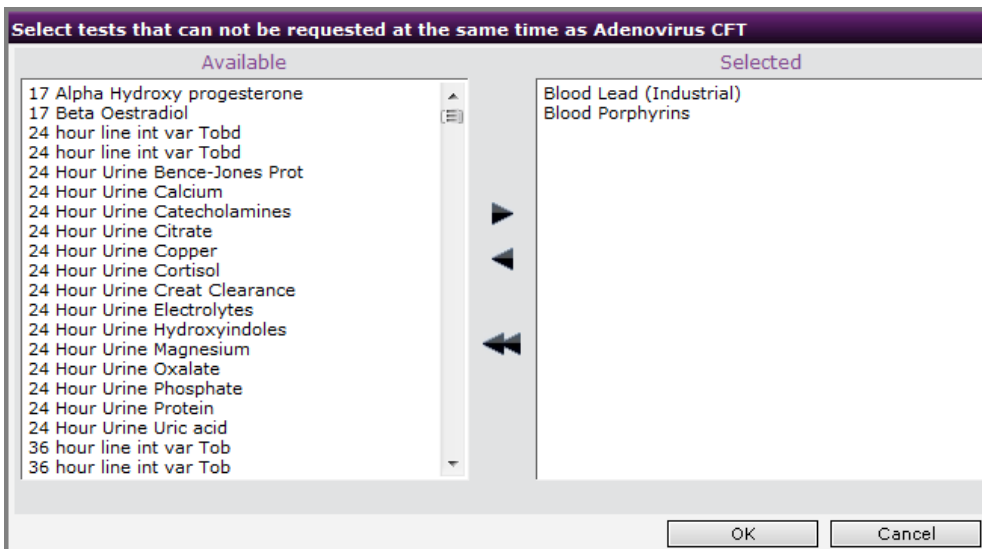
Click 'OK' to save the mutually exclusive associations to the system. When a requestor selects Adenovirus CFT and Blood Porphyrins on the same request, they will be warned that the request cannot be saved and they will need to remove one of the tests.

Edit Mutually Exclusive Test

To edit existing mutually exclusive tests, select it from the 'Select Existing Test' drop down.



Clicking 'Edit' will launch the popup as before.



Amend the tests that cannot be ordered at the same time and click 'OK' to save the changes to the system. To delete the existing mutually exclusive test, select it from the 'Select Existing Test' drop down and click 'Delete'.

Test Guidance

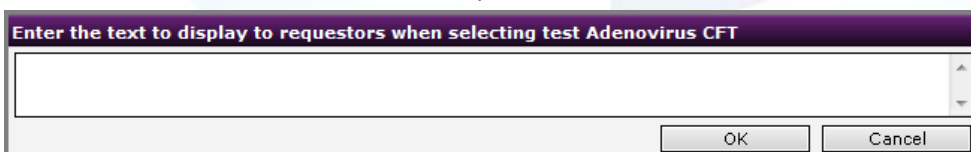
A prompt can be assigned to a test, which is presented to the user when they select a test within the request screen.

New Test Guidance

To add guidance to a test, select the discipline the test is associated with. The number of tests in the 'Test' drop down list can be further filtered by selecting the specimen type the test is associated with.



Find and select the test in the 'Test' drop down list. As soon as the test is selected a popup will be shown.



Type the text to display to the requestor when they select the test in the request screen and click 'OK' to save it to the system. A link can be included to an external site. It should follow the standard HTML anchor tag format: `Click Here`.

Edit Test Guidance

To edit an existing test guidance, select it from the 'Select Existing Test' drop down.

New Test Guidance	
Discipline	Select discipline... ▼
Specimen Type Filter	Select discipline from above... ▼
Test	Select Test... ▼
Edit Test Guidance	
Select Existing Test	Adenovirus CFT ▼
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	

Clicking 'Edit' will launch the popup as before.

Enter the text to display to requestors when selecting test Adenovirus CFT	
<div style="border: 1px solid gray; padding: 5px; min-height: 20px;"> This test is very expensive. </div>	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

Amend the guidance text and click 'OK' to save the changes to the system. To delete an existing test guidance, select it from the 'Select Existing Test' drop down and click 'Delete'.

Test Gender Constraint

A test can be linked to a specific gender and will not be orderable for patients of a different gender.

New Test Gender Constraint

To add a gender constraint to a test, select the discipline the test is associated with. The number of tests in the 'Test' drop down list can be further filtered by selecting the specimen type the test is associated with.

New Test Gender Constraint	
Discipline	Microbiology ▼
Specimen Type Filter	Serum ▼
Test	Select Test... ▼
Edit Test Gender Constraint	
Select Existing Test	Select existing test gender constraint... ▼
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	

Find and select the test in the 'Test' drop down list. As soon as the test is selected a popup will be shown.

Select which gender applies for test Adenovirus CFT	
<input checked="" type="radio"/> Male <input type="radio"/> Female	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

Choose which gender the test is for, and click 'OK' to save it to the system.

Edit Test Gender Constraint

To edit an existing gender constraint, select it from the 'Select Existing Test' drop down.

New Test Gender Constraint	
Discipline	Select discipline... ▼
Specimen Type Filter	Select discipline from above... ▼
Test	Select Test... ▼
Edit Test Gender Constraint	
Select Existing Test	Adenovirus CFT ▼
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	

Clicking 'Edit' will launch the popup as before.

Select which gender applies for test Adenovirus CFT	
<input checked="" type="radio"/> Male <input type="radio"/> Female	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

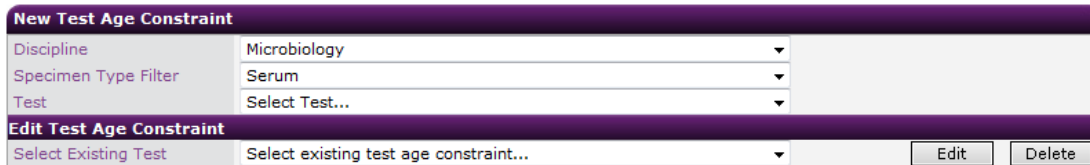
Amend the gender constraint and click 'OK' to save the changes to the system. To delete an existing gender constraint, select it from the 'Select Existing Test' drop down and click 'Delete'.

Test Age Constraint

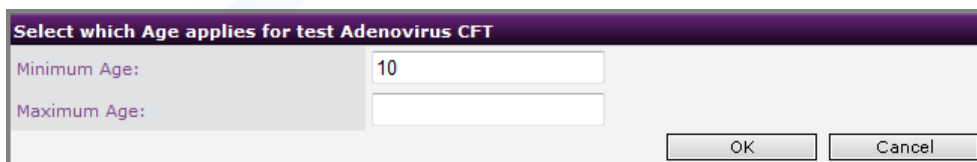
A test can be linked to a specific age range and will not be orderable for patients whose age is not within this range.

New Test Age Constraint

To add an age constraint to a test, select the discipline the test is associated with. The number of tests in the 'Test' drop down list can be further filtered by selecting the specimen type the test is associated with.



Find and select the test in the 'Test' drop down list. As soon as the test is selected a popup will be shown.



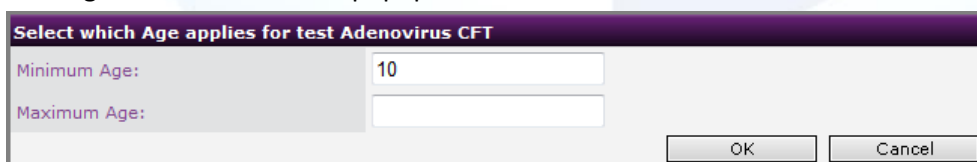
Within the popup complete minimum, maximum or both fields. For example if only minimum is set to 10 then the test will not be orderable for patients under 10 years old. If only maximum is set to 60 then the test will not be orderable for patients over 60 years old. If minimum is set to 10 and maximum set to 60 then the test will only be orderable for patients between 10 and 60 years old.

Edit Test Age Constraint

To edit an existing age constraint, select it from the 'Select Existing Test' drop down.



Clicking 'Edit' will launch the popup as before.



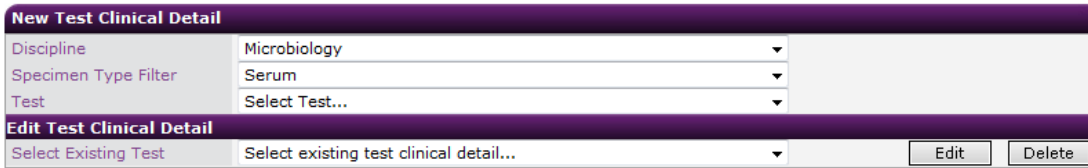
Amend the age constraint and click 'OK' to save the changes to the system. To delete an existing age constraint, select it from the 'Select Existing Test' drop down and click 'Delete'.

Test Triggered Clinical Detail

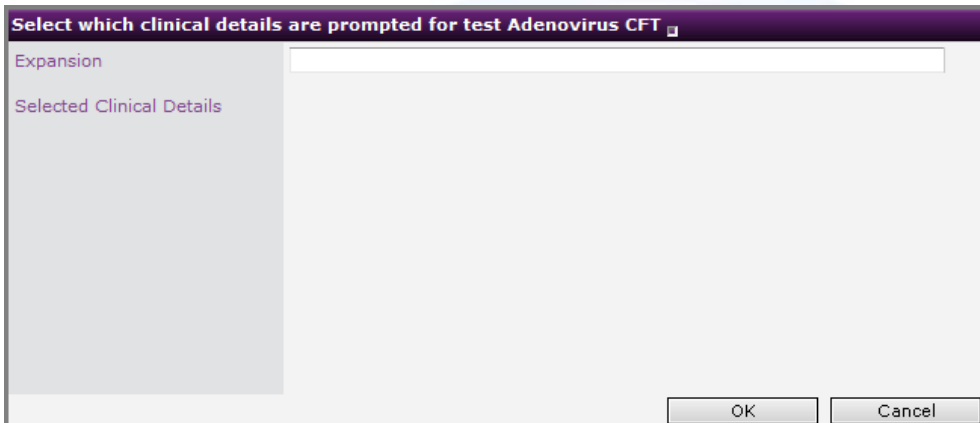
A test can be configured to prompt for a clinical detail. One must be selected from a list and it is then added to the list of manually added coded clinical details. This rule can also be used to prompt the user if it is a fasting or non-fasting request.

New Test Triggered Clinical Detail

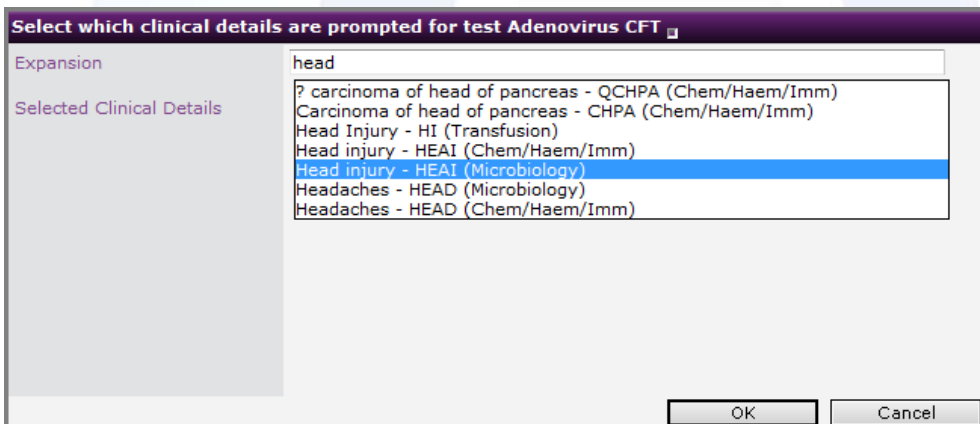
To add a list of clinical details to a test, select the discipline the test is associated with. The number of tests in the 'Test' drop down list can be further filtered by selecting the specimen type the test is associated with.



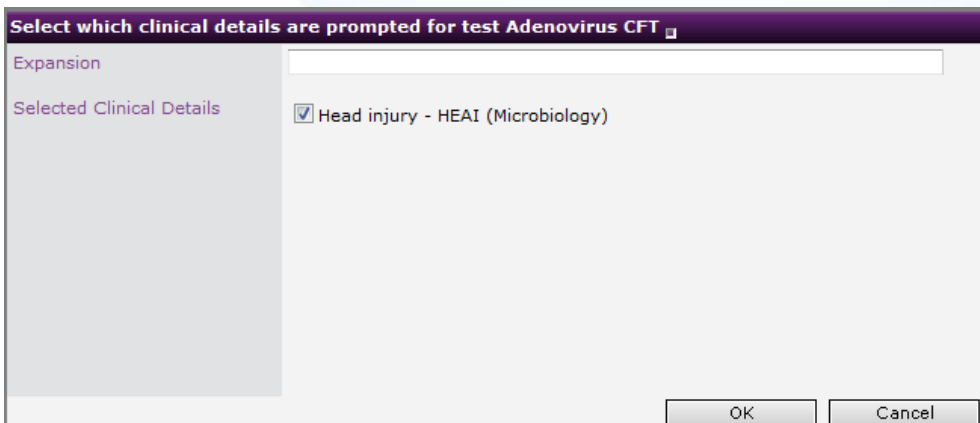
Find and select the test in the 'Test' drop down list. As soon as the test is selected a popup will be shown.



Begin typing the clinical details expansion into the text box. It will present a list of matching clinical details.

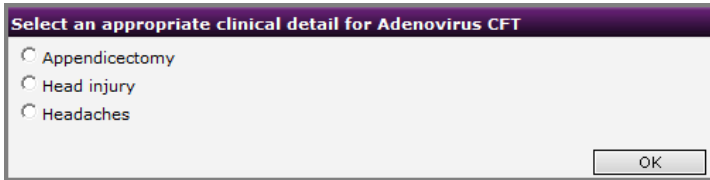


Selecting one will add it to the test.

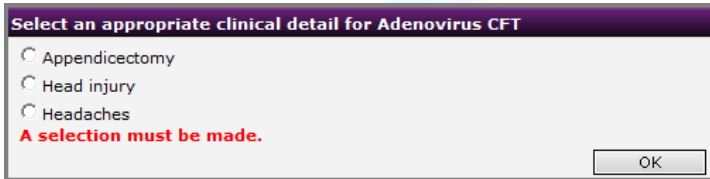


Continue the process until all the desired clinical details have been added. Click okay to save the new rule or click cancel to discard changes.

When Adjusted Calcium is selected while making a request, a popup will now appear asking the user to make a choice.



The user must choose one.



When one is chosen and 'OK' clicked, the selected clinical detail is saved along with any other manually added coded clinical details.

A 'Not Applicable' coded clinical detail can be added to the system. This can be added as a final option in case none of the clinical details presented are appropriate. The code for this clinical detail can be removed from the request message to the lab system.

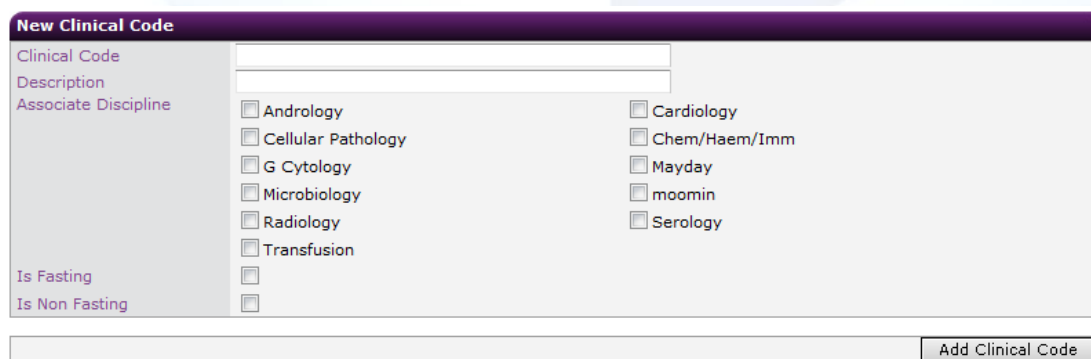
Edit Test Triggered Clinical Detail

To edit an existing rule, just select the test in the drop down in the Edit Test Clinical Detail section. Click 'Edit' and the same popup will appear. To remove a test, just uncheck its checkbox. To add a test, search and select it using the expansion textbox.

To delete an existing rule, just select the test in the drop down. Click 'Delete' and the rule will be removed from the system.

Fasting Test Triggered Clinical Detail

The clinical detail management section has two properties – 'Is Fasting' and 'Is Non Fasting'.



The Fasting clinical detail should be specified as Is Fasting. And The Non Fasting clinical detail should be specified as Is Non Fasting.

Edit Clinical Code

Discipline Filter	Chem/Haem/Imm	
Description	Fasting Specimen	Select
Clinical Code	FAST	
Is Fasting	<input checked="" type="checkbox"/>	
Is Non Fasting	<input type="checkbox"/>	

Selected clinical detail: Fasting Specimen Update Clinical Code Delete Clinical Code

Edit Clinical Code

Discipline Filter	Chem/Haem/Imm	
Description	Non Fasting	Select
Clinical Code	NF	
Is Fasting	<input type="checkbox"/>	
Is Non Fasting	<input checked="" type="checkbox"/>	

Selected clinical detail: Non Fasting Update Clinical Code Delete Clinical Code

The two new properties are used to select 'Yes' or 'No' in the fasting drop down list on the request form. When creating a fasting test triggered clinical detail, only clinical details specified as 'Is Fasting' or 'Is Non Fasting' should be used.

Select which clinical details are prompted for test Glucose (Serum)

Expansion

Selected Clinical Details

- Fasting Specimen - FAST (Chem/Haem/Imm)
- Non Fasting - NF (Chem/Haem/Imm)

OK Cancel

When Glucose (Serum) is selected while making a request, a popup will now appear asking the user to make a choice.

Specimen Details

Discipline	Chem/Haem/Imm	Specimen Type	Blood
Private Treatment	<input type="checkbox"/>		
Fasting	No		
Innoculation Risk	Unknown		
Urgency	Routine		
Additional Reports To	Select	None Selected	Repeating Request <input type="checkbox"/>

Select an appropriate clinical detail for Glucose (Serum)

- Fasting Specimen
- Non Fasting

OK

If the clinical detail specified as Is Fasting in clinical details management is selected, the fasting drop down changes to 'Yes' if not already selected.

Specimen Details

Discipline	Chem/Haem/Imm	Specimen Type	Blood
Private Treatment	<input type="checkbox"/>		
Fasting	Yes		
Innoculation Risk	Unknown		
Urgency	Routine		
Additional Reports To	Select	None Selected	Repeating Request <input type="checkbox"/>

Select an appropriate clinical detail for Glucose (Serum)

- Fasting Specimen
- Non Fasting

OK

Alternatively, if the clinical detail specified as Is Non Fasting in clinical details management is selected, the fasting drop down changes to 'No' if not already selected.

Once one 'Fasting' prompt has been answered, any other tests selected with the same fasting options will not trigger the prompt again. Also if the fasting drop down has already been set to 'Yes' prior to any fasting prompts been shown, no fasting prompts will be presented to the user (it is assumed that if the user has changed the fasting to 'Yes' then it is a fasting request).

If Non Fasting has been chosen, the code NF will not be included in the coded clinical details field sent to the lab system.



Antibiotic Therapies Management

New Antibiotic Therapy

To add a new antibiotic therapy to the system, enter its code and description into the relevant fields and click 'Add Antibiotic Therapy'. The new therapy will now be available for users to select when making a request.

New Antibiotic Therapy	
Antibiotic Therapy Code	NAT
Description	New Antibiotic Therapy

Edit Antibiotic Therapy

To edit an existing therapy, start typing its description in the 'Description' field. A drop down will appear as you type showing valid therapies based on the text typed. Click on the required name from the drop down and then click 'Select'.

Edit Antibiotic Therapy		
Description	New Antibiotic Therapy	Select
Antibiotic Therapy Code	NAT	

Selected therapy: New Antibiotic Therapy [Update Antibiotic Therapy](#) [Delete Antibiotic Therapy](#)

Amend the description and/or code and click 'Update Antibiotic Therapy' to save the changes to the system. The description and code must be unique to the system. To delete the selected therapy click 'Delete Antibiotic Therapy'.

Coded Clinical Details Management

New Coded Clinical Detail

To add a new coded clinical detail to the system enter its code and description into the relevant fields and select which disciplines it will be associated with. Click 'Add Clinical Code' to add it to the system. The new clinical code will now be available for users to select when making a request.

New Clinical Code	
Clinical Code	NCC
Description	New Clinical Code
Associate Discipline	<input type="checkbox"/> Andrology <input type="checkbox"/> Cellular Pathology <input type="checkbox"/> G Cytology <input checked="" type="checkbox"/> Microbiology <input type="checkbox"/> Radiology <input type="checkbox"/> Transfusion <input type="checkbox"/> Cardiology <input checked="" type="checkbox"/> Chem/Haem/Imm <input type="checkbox"/> Mayday <input type="checkbox"/> moomin <input type="checkbox"/> Serology
Is Fasting	<input type="checkbox"/>
Is Non Fasting	<input type="checkbox"/>
<input type="button" value="Add Clinical Code"/>	

The new clinical code created above will only be selectable when the user creates a Chem/Haem/Imm or Microbiology request.

The two properties 'Is Fasting' and 'Is Non Fasting' are used for the test triggered clinical details (see above). They are used to tell the system that the particular clinical detail indicates the patient was either fasting or not fasting.

Edit Coded Clinical Detail

To edit an existing clinical code select one of the disciplines the clinical code is associated with. Start typing its description in the 'Description' field. A drop down will appear as you type showing valid clinical codes based on the text typed. Click on the required name from the drop down and then click 'Select'.

Edit Clinical Code	
Discipline Filter	Chem/Haem/Imm
Description	New Clinical Code <input type="button" value="Select"/>
Clinical Code	NCC
Is Fasting	<input type="checkbox"/>
Is Non Fasting	<input type="checkbox"/>
Selected clinical detail: New Clinical Code <input type="button" value="Update Clinical Code"/> <input type="button" value="Delete Clinical Code"/>	

Amend the description and/or code and click 'Update Clinical Code' to save the changes to the system. The description and code must be unique to the system. To delete the clinical code click 'Delete Clinical Code'.

Patient Categories Management

Patient Categories Overview

Patient categories are specified per discipline. They are displayed on the relevant request screen via a drop down list. A location can be configured to have a default patient category per discipline (see the Location Management section).

Edit Categories	
Discipline	Chem/Haem
Categories	NHS (NHS) ↕ ✖
	Private (CATII) ↕ ✖
	<input type="text"/> (<input type="text"/>) <input type="button" value="Add"/>

Edit Patient Categories

To add a new category enter the expansion and code in the two fields.

Edit Categories	
Discipline	Chem/Haem
Categories	NHS (NHS) ↕ ✖
	Private (CATII) ↕ ✖
	Blood <input type="text"/> (B <input type="text"/>) <input type="button" value="Add"/>

Click 'Add'.

Edit Categories	
Discipline	Chem/Haem
Categories	NHS (NHS) ↕ ✖
	Private (CATII) ↕ ✖
	Blood (B) ↕ ✖
	Blood <input type="text"/> (B <input type="text"/>) <input type="button" value="Add"/>

The order that they appear in the list is the order that they appear in the drop down on the request form. To change the order in which they appear in the list hold the ↕ icon and drag to the desired position.

Edit Categories	
Discipline	Chem/Haem
Categories	NHS (NHS) ↕ ✖
	Blood (B) ↕ ✖
	Private (CATII) ↕ ✖
	<input type="text"/> (<input type="text"/>) <input type="button" value="Add"/>

Order updated.

To remove a category click the red cross at the end of the category to be deleted.

Edit Categories	
Discipline	Chem/Haem
Categories	NHS (NHS) ↕ ✖
	Private (CATII) ↕ ✖
	<input type="text"/> (<input type="text"/>) <input type="button" value="Add"/>

LIMS Reports

LIMS Reports Overview

The Laboratory Information Management System (LIMS) Reports screen allows administrators to monitor the requests that have been successfully submitted, errored during submittal or in a pending status. It is accessed via the right hand main menu. The actual title of the menu item will vary depending on the lab system used e.g. “Apex Reports” or “TelePath Reports”.

Unsuccessful Requests

The default view when entering the screen is unsuccessful requests.

Apex Reports - Unsuccessful Requests					
Specimen Prefix: All		Unsuccessful		Successful	Pending
Delete Selected Requests					
Request Date	Lab Number	NHS Number	Last Error		
<input type="checkbox"/> 15/11/2010 13:48	E,10.0000191.C	999 999 9999	Registration Failed in HCL! You have smelly feet!		
<input type="checkbox"/> 12/11/2010 11:17	E,S951753	888 888 8888	Registration Failed in HCL You have smelly feet!		
<input type="checkbox"/> 11/06/2010 08:52	EW2000192	999 999 9999	No error returned		

The requests can be filtered by prefix by changing the drop down Specimen Prefix. The error return by the LIMS is displayed in the Error Description field. Clicking on the row will take the user to the main request screen where they can amend the request and resubmit.

To remove a request from the view, tick the relevant check boxes and click Delete Selected Requests. Note: the requests are not actually deleted from the system.

Successful Requests

To view successfully submitted requests click the Successful radio button. This view is for information only. Once successfully submitted a request can't be changed. Clicking on a row will show the request in the main request screen.

Apex Reports - Successful Requests				
Specimen Prefix: All		Unsuccessful	Successful	Pending
Request Date	Lab Number	NHS Number		
20/04/2011 15:09	EW200131F	999 999 9999		

Pending Requests

In the pending request view will be requests in various statuses.

Apex Reports - Pending Requests					
Specimen Prefix: All		Unsuccessful		Successful	Pending
Refresh Resubmit Selected Requests Delete Selected Requests					
1 2 17 requests over 2 pages.					
Request Date	Lab Number	NHS Number	Status	Pending Time	
<input type="checkbox"/> 20/04/2011 15:25	EW200134M	888 888 8888	Submit to LIMS	30 minutes	
<input type="checkbox"/> 20/04/2011 15:15	EW200133K	888 888 8888	Submit to LIMS	37 minutes	
<input type="checkbox"/> 24/08/2009 09:40	M MI 0000191	111 111 1111	Submit to LIMS	43 days and 4 hours	

A request can be submitted once it has reached the “Request Submitted By Doctor” or “Specimen Collected” status. The submittal steps and associated statuses are detailed below.

File based interface:

Request submitted via the Quick Submit screen. Status changed to “Submit to LIMS”. At this point the request has only been modified in the database to say that it can be submitted.

Plumtree service processes requests in status “Submit to LIMS”. The service generates the order file and places it in the pickup folder. Once the file is placed the request status is changed to “Submitted”.

The LIMS processes the file and places a response file in the pickup folder. No status change is recorded in dartOCM.

Plumtree service processes the LIMS response file. The requests status is changed to “Order Accepted” or “Error in order” depending on the content of the response file.

TCP/IP based interface:

Request submitted via the Quick Submit screen. Status changed to “Submit to LIMS”. At this point the request has only been modified in the database to say that it can be submitted.

Plumtree service processes requests in status “Submit to LIMS”. The service generates a network message and sends it straight to the LIMS interface connection. Once the data is passed over the request status is changed to “Submitted”.

When the LIMS has received the data it responds with an acknowledgement message. The request status is changed to “Acknowledgement Received”. At this point the LIMS has the data, but has not processed it yet.

The LIMS processes the data and sends a network message directly to the Plumtree service. The requests status is changed to “Order Accepted” or “Error in order” depending on the content of the message.

If a request is stuck in a status due to a failure at some point, it can be resubmitted by tick the relevant check boxes and clicking Resubmit Selected Requests. This will reset the status to “Submit to LIMS”.

To remove a request from the view, tick the relevant check boxes and click Delete Selected Requests. Note: the requests are not actually deleted from the system.

Domiciliary Laboratory Printing

Overview

Configured locations can make domiciliary requests via dartOCM. Unlike a normal request the requestor does not print the request form, but simply saves the request. The laboratory staff print the request form via the Domiciliary Lab Printing screen.

Details

The Domiciliary Lab Printing screen is accessed via the right hand menu. Standard Reports -> Domiciliary Lab Printing.

Domiciliary Request Printing						
<input type="checkbox"/>	Patient	GP Practice	Status	Date Required	Printed	View
<input type="checkbox"/>	DATA, DUMMY 999 999 9999 F URGENT *CANCELLED*	Keyworth Surgery	Cancelled	10/06/2010		
<input type="checkbox"/>	DATA1, DUMMY 111 111 1111 M *CANCELLED*	Keyworth Surgery	Cancelled	10/06/2010		
<input type="checkbox"/>	DATA, DUMMY 999 999 9999 F *CANCELLED*	Keyworth Surgery	Cancelled	24/06/2010		
<input type="checkbox"/>	DATA, DUMMY 999 999 9999 F *CANCELLED*	Keyworth Surgery	Cancelled	03/07/2010		
<input type="checkbox"/>	DATA, DUMMY 999 999 9999 F *CANCELLED*	Keyworth Surgery	Cancelled	03/07/2010		
<input type="checkbox"/>	DATA1, DUMMY 111 111 1111 M	Keyworth Surgery	Submitted By Doctor	10/06/2010	✓	
<input type="checkbox"/>	DATA, DUMMY 999 999 9999 F	Keyworth Surgery	Submitted By Doctor	02/09/2010		
<input type="checkbox"/>	DATA, DUMMY 999 999 9999 F	Keyworth Surgery	Submitted By Doctor	10/09/2010		

Show Printed
 Show Non Printed

This screen can be set as a home page so users can be sent to this screen as soon as they log in.

Requests are ordered by urgency and then by Date Required. Requests can be selected individually via the check box to the left or all requests on the current page can be selected or de-selected via the checkbox on the left of the table header.



You can only work with the requests on the current page. If you select requests on one page, change to another page, select more requests, clicking an action button will only action the selected requests on the current page, not the selected requests on the previous page.

To print requests, select them and click 'Print'. A new screen will open and the request forms loaded.

Print Request -- Webpage Dialog

Request 1 of 3







Pathlinks Pathology Request Form **URGENT**
 For: Chem/Haem/Imm Printed: 20/04/2011 16:05
 From: Dr J Glendon at Keyworth Surgery 0115 971 6661

<p>NHS Number</p> <p style="text-align: center;">  999 999 9999 </p> <p> DATA DUMMY 27/07/1932, Female </p>	<p>Specimen Details</p> <p style="text-align: center;">  10.0000080.L </p> <p> Faeces Collected: </p>
<p>Patient Address</p> <p>THE MANSE, 14 GREENACRE DRIVE, HILLINGTON, GLASGOW, G51 2HK.</p>	
<p>Requested Tests</p> <p>Culture for yeasts</p>	
<p>Clinical Details</p>	
<p>Date and Time of Receipt by Lab:</p> <p style="text-align: center;">d97b5901223e4e4caea2cdbed11ea7cd</p>	

http://chester:8081/PrintForms/PrintForm.aspx?GUID=d97b5901223 Local intranet | Protected Mode: Off

While loading, the 'Print' button will be disabled. Once all the requests are loaded the 'Print' button will become enabled. To cancel printing click 'Cancel'. To proceed with printing all the requests click 'Print'. All the requests will be printed to A4 paper, one request per page.

Once printed, the requests will be marked as such in the Domiciliary Lab Printing screen.

Domiciliary Request Printing						
<input type="checkbox"/> Patient	GP Practice	Status	Date Required	Printed	View	
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F URGENT *CANCELLED*	Keyworth Surgery	Cancelled	10/06/2010	✓		
<input type="checkbox"/> DATA1, DUMMY 111 111 1111 M *CANCELLED*	Keyworth Surgery	Cancelled	10/06/2010	✓		
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F *CANCELLED*	Keyworth Surgery	Cancelled	24/06/2010	✓		
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F *CANCELLED*	Keyworth Surgery	Cancelled	03/07/2010			
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F *CANCELLED*	Keyworth Surgery	Cancelled	03/07/2010			
<input type="checkbox"/> DATA1, DUMMY 111 111 1111 M	Keyworth Surgery	Submitted By Doctor	10/06/2010	✓		
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F	Keyworth Surgery	Submitted By Doctor	02/09/2010			
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F	Keyworth Surgery	Submitted By Doctor	10/09/2010			

Show Printed
 Show Non Printed

Two remove requests that have been actioned, select them and click 'Remove'. The selected requests will no longer appear in the list.

Domiciliary Request Printing						
<input type="checkbox"/> Patient	GP Practice	Status	Date Required	Printed	View	
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F URGENT *CANCELLED*	Keyworth Surgery	Cancelled	10/06/2010	✓		
<input type="checkbox"/> DATA1, DUMMY 111 111 1111 M *CANCELLED*	Keyworth Surgery	Cancelled	10/06/2010	✓		
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F *CANCELLED*	Keyworth Surgery	Cancelled	24/06/2010	✓		
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F *CANCELLED*	Keyworth Surgery	Cancelled	03/07/2010			
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F *CANCELLED*	Keyworth Surgery	Cancelled	03/07/2010			
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F	Keyworth Surgery	Submitted By Doctor	02/09/2010			
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F	Keyworth Surgery	Submitted By Doctor	10/09/2010			

Show Printed
 Show Non Printed

Selected requests removed from list.

Requests can have their printed status removed. Select the requests to change and click 'Mark Not Printed'.

Domiciliary Request Printing						
<input type="checkbox"/> Patient	GP Practice	Status	Date Required	Printed	View	
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F URGENT *CANCELLED*	Keyworth Surgery	Cancelled	10/06/2010			
<input type="checkbox"/> DATA1, DUMMY 111 111 1111 M *CANCELLED*	Keyworth Surgery	Cancelled	10/06/2010	✓		
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F *CANCELLED*	Keyworth Surgery	Cancelled	24/06/2010	✓		
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F *CANCELLED*	Keyworth Surgery	Cancelled	03/07/2010			
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F *CANCELLED*	Keyworth Surgery	Cancelled	03/07/2010			
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F	Keyworth Surgery	Submitted By Doctor	02/09/2010			
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F	Keyworth Surgery	Submitted By Doctor	10/09/2010			

Show Printed
 Show Non Printed

Selected requests marked as not printed.

The list can be filtered by printed status using the two check boxes at the bottom. Deselect one of the check boxes and click 'Refresh' to show all Printed or All Non Printed requests.

Domiciliary Request Printing						
<input type="checkbox"/> Patient	GP Practice	Status	Date Required	Printed	View	
<input type="checkbox"/> DATA1, DUMMY 111 111 1111 M *CANCELLED*	Keyworth Surgery	Cancelled	10/06/2010	✓		
<input type="checkbox"/> DATA, DUMMY 999 999 9999 F *CANCELLED*	Keyworth Surgery	Cancelled	24/06/2010	✓		

Show Printed
 Show Non Printed

Clicking the View Request icon at the end of a row will display the full request details.

Patient Test Request	
Specimen Number	10.0000083.E
Request Status	Cancelled <input type="button" value="Reinstate"/>

Patient Details			
NHS Number	111 111 1111	Hospital Number	
Surname	DATA1	Forename	DUMMY
Date of Birth	27/07/1932	Gender	Male
Address	2 MULBERRY CLOSE	Domiciliary Request	<input checked="" type="checkbox"/>

Domiciliary Details			
The Domiciliary service is for housebound patients only			
Referral Date	08/06/2010	Date Required	10/06/2010
Patient Telephone	34563456	Carer Telephone	63463456
Extra Staff Required	<input checked="" type="checkbox"/>	Extra Staff Reason	4563456346456
Keysafe Code Required	<input type="checkbox"/>		

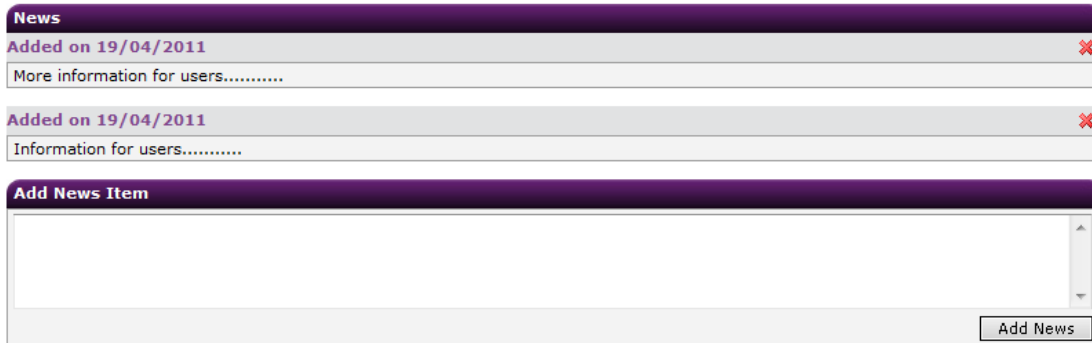
Requestor Details	
Requestor Location	Keyworth Surgery
Requestor	Dr J Clodes

News Management

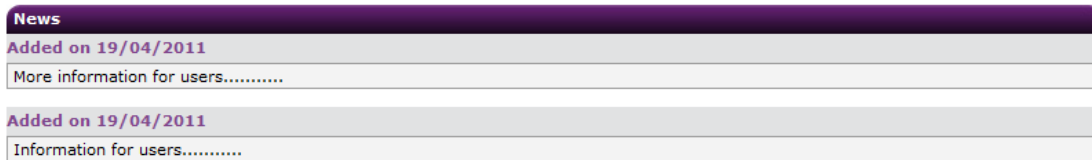
Overview

General news items can be posted to dartOCM users via the news section. Super admins can add and delete news items. All other users can only view.

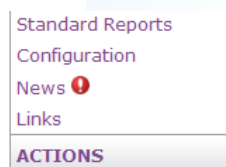
Super admin view:



Normal user view:



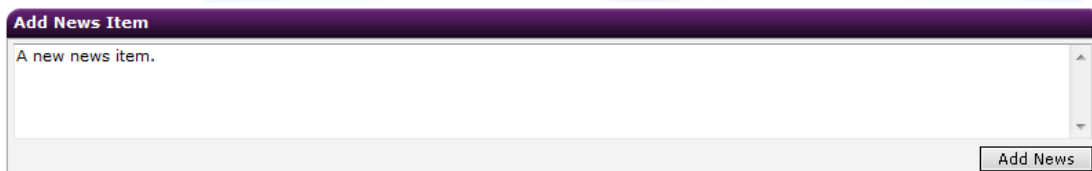
When there are new items to view, users will see an indication next to the News link.



Once the user has visited the news page the indicator is removed until a new news item is added.

Adding News

Enter the news text into the text box.



Click 'Add News'.



Removing News

News items can be removed by clicking the red cross to the right of the news item.

News	
Added on 20/04/2011 A new news item.	✘
Added on 19/04/2011 More information for users.....	✘
Added on 19/04/2011 Information for users.....	✘

Click the red cross.

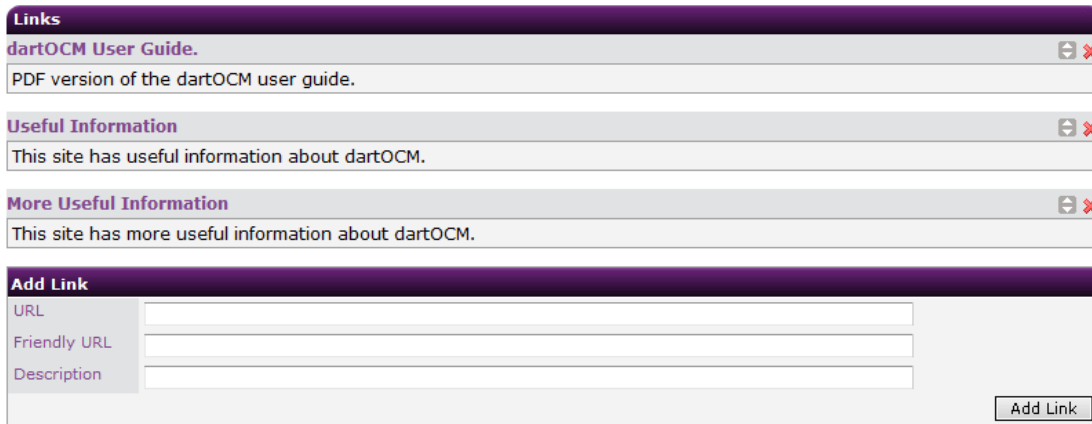
News	
Added on 19/04/2011 More information for users.....	✘
Added on 19/04/2011 Information for users.....	✘

Links Management

Overview

The Links page holds links to external web pages relevant to dartOCM users. Super admins can add and delete links. All other users can only follow the links. Links will always open in a new browser window.

Super admin view:



Links

dartOCM User Guide.

PDF version of the dartOCM user guide.

Useful Information

This site has useful information about dartOCM.

More Useful Information

This site has more useful information about dartOCM.

Add Link

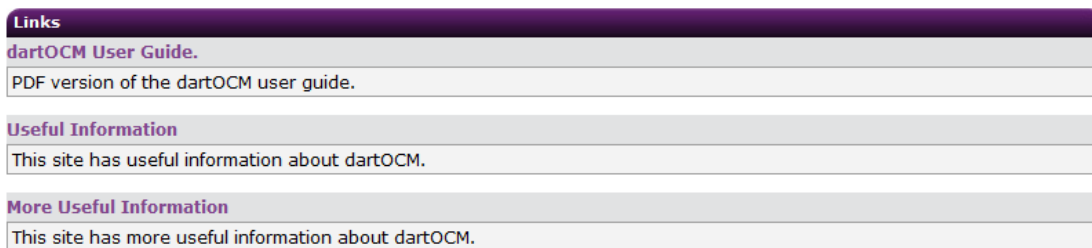
URL

Friendly URL

Description

Add Link

Normal user view:



Links

dartOCM User Guide.

PDF version of the dartOCM user guide.

Useful Information

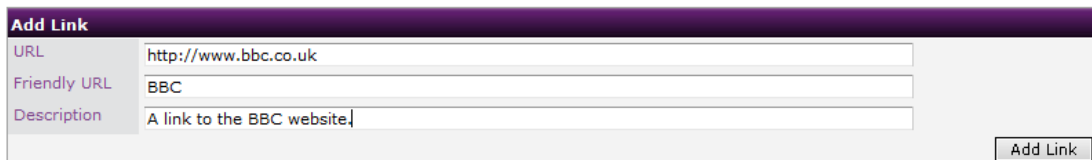
This site has useful information about dartOCM.

More Useful Information

This site has more useful information about dartOCM.

Adding Links

Complete the Add Link section.



Add Link

URL

Friendly URL

Description

Add Link

URL is the actual link address. Friendly Name is the display for the link. Description is a brief summary of the page the link points to. Click 'Add Link' to add the link.



Links

dartOCM User Guide. [Move] [Close]

PDF version of the dartOCM user guide.

Useful Information [Move] [Close]

This site has useful information about dartOCM.

More Useful Information [Move] [Close]

This site has more useful information about dartOCM.

BBC [Move] [Close]

A link to the BBC website.

Add Link

URL

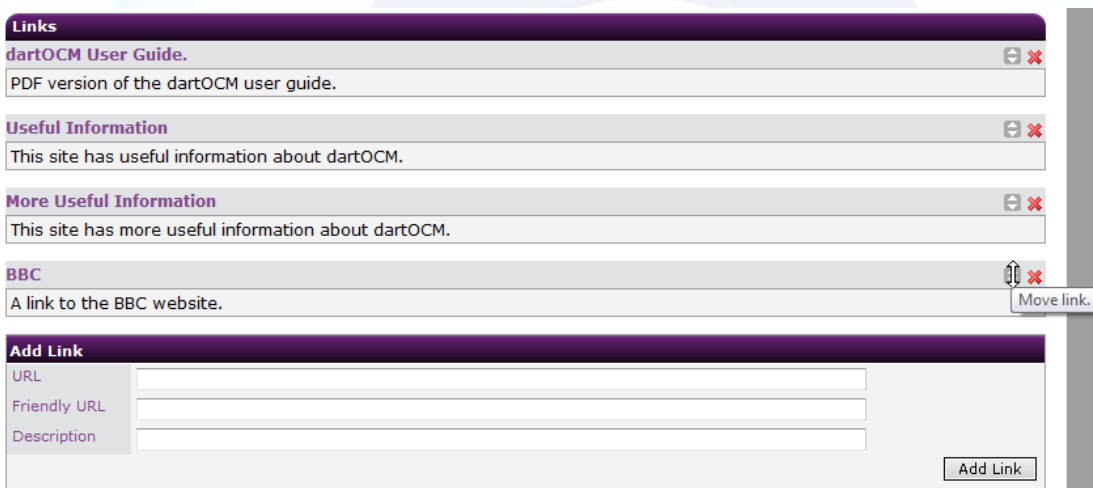
Friendly URL

Description

Link added.

Moving Links

By default new links will be added to the bottom of the list. To change the display order of the links drag a link by the grey 'Move' icon and drop into the desired position.



Links

dartOCM User Guide. [Move] [Close]

PDF version of the dartOCM user guide.

Useful Information [Move] [Close]

This site has useful information about dartOCM.

More Useful Information [Move] [Close]

This site has more useful information about dartOCM.

BBC [Move] [Close]

A link to the BBC website.

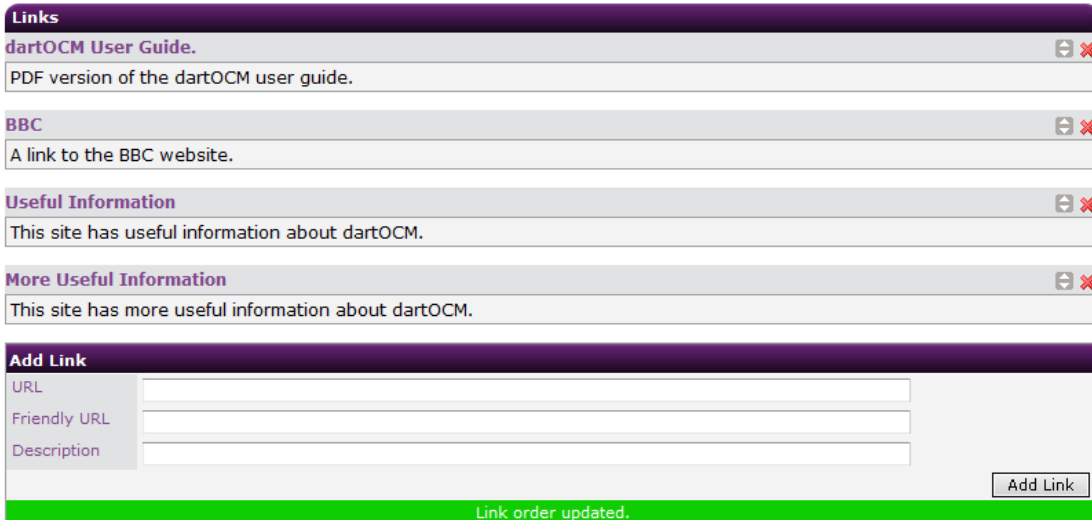
Add Link

URL

Friendly URL

Description

As soon as the link is dropped into place the order will be saved.



Links

dartOCM User Guide. [Move] [X]
PDF version of the dartOCM user guide.

BBC [Move] [X]
A link to the BBC website.

Useful Information [Move] [X]
This site has useful information about dartOCM.

More Useful Information [Move] [X]
This site has more useful information about dartOCM.

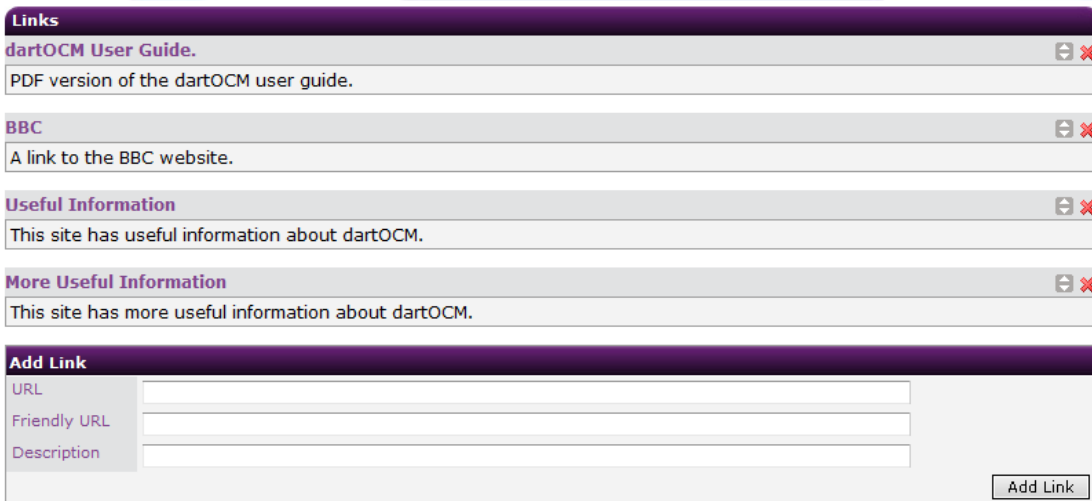
Add Link

URL
Friendly URL
Description

Link order updated.

Removing Links

Links can be removed by clicking the red cross to the right of the link.



Links

dartOCM User Guide. [Move] [X]
PDF version of the dartOCM user guide.

BBC [Move] [X]
A link to the BBC website.

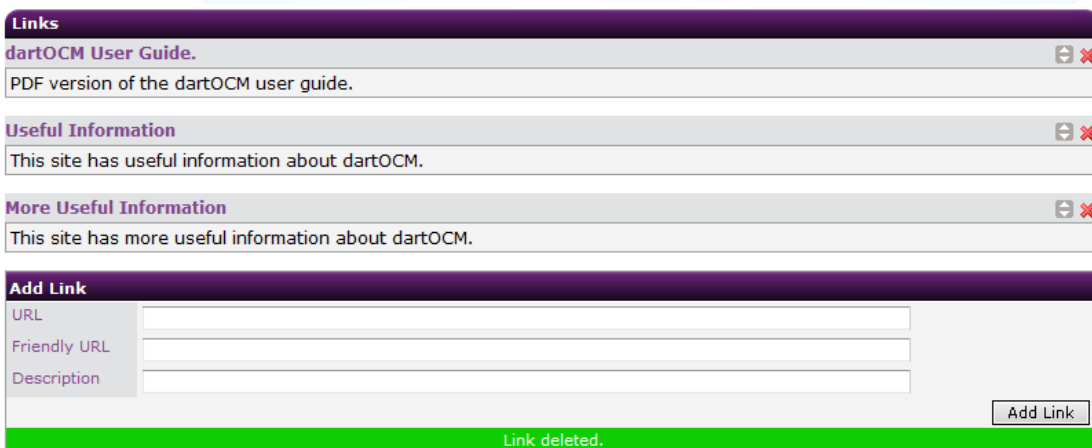
Useful Information [Move] [X]
This site has useful information about dartOCM.

More Useful Information [Move] [X]
This site has more useful information about dartOCM.

Add Link

URL
Friendly URL
Description

Click the red cross.



Links

dartOCM User Guide. [Move] [X]
PDF version of the dartOCM user guide.

Useful Information [Move] [X]
This site has useful information about dartOCM.

More Useful Information [Move] [X]
This site has more useful information about dartOCM.

Add Link

URL
Friendly URL
Description

Link deleted.