WindoPath®

The end-to-end LIS for all laboratories

V8.0 User Manual

Psyche Systems Corporation

WindoPath - Version 8.0

Laboratory Information System for Microsoft Windows*

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Introduction

Welcome to **WindoPath**, the point and click laboratory information system. **WindoPath** is a unique information system written in an object-oriented programming language designed to run on IBM compatible computers for the Microsoft Windows environment. It also makes use of client-server technology where the client (PC) accesses a database stored on the File Server. This open system has the ability to run on a variety of server platforms.

WindoPath facilitates the processing of laboratory cases with a complete Windows interface allowing multiple accesses to various data at any time.

This User Guide is a reference to all the generally used components of **WindoPath**.

Chapter 1 – Overview gives a general description of **WindoPath**, including types of windows, special keys, workflow and launching the program.

Chapter 2 – Patients & Visits describes how to manually add Patients and Visits into **WindoPath**, as well as the type of information stored for each.

Chapter 3 – Accessioning describes how to accession new Cases into **WindoPath**, create Specimens and print labels.

Chapter 4 – Current Case, Grossing and Result Entry describes how to access all current cases that have been accessioned and are still active, as well as methods for result entry.

Chapter 5 – Case Procedures and Profiles describes how to add, edit or delete Profiles and Procedures, in addition to how to result Procedures.

Chapter 6 – Diagnostic Result Entry & Sign Out describes the steps involved in diagnostic result entry and signing out cases. Since charges are usually adjusted when Cases are signed out, adding, deleting and modifying charges is also described in this chapter.

Chapter 7 – Final Report and Report Distribution describes how once Cases have been signed out, they have the status of *Needs Final Report*. This chapter describes the steps involved in report distribution.

Chapter 8 – Pap Cases describes how to process Pap Cases.

Chapter 9 – Prostate Cases describes how to process Prostate Cases.

Chapter 10 – Human Resources describes the **Human Resources Library** which contains all of the Pathologists, Physicians, Patients and Users.

Chapter 11 – The Library describes the Library that contains various tables of predefined data used in the processing of Cases, including charge codes, source types and canned paragraphs.

Chapter 12 – The Archives describes how to access inactive (archived) Case data.

Chapter 13 – The Formatter describes the options available for formatting Case reports.

Chapter 14 – Manager's Guide describes the managerial functions that can be performed in **WindoPath**.

Chapter 15 - Preferences describes the many preference options available in **WindoPath**.

Chapter 16 – WindoPath CliniCAL: Since Clinical Pathology Cases are processed differently than Anatomic Pathology Cases, they are described separately in this chapter. The WindoPath CliniCAL Module is also available as a standalone Clinical Laboratory software system.

Chapter 1 - Overview

What's Inside

WindoPath Laboratory Information System is a highly advanced, full–featured software system with a modular, customizable design, allowing it to quickly and easily adapt to the specific needs of laboratories of all sizes and testing capabilities. WindoPath is used in hospitals, private pathology groups, physician office labs and specialty labs like Cytology, Dermatopathology, Urology, Gastroenterology, Molecular Pathology, Genetics and others.

The WindoPath LIS is available as a robust, standalone Anatomic Pathology software system or a standalone Clinical Laboratory software system. In addition, it is also available for laboratories who wish to utilize WindoPath LIS with both systems integrated. This enables laboratories to have the ability to expand their test menus, while providing a completely seamless, full history and view of each patient and case, including truly combined report capabilities.

The WindoPath LIS system is an open system that runs on a Microsoft SQL Server database. The database consists of a series of tables, each storing a specific type of information. For example, there is one table for Physicians, another for Pathologists and another for Specimens.

Each table has a unique identifier for each record. Often, this unique identifier is the code, such as the Physician code. Sometimes, it is an internal ID number used by WindoPath. Often, there are pointers in one table that point to a record or object, in another table. For example, each Case record in the Case table has a pointer to one of the Pathologists in the Pathologist table who was assigned to the Case. These pointers are either internal ID numbers or codes.

WindoPath's Graphical User Interface (GUI) consists of a series of contemporary, Microsoft-conforming windows that open into the database. These windows display the contents of the database in a format that is useful to the pathology personnel. Sometimes, one window displays the complete record of a single table, for example, the Zip Code Window. Other times, one window displays data from multiple tables. For example, the Patient Window displays data from both the Patient table and the Visit table.

Specific WindoPath windows are described in later chapters where appropriate. Some general considerations about windows and boxes are described in this chapter.

Windows

WindoPath consists of a series of windows that open to the database. These windows contain a variety of components depending on their function. Windows are usually opened by clicking an **Open button** or by selecting a menu option. To close windows, either click the **X** in the upper right corner or click **Done** or **Cancel**.

Windows can contain any of the following components:

Fields that are only for display show their text in italics and cannot be edited in that window.

Fields – display demographic data such as Patient name, Pathologist or Account Number. Fields labeled with a greater than sign (>) point to an object from one of the libraries. You MUST use **CTRL+L** or a code to enter data in fields labeled with a greater than sign (>). You cannot enter free text. In these fields, **CTRL+L** is used to list stored phrases and paragraphs. You can enter partial text and press **CTRL+L** for full entry if there is a match.

Date Fields – consist of three separate fields for month, day and year. Press **TAB** to move to the next field.

Action buttons are identified by extra shading around the button.

Action Buttons – are clicked to perform an action. For example, clicking **Done** exits a window. Windows might have an **Action button** which is executed by pressing **ENTER**. **Action buttons** might change in a given window to predict what will be your next logical action.

List Boxes – are boxes that list multiple data of the same type. Within the list, you can move to the desired item by pressing a character to quickly move through the list to those items that begin with the character entered. Scrolling can also be used by clicking the scrolling bar on the right of the box. The scrolling bar only appears if the list is longer than the box.

Tabs – are the display and entry modes of the certain windows in WindoPath. Press **ENTER** to perform a carriage return in the tab. Press **TAB** to insert a tab.

Menus – drop-down menus are listed in the menu bar of each window. To open a menu, click the name of the menu. Click on menu items to select them.

Quick Find

*When a **library window** is first opened, the cursor is positioned to **Find: field.** Press **TAB** to move the cursor to the list box.*

Library Windows containing list boxes also contain a **Find: field** that allows you to search for an item using more than one character. In the **Find: field**, enter the first character of the item you wish to find. If there are any items in the list that begin with that character, the cursor moves to the first item in the list matching the entered criteria. If you then enter a second character and there is an item that begins with both characters, the cursor will move to the corresponding item. If there is no match, the cursor does not move. This search feature is useful when you have a long list of items.

The **Find: field** is labeled with the name of the column to search by, for example, **Find Code**. To search a different column, right click in the name of the column, for example, Text. The **Find: field** will now be labeled **Find Text**.

Keyboard Shortcuts

A number of menu items and commands throughout **WindoPath** can be invoked by pressing a combination of keys. These keyboard shortcuts, once learned, streamline the processing of cases by cutting down on the number of keystrokes.

The following table lists all of the <u>Keyboard Shortcuts</u> used in WindoPath:

Command	Operation
ALT+A	*Enter Archive Cases* on the **Accession Window**; *Add Code* on the **Charge Selection Window -** *Charge Selection Menu; Annotate* on the **Image Window** – *Image Menu*
ALT+A+C	Opens the **Accession Window** from the **Quick Case Window**
ALT+SHIFT+A	*Remove Code* on the **Charge Selection Window -** *Charge Selection Menu; Choose Available Number* on the **Accession Window** – *Case Menu*
ALT+B	*Edit Menu -* **Bold**
ALT+CTRL+B	*Edit Menu –* **Bold Italic**
ALT+C	*Capture Images* on the **Consult Window** – *Consult* and the **Quick Case Window** – *Add/Delete Menu*
ALT+D	*Next Diagnosis* on the **Quick Case Window** – *Navigate Menu*; *Go Down* on the **Accession Window** – *Navigation Menu*
ALT+SHIFT+D	*Previous Diagnosis* on the **Quick Case Window** – *Navigate Menu*; *Go Up* on the **Accession Window** – *Navigation Menu*
ALT+E	*Enter Code* on the **Charge Selection Window -** *Charge Selection Menu*
ALT+F	*Go to Full* on the **Quick Case Window** – *Navigate Menu*
ALT+G	*Go to Gross* on the **Quick Case Window** – *Navigate Menu* (brings the Gross tab forward)
ALT+CTRL+G	*Go to Top* on the **Accession Window** – *Navigation Menu*
ALT+I	*Edit Menu -* **Italic**
ALT+SHIFT+I	*In House Only* on the **Charge Selection Window** – *Charge Selection Menu*
ALT+L	*Look up Case* on the **Accession Window** – *Case Menu*; *Add Profiles* on the **Procedure List Window** – *Profiles Menu*
ALT+M	*Go to Micro* on the **Quick Case Window** – *Navigate Menu*; *Specify Copies* on the **Pap Case Window** – *Case Menu*
ALT+N	*Edit Menu –* **Normal**
ALT+P	*Next Specimen* on the **Quick Case Window** – *Navigate Menu*; *Print Report* on the **Pap Case Window** – *Case Menu*; *Edit Procedure* on the **Procedure List Window**; *Add Physician* on the **Accession Window** – *Case Menu*
ALT+SHIFT+P	*Previous Specimen* on the **Quick Case Window** – *Navigate Menu*
ALT+CTRL+P	*Edit Menu –* **Page Break**

Command	Operation
ALT+Q	*Switch to Quick View* on the **Pap Case Window** – *Other Menu*
ALT+R	*Procedures* on the **Accession Window** – *Case Menu*; *Case Procedures* on the **Quick Case Window**
ALT+SHIFT+R	*Procedures* on the **Accession Window** – *Specimen Menu*; *Specimen Procedures* on the **Quick Case Window**
ALT+S	*Edit Menu – **Spell Check***
ALT+SHIFT+S	*Send Outs Only* on the **Charge Selection Window –** *Charge Selection Menu*
ALT+T	*Increment Selected Procedures* on the **Procedure List Window** – *Procedures Menu*; *Toggle Case/Specimen* on the **Charge Selection Window -** *Charge Selection Menu*
ALT+SHIFT+T	*Decrement Selected Procedures* on the **Procedures Window** – *Procedures Menu*
ALT+U	*Edit Menu – **Underline***
ALT+X	*Sign Out* on the **Quick Case Window** and **Add-On Window**
ALT+1	Selects the first **adequacy radio button** on the **Pap Case Window**
ALT+2	Selects the second **adequacy radio button** on the **Pap Case Window**
ALT+3	Selects the third **adequacy radio button** on the **Pap Case Window**
ALT+,	*Go To Diagnosis* on the **Quick Case Window** – *Navigate Menu*
CTRL+A	*Select All* (Highlights all Cases in the **Case List Window** or all procedures in the **Procedure List Window**)
CTRL+ALT+A	*Assign Diag. to All Specimens* on the **Quick Case Window** – *Add/Delete Menu*
CTRL+B	*Commands Menu – **Dispatcher Minimize***
CTRL+SHIFT+B	*Basic Needs Only* on the **Case List Window** – *Select Menu*
CTRL+C	Copies the selected text to the clipboard
CTRL+SHIFT+C	*Specify Copies* on the **Quick Case Window** – *Reporting Menu*
CTRL+D	*Commands Menu - **Done*** (Closes the current window saving any changes)
CTRL+SHIFT+D	*Add Diagnosis* on the **Quick Case Window** – *Add/Delete Menu*
CTRL+E	*Commands Menu - **Cancel*** (Closes the current window without saving any changes)
CTRL+SHIFT+E	*Commands Menu – **Expand Text Box***
CTRL+F	*Commands Menu – **Dispatcher to Front***

Command	Operation
CTRL+H	*Help Menu – **Contents***
CTRL+SHIFT+H	*Help Menu – **Self Help***
CTRL+I	***Next Blank*** (Moves the cursor to blanks underscores in canned paragraphs)
CTRL+K	***Load Case*** on the **Quick Case Window** – *Add/Delete Menu*; **Load Case** on the **Pap Case Window** – *Other Menu*; **Load Case** on the **Case List Window** – *Reset Menu*
CTRL+L	***Display List*** (In any field, finds all library entries for that field. If there is only one item in the library for that field, **WindoPath** automatically inserts that item)
CTRL+ALT+L	***Edit Profile*** on the **Procedure List Window** – *Profiles Menu; **Show Links*** on the **Accession Window** – *Patient Menu*
CTRL+SHIFT+L	*Commands Menu - **By Code***
CTRL+M	***Advance Selected Cases*** on the **Case List Window** – *Case List Menu*; *Increment List* on the **Procedure List Window**
CTRL+ALT+M	***Show Matching Patients*** on the **Accession Window** – *Patient Menu*
CTRL+SHIFT+M	*Decrement List* on the **Procedure List Window; *My Cases*** on the **Case List Window** – *Case List Menu*
CTRL+N	*File Menu – **New/Next*** (Executes the **Next button**; clears fields of the **Accession Window**)
CTRL+SHIFT+N	*File Menu – **Previous***
CTRL+O	*File Menu - **Open***
CTRL+SHIFT+O	***Orders*** on the **Accession Window** - *Other Menu*
CTRL+SHIFT+P	***Print Report*** on the **Quick Case Window** – *Reporting Menu*
CTRL+ALT+SHIFT+P	***Change User Pathologist*** on the **Pap Case Window**- *Other Menu*
CTRL+Q	***Quit*** (Quits **WindoPath**)
CTRL+SHIFT+Q	*Print/Generate QC Labels* on the **Procedure List Window** – *Labels Menu*
CTRL+R	***Result Entry*** on the **Accession Window** – *Navigation Menu*
CTRL+SHIFT+R	*Commands Menu- **Physicians***
CTRL+S	*File Menu - **Save*** (Saves new Patients, Visits, Cases, Specimens or Diagnoses in the **Accession Window)**
CTRL+ALT+S	*Edit Menu - **Superscript***
CTRL+SHIFT+S	***Search*** (Searches for words or phrases in text boxes)
CTRL+ALT+T	*Edit Menu – **Date/Time Stamp***

Command	Operation
CTRL+U	*Update* (Updates the current window with any new data from the database; this option is generally not used, as the Updater runs automatically every 30 seconds)
CTRL+ALT+U	*Edit Menu – **Un superscript***
CTRL+V	***Paste*** (Pastes the contents of the clipboard to the cursor position in a text editing box)
CTRL+ALT+V	***Dictation*** on the **Quick Case Window** – *Add/Delete Menu*
CTRL+SHIFT+V	*Help Menu – **Audio Visual Help***
CTRL+W	***Word Process*** on the **Quick Case Window** *– Reporting Menu*
CTRL+X	***Cut*** (Deletes the selected text in a text editing box)
CTRL+Y	***Find Matching Patients*** on the **Accession Window** *– Patient Menu*
CTRL+ALT+Y	*Commands Menu – **Yellow Pages***
CTRL+.	***Case Clin. Info*** on the **Accession Window** *– Case Menu*; ***Go To Pathologist*** on the **Quick Case Window** *– Navigate Menu*
CTRL+=	***Charges*** on the **Quick Case Window** *– Add/Delete Menu* (Opens the **Charge Selection Window**); ***View Charges*** on the **Pap Case Window** *– Case Menu;* ***Update Selected Cases*** on the **Case List Window** *– Reset Menu*
CTRL+,	***Grosser*** on the **Quick Case Window** *– Modify Menu* (opens the list of Pathologist initials)
CTRL+1	Selects the first category check box on the **Pap Case Window**
CTRL+2	Selects the second category check box on the **Pap Case Window**
CTRL+3	Selects the third category check box on the **Pap Case Window**
CTRL+4	Selects the fourth category check box on the **Pap Case Window**
CTRL+5	Selects the fifth category check box on the **Pap Case Window**
CTRL+6	Selects the sixth category check box on the **Pap Case Window**
CTRL+Right	***Next Tab*** on the **Quick Case Window** *– Navigate Menu* and the **Accession Window** *– Navigation Menu*
CTRL+Left	***Previous Tab*** on the **Quick Case Window** *– Navigate Menu* and the **Accession Window** *– Navigation Menu*
F5	***Sign Out*** on the **Pap Case Window** *– Case Menu*

Command	Operation
F6	*Flag for Rescreen* on the **Pap Case Window** – *Other Menu*
F7	*Flag for Review* on the **Pap Case Window** – *Other Menu*
SHIFT+END	*Show Drop Down* on the **Case List Window** – *Select Menu*
SHIFT+HOME	*Close Drop Down* on the **Case List Window** – *Select Menu*

The following table lists the <u>Keyboard Shortcuts</u> used in text editing:

Command	Operation
CTRL+A	Selects all text in a text editing box
CTRL+C	Copies the selected text to the clipboard
CTRL+SHIFT+S	Search
CTRL+V	Pastes the contents of the clipboard to the cursor position in a text editing box
CTRL+X	Deletes the selected text in a text editing box
ALT+B	Defines bold text
ALT+CTRL+B	Defines bold italic text
ALT+I	Defines italic text
ALT+N	Defines normal text
ALT+CTRL+P	Page break
ALT+S	Spell check
ALT+U	Defines underlined text

More About CTRL+L

Pressing **CTRL+L** in any field that responds to any library in the **Librarian** will display the entire contents of that library.

Entering a string of data followed by **CTRL+L** searches by *text* and finds all matching library entries for that data type. For example, entering LIV in the **Source field** of the **Accession Window** and pressing **CTRL+L** would find sources LIVER-Biopsy and LIVER-Nephrectomy.

Entering a string of data followed by **CTRL+SHIFT+L** searches by *code* and finds all matching library entries for that data type. For example, entering LIV in the **Source field** of the **Accession Window** and pressing **CTRL+SHIFT+L** would find sources with code LIVER1 and LIVER2.

You can also search by code by entering a pound sign (#) followed by the code and **CTRL+L**.

If there is only one match for the entered text, that match is inserted automatically.

Starting WindoPath

Double click on the **WindoPath** icon on your desktop.

The **Database Selection Window** opens (Figure 1). In the drop-down menu, the default database that will be listed is WINDOPATH. If you are set up to connect to a different database (for example TRAIN), click the drop-down menu and select the database you wish to connect to.

After selecting the appropriate databases in one or both of the drop-down menus, click the green **Launch button**.

Figure 1 – **Database Selection Window**

After selecting the database, the **WindoPath Welcome Window** opens (Figure 2).

Figure 2 – **WindoPath Welcome Window**

Enter your User ID in the **ID field**. Enter your password in the **Password field**. Click **Done** or press **ENTER**. The **Dispatcher Window** opens (Figure 3).

Dispatcher Window

The **Dispatcher Window** is the main or **Home** window in **WindoPath** (Figure 3). When you are in Windopath, it is always open.

All operations in **WindoPath** are performed from the **Dispatcher Window** by either clicking a button, an icon or an area of the screen.

The empty window in the top, right corner of the **Dispatcher Window** lists all of the currently open windows. If you want to return to one of these windows, simply click once on the item.
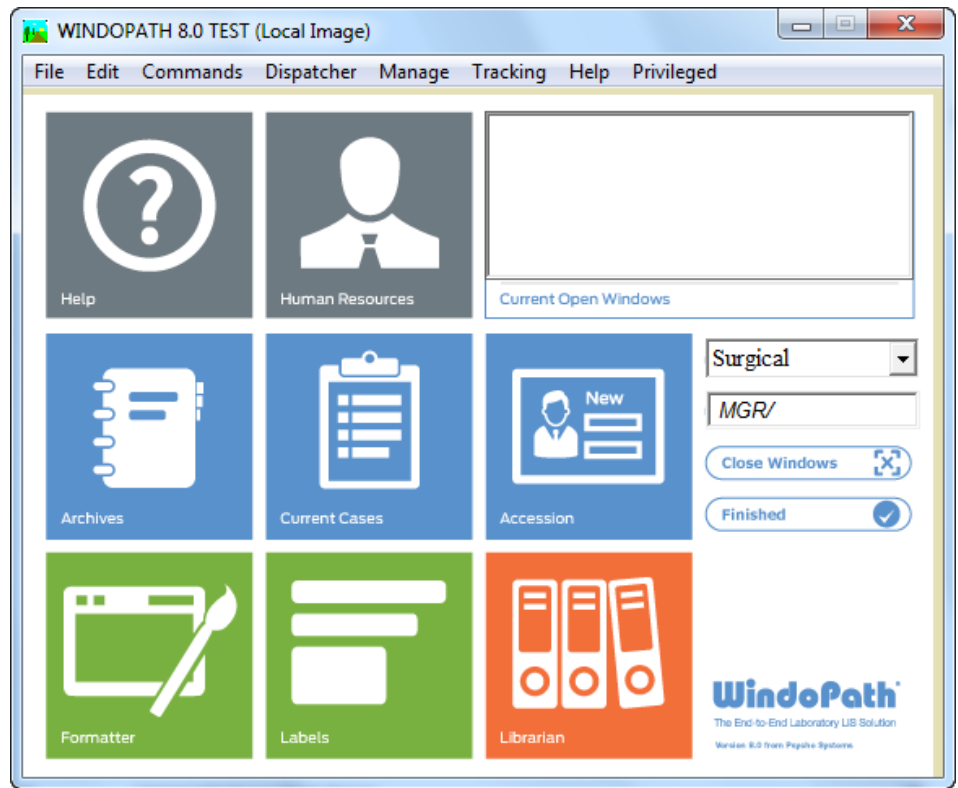
Figure 3 – The Color Tile Dispatcher Window Loading the Database

Once you have connected to the database, **WindoPath** loads the appropriate data into your PC's memory. This includes all active data such as cases in progress and any completed cases that have not been deactivated.

The right side of the **Dispatcher Window** shows the activity between the client (PC) and the database on the server (Figure 4). The drop-down menu usually used for designating the Case Type when accessioning, displays **Loading…** until the database is fully loaded. A bar appears under the **Finished button** showing the progress of the database load.

You must wait for all of the data to be loaded before starting. When the gray bar disappears and the drop-down menu displays a Case Type, the process is complete and you are free to proceed.
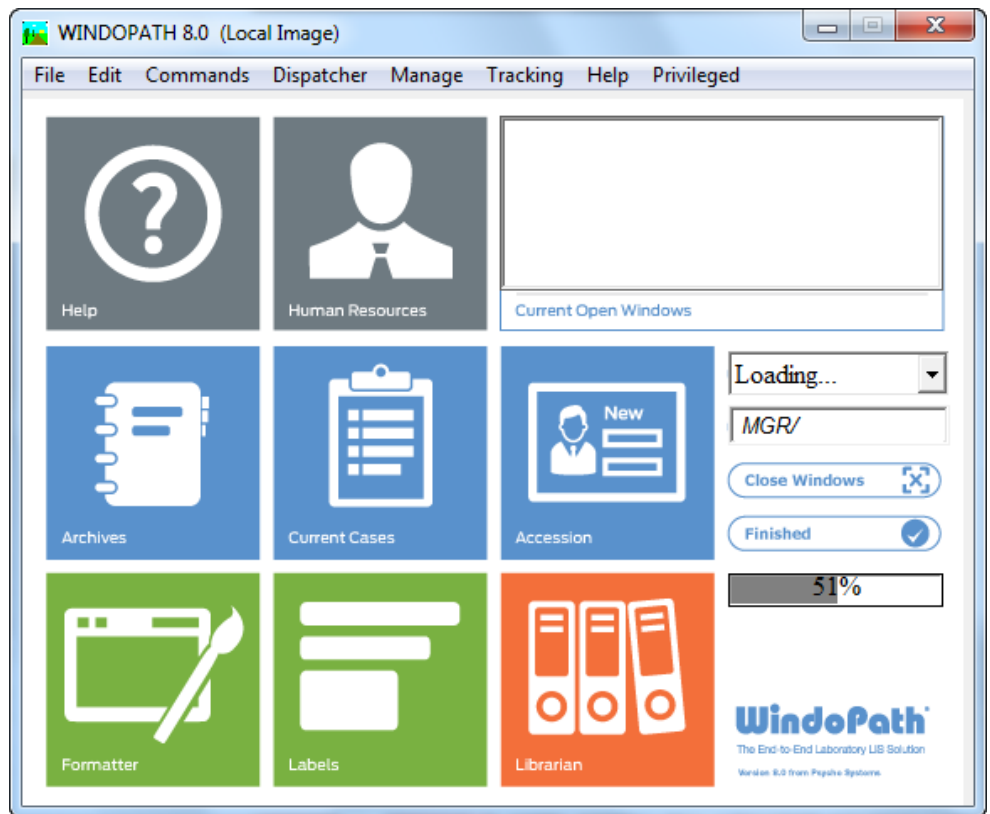
Figure 4 – **The Color Tile Dispatcher Window Loading…**

Dispatcher Window Action Buttons

- **Accession** – opens the **Accession Window** to create new Patients, Visits and Cases. It is described in *Chapter 2 – Patients and Visits* and in *Chapter 3 – Accessioning.*

- **Archives** – allows lookup of all active and inactive cases. It is described in *Chapter 12 – The Archives.*

- **Current Cases** – allows lookup of active cases. It is described in *Chapter 4 – Current Cases, Grossing and Result Entry.*

- **Labels –** opens the **Labels Window** for the printing of specimen container and requisition labels. It is described in *Chapter 3 – Accessioning.*

- **Human Resources –** stores libraries of Pathologists, Physicians, User Accounts and Patients. It is described in *Chapter 10 – Human Resources.*

- **Librarian** – stores tables of predefined data used in the processing of cases. It is described in *Chapter 11 – The Library.*

- **Formatter** – used to design the format for the various case report types and label types. It is described in *Chapter 13 – The Formatter.*

- **Finished** – exits **WindoPath**.

Case Types Drop-Down Menu

The *Case Types Drop-Down Menu* is located on the **Dispatcher Window.**

A **Case Type** may be selected in the **Case Type Drop-Down Menu** before opening the **Accession Window**. By default, the menu displays the list of available case types that are set up in the system.

Each Case Type has a defined **Case Class** which determines the workflow of the Case Type. Certain Case Classes tell WindoPath to open different windows or prompts that are specific to that workflow throughout the life of the case. A Case Class can fall under 1 of 12 different categories. These categories include: Autopsy, Bone Marrow, Cytology, Clinical, General, External, Histology, Non-GYN, Pap, Prostate, Surgical and Veterinary.

Some categories only have 1 Case Class available. For example: **Surgical**.

However, some categories have more than 1 Case Class available. For example: The Autopsy category has 5 available Case Classes: **Autopsy1Case**, **Autopsy2Case**, **Autopsy3Case**, **Autopsy4Case** and **Autopsy5Case**.

You may create and define as few as 1 Case Type or well over 100 Case Types. Refer to *Chapter 11 – The Library* for more information about the Case Types Library.

Dispatcher Window Menus

The **Dispatcher Window** contains the following menus: *File, Edit, Commands, Dispatcher*, *Manage, Tracking* and *Help*. *File, Edit, Commands* and *Help* are described in this chapter. *Dispatcher*, *Manage* and *Tracking* are described in *Chapter 14 – Manager's Guide*.

Which commands are available for use in these menus will differ depending upon which window you are in when you invoke the menu. The table that follows will give you a general description of their function when they are available.

File Menu

Operation	Command	Description
New-Next	**CTRL+N**	Creates a new object from a blank window or opens the next item in a list if one is currently displayed
Previous	**CTRL+SHIFT+N**	Opens the previous item in a list if one is currently displayed
Open	**CTRL+O**	Opens the window for the currently selected item
Save	**CTRL+S**	Saves new data
Save As…		NOT USED
Print Window		Opens the standard Printer Dialog, allowing the current window to be printed to the selected printer
Print Setup…		Opens the standard Print Setup Window for the PC's default printer
Quit	**CTRL+Q**	Exits the open window

Edit Menu

Operation	Command	Description
Undo		Undoes the last text editing function in the current **Quick Case Window** tab
Cut	**CTRL+X**	Deletes the selected text in a text editing box (copies text to the clipboard)
Copy	**CTRL+C**	Copies the selected text to the clipboard
Paste	**CTRL+V**	Pastes the contents of the clipboard to the cursor position in a text editing box
Clear Selection		Clears just the selected text in a text editing box (does not copy text to the clipboard)
Clear		Clears all text from the current text editing box
Select All	**CTRL+A**	Selects all text in a text editing box
Next Blank	**CTRL+I**	Moves the cursor to blanks (underscores) in canned paragraphs
Next Underscore	**ALT+SHIFT+I**	Moves the cursor to blanks (underscores) in canned paragraphs
Normal	**ALT+N**	Defines normal text
Bold	**ALT+B**	Defines bold text
Italic	**ALT+I**	Defines italic text
Underline	**ALT+U**	Defines underlined text
Bold Italic	**ALT+CTRL+B**	Defines bold italic text
Date/Time Stamp	**ALT+CTRL+T**	Inserts the current date and time in a text editing box
Time Stamp	**CTRL+T**	Inserts the current time in a text editing box
Switch Case		In the **Quick Case Window**, changes highlighted text from uppercase to lowercase and lowercase to uppercase
Insert Page Break	**ALT+CTRL+P**	Inserts a page break
Spell Check	**ALT+S**	Starts the spell checking program
Search	**CTRL+SHIFT+S**	Search/replace function to search for words or phrases in text boxes
Toggle Mandatory		In the **Accession Window**, defines the currently selected field as a required field

Operation	Command	Description
Toggle Tab Lock		In the **Accession Window**, defines the currently selected field as locked; text may not be entered on locked fields, except by a Manager; user-defined locked fields are shaded in red
Toggle Tab Skip		In the **Accession Window**, defines the currently selected field to be skipped when tabbing; you cannot skip required fields
Toggle Upper Case		In the **Accession Window**, defines the currently selected field to use only upper case
Superscript	**ALT+CTRL+S**	Defines superscript text
Unsuerscript	**ALT+CTRL+U**	Reverts superscripted text to normal text

Commands Menu

Operation	Command	Description
Audit List		Displays a full audit trail for the currently selected object
By Code	**CTRL+SHIFT+L**	In any field, if a full code is entered, finds the library entry matching the entered code and inserts it; if a partial code is entered, displays a list of entries matching the entered criteria
Cancel	**CTRL+E**	Closes the current window without saving any changes
Clone		In **Human Resources** and the **Librarian**, creates a duplicate of the selected item
Dispatcher To Front	**CTRL+F**	Moves the **Dispatcher Window** to the front
Dispatcher Minimize	**CTRL+B**	Minimizes the **Dispatcher Window**
Display	**CTRL+L**	In any field, finds all library entries for that field; if there is only one item in the library for that field, **WindoPath** automatically inserts that item
Display object		NOT USED
Done	**CTRL+D**	Closes the current window saving any changes (mimics

Operation	Command	Description
		the clicking the **Done button**)
Physicians	**SHIFT+CTRL+R**	Opens the **Physician List Window**
Remove Reservation		Removes the reservation from the current object (only if the preference to Disallow Access to Reserved Items has been enabled)
Update	**CTRL+U**	Updates the current window or list with any new data added to the database since the window or list was opened
Set background color		If the preference to apply random background color has been enabled, saves the current color setting as the default color for all windows
Specify User Fields		Allows the creation of three user-defined text fields for each tab of the **Accession Window**
Yellow Pages	**ALT+CTRL+Y**	Opens the **Yellow Pages Library**
Expand Text Box	**CTRL+SHIFT+E**	Opens an enlarged window for the current text editing field to allow complete viewing of large text (in **Quick Case Window** and **Libraries**)

Help Menu

Operation	Command	Description
PDF Help		Displays the **WindoPath** User Manual in PDF format (Acrobat Reader must be installed)
Self Help	**CTRL+SHIFT+H**	Displays a folder for each WindoPath window into which Users may store self-help notes; when a User invokes Self Help, they will be brought to the folder corresponding to the current window
Audio Visual Help	**CTRL+SHIFT+V**	If you have loaded your own audio visual files, this will navigate to the Audio Visual directory, displaying

		available audio-visual help files for the current window
Audio-Visual Tutorial		If you have loaded your own audio visual files, this will navigate to the Audio Visual directory, displaying all available audio-visual help files
Psyche Website		Opens your internet browser to Psyche's Website, www.psychesystems.com

Chapter 2 – Patients & Visits

Patient Admissions

Before you can create Cases on a Patient, the Patient must first be admitted into the **WindoPath** database. Patients and Visits may be entered automatically into the database by an ADT, Order Entry interface or manually through **WindoPath**. This section describes how to manually create Patient admissions in **WindoPath**, which includes the creation of both a **Patient** record and a **Visit** record.

Patients and Visits are manually added to **WindoPath** through the **Accession Window**, shown in Figure 1.

Figure 1 – **Accession Window**

Accession Window

The **Accession Window** consists of six **tabs.** The first four specifying the items necessary to create a Case. The fifth, the Diagnosis tab, is used for archive cases. The sixth, the Labels tab, is used to print specimen container labels.

Other parts of the **Accession Window** include the **Title Bar** at the top of the window, the **Case Type Box**, the **Case Number Boxes** (prefix, year and accession number), the **Default Action button** and the **Done button**.

(For information regarding the **Title Bar**, **Case Type Box** or **Case Number Boxes**, refer to *Chapter 3 – Accessioning*).

Navigating the Tabs

You can navigate through the tabs in one of several ways. You can click any tab to bring it forward. You can use the *Navigation Menu's **Next Tab*** or ***Previous Tab*** menu items. You can also use the keyboard shortcuts **CTRL+Right Arrow** to move to the next tab or **CTRL+Left Arrow** to move to the previous tab. You can use the **default Action button** at the bottom of the **Accession Window.** When it displays the name of a tab, the User can click it or press **Enter** to go to that tab.

Required Fields

The required fields in each **Accession Window** tab are shaded in blue.

Toggle Mandatory

The ***Toggle Mandatory*** menu item from the *Edit Menu* allows the user to define additional required fields. To define a mandatory field, click in the field and select ***Toggle Mandatory***. Mandatory fields are shaded in the User-defined color selected in Preferences. To redefine a mandatory field as non-mandatory, click in the shaded field and select ***Toggle Mandatory***.

Toggle Tab Skip

The ***Toggle Tab Skip*** menu item from the *Edit Menu* allows the user to define fields that should be skipped when tabbing. To define a skipped field, click in the field and select ***Toggle Tab Skip***. Skipped fields are shaded in gray. To redefine a skipped field as non-skipped, click in the gray shaded field and select ***Toggle Tab Skip***. NOTE: You cannot skip required fields, shaded in blue.

Toggle Tab Lock

The ***Toggle Tab Lock*** menu item from the *Edit Menu* allows the user to define locked fields. Text may not be entered on locked fields except by a Manager. User-defined locked fields are shaded in red. To define a locked field, click in the field and select ***Toggle Tab Lock***. To unlock a Locked field, a manager must click in the field, click the Edit Menu and select Toggle Tab Lock.

Date Fields

Many date fields in **WindoPath** (for example, the Collected and Received dates on the **Accession Window** – **Case tab**) are filled in automatically with today's date. You may change any date by typing the new date in the field or by press **CTRL+L** to open

the date modification window. Enter the number of days before or after today in the numeric box and click **Done**.

Deleting a Date

To delete a date from a date field, place the cursor in the field and press **CTRL+L**. Click **Delete Date** then click **Done**.

Default Action Button

The **Action button** at the bottom of the **Accession Window** indicates the next logical operation to be performed while accessioning. For instance, after creating a Patient, the **Action button** would read **Visit**, enabling you to move quickly to the **Visit tab** by clicking the button or pressing **ENTER**.

Done Button

Patient and Visit data are automatically saved when clicking the Action button to go to the next tab.

The **Done button** is used to close the **Accession Window** and save data. Data can also be saved by pressing **CTRL+S** on the keyboard or selecting *Save* from the *File Menu*. At the prompt **Really save**, click **Yes** or press **ENTER**.

Introduction to the WindoPath Database

Before creating a Patient, it is important to understand the way that the WindoPath database is constructed.

The database is constructed hierarchically as follows:

- The Patient is at the top of the hierarchy. The Patient is identified by a unique medical record number (patient id).

- The second level in the hierarchy is the Visit. Each Visit is identified by a unique WindoPath account number. Visit has a direct relation to Patient and vice versa.

- The third level in the hierarchy is the Case. Case has a direct relation to Visit and vice versa.

- The fourth level in the hierarchy is Specimen. Specimen has a direct relation to Case and vice versa.

- The fifth level in the hierarchy is Diagnosis. Diagnosis has a direct relation to Specimen and vice versa.

Creating a Patient

Open the **Accession Window** by clicking **Accession** on the **Dispatcher Window**.

The **Accession Window** is opened with the **Patient tab** forward. The cursor is positioned in the first field, **MedRecNo**. The MedRecNo is a unique WindoPath patient id and is what WindoPath uses to obtain history. Press **CTRL+L** to genereate a new, unique number for the patient. If the patient has a unique Medical Record Number across your entire system and you know it, you may enter that number and press **TAB** to move to the next field.

Populate all desired fields. The fields shaded in light blue (**MedRecNo, Name and Sex**) indicate **required fields**. The Patient record will remain incomplete until these fields have been populated.

Patient Tab Fields

- **MedRecNo (required field)** – the Patient's Medical Record Number which is **unique** for all Patients. You can type free text in this field or press **CTRL+L** for WindoPath to generate a random unique medical record number (patient id).

- **Name (required field)** – the Patient's name in the format *Lastname, Firstname*.

- **Age** – the Patient's current age. The age is calculated as the difference between the Patient's DOB and the case collection date or the visit admit date depending upon preferences. This is a *read-only* field and cannot be modified.

- **Sex (required field)** – the Patient's sex. Press **CTRL+L** to display entries from the hard-coded **Phrases Library, Sex Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **DOB** – the Patient's date of birth in the format *MM DD YYYY*.

- **SSN** – the Patient's Social Security Number. **WindoPath** automatically inserts dashes in the proper places.

- **Phone** – the Patient's telephone number.

- **Street** – the Patient's street address.

- **City** – the name of the city where the Patient lives. You can type free text in this field or press **CTRL+L** to display entries from the **Zip Codes Library.** To select a library entry, highlight it and click **Select** or press **ENTER**. Selecting a city from the Library automatically fills in the **Zip field** with the city's Zip code.

  You can limit the list to those Zip codes for a specific city by entering the Zip code or partial Zip code of the city and then pressing **CTRL+L**. Once a Zip code has been selected, the City, State and Zip code are all entered automatically.

- **State** – the state where the Patient lives.

- **ZIP** – the Zip code of the city where the Patient lives. You can type free text in this field or press **CTRL+L** to display entries from the **Zip Codes Library**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Cty (County) –** the county where the Patient lives.

- **Security Code** – the Patient's security code. Users can be restricted from viewing certain Patients by defining invalid security codes in the **User Library**.

- **Ethnicity** – the Patient's ethnicity as chosen from a pre-defined list.

- **Race –** the Patient's race as chosen from a pre-defined list.

- **Preferred Language –** the Patient's preferred language as chosen from a pre-defined list.

- **Species** – the Patient's species (for non-human subjects).

- **Preliminary Cause of Death –** the Patient's Preliminary Cause of Death.

- **Medicare** – the Patient's Medicare number.

- **Insured By** – the Patient's insurer. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library, Insured By Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Insurance Number** – the Patient's insurance number.

- **DOD** – the Patient's date of death for Autopsy Cases.

- **User Fields 1-3** – three User-defined fields that can be used to store information related to the Patient. To define a field, select **Specify User Fields** from the *Commands Menu.* Enter the desired name for one or more fields, then press **Done**.

Saving a Patient

When you have finished creating a new Patient, you can move directly to the **Visit tab**. The Patient is saved when you click the **Action button** to move to the Visit tab.

If you do not wish to create a Visit at this time, save the Patient by pressing **CTRL+S** or select **Save** from the *File Menu.* At the prompt **Really Save**, click **Yes** or press **ENTER**.

The Patient will appear in the **Patient List Box** at the bottom of the **Patient tab**.

After the Patient has been created, you can create a new Visit. Click the **Action button** which reads **Visit** or hit **Enter**. The User may also click on the **Visit tab** or navigate through the tabs by using the keyboard shortcuts (**CTRL+ Right** next tab or **CTRL+Left** previous tab). Refer to the section entitled **Creating a Visit**.

Looking Up a Patient

From the **Patient tab**, you can look up an existing Patient. You can look up by Medical Record Number or by Name.

Open the **Accession Window** by clicking **Accession** on the **Dispatcher Window**. The **Accession Window** is opened with the **Patient tab** forward.

Looking Up by Medical Record Number

Type the full Medical Record Number in the **MedRecNo field** and press **TAB**. If a Patient with the specified Medical Record Number exists, the data on that Patient will be filled in to the fields of the **Patient tab**. The Patient will appear in the **Patient List Box** at the bottom of the **Patient tab**. If no Patient with that Medical Record Number exists, the fields of the **Patient tab** will remain empty indicating that you should try a different number.

Looking Up by Partial Medical Record Number

Type the partial Medical Record Number in the **MedRecNo field** and press TAB. If any Patients exist whose Medical Record Number begins with the entered criteria, those Patients will appear in the **Patient List Box** at the bottom of the **Patient tab**. If no Patient with that partial Medical Record Number exists, the fields of the **Patient tab** will remain empty indicating that you should try a different number.

Looking Up by Name

Press **TAB** to move the cursor to the **Name field**.

Type the full or partial Patient name in the **Name field** in the format *Lastname, Firstname* and press **TAB**. All Patients matching the entered criteria will appear in the **Patient List Box** at the bottom of the **Patient tab**. Depending upon your Preferences, the first Patient matching the entered criteria may be highlighted in the list and that Patient's data may have populated the fields of the **Patient tab**. To select a Patient, highlight that Patient in the **Patient List Box** by clicking once on the entry.

When you look up an existing Patient, the **Accession Window** loads all Visits for that Patient.

Soundex Codes

When looking up a Patient from the database by Name, **WindoPath** searches based on the Patient's Soundex code. The Soundex code is comprised of the first two letters of the Patient's last name plus the remaining consonants in the name. For example, the Soundex code for JONES, JANE would be JONSJN. The Soundex code for JONES, JOAN would also be JONSJN. Using the Soundex code for name searches is useful for finding sound-alike Patients whose names might be misspelled.

Matching Patients

If other Patients in the database have similar information to the Patient you chose (social security number, dob, etc.), the **Matching Patients Window** opens automatically. Patients may be linked or merged from this window. Refer to *Chapter 12 – The Archives* for more information about Matching Patients.

Looking Up by Other Criteria

You can also look up Patients based on other criteria: Sex, DOB, SSN, Phone number (or partial phone number), Street address (or partial street address), ZIP code (or partial ZIP code), DOD, Security Code, Medicare Number, Insured By, User Fields 1-3 or by any combination of these criteria.

Select *Enter Match Criteria* from the *Patient Menu*. The fields of the **Patient tab** are cleared. Enter your search criteria in the appropriate fields. For example, to search for all female Patients born on January 1, 1967, enter F in the **Sex field** and 01 01 1967 in the **DOB field**. Press **CTRL+Y** or select **Find Matching Patients** from the *Patient Menu* to begin the search.

The message **This will take a long time. OK?** will be displayed. Click **Yes** or press **ENTER** to continue the search. Click **No** to cancel the operation. The duration of the search will vary based on the size of your database, system resources and the specified search criteria.

Exact Match Fields

Some fields require that you enter an exact match for the search criteria. These fields are: Sex, DOB, SSN, State and DOD.

Partial Match Fields

Some fields allow searching by partial match. These fields are: Phone, Street, City, ZIP, Security Code, Medicare Number, Insured By and User Fields 1-3.

To search by partial match, enter one or more characters in a field followed by the percentage sign (%). For example, to search for all Patients with a street address beginning with **123**, enter **123%** in the Street field.

Modifying a Patient

Once a Patient has been looked up using one of the methods described above, it can be modified. Position the cursor to the field to be modified and make the desired changes.

You can change the Medical Record Number to any *unused* Medical Record Number. If, however, you enter a number that is already used, the associated Patient for that Medical Record Number will be loaded and displayed in the **Patient tab**.

When you have finished modifying the Patient, save the changes by pressing **CTRL+S** or select **Save** from the *File Menu*. At the prompt **Really save**, click **Yes** or press **ENTER**. To exit the **Accession Window**, click **Done**.

If you do not press **CTRL+S** when moving to a different tab, the prompt **Save Changes** will be displayed. Click **Yes** or press **ENTER** to save your changes. Click **No** to discard any changes.

Deleting a Patient

Once a Patient has been looked up using one of the methods described above, it can be deleted. A Patient may only be deleted if it has no Visits.

With the **Patient tab** forward and the desired Patient highlighted in the **Patient List Box**, select *Delete Current Item* from the *Other Menu*. At the prompt **Are you sure**, click **Yes**. Click **No** to cancel the operation.

If the Patient has a Visit, the *Delete Current Item* menu will not be available for selection.

Creating a Visit

After the appropriate Patient has been created or looked up, you can create a new Visit. Click on the **Visit tab** to bring it forward or navigate through the tabs by using the keyboard shortcuts (**CTR+Right** next tab or **CTRL+Left** previous tab). If the **Action button** reads **Visit**, you can click the button or press **ENTER** to bring the **Visit tab** forward.

You cannot accession NEW Patients starting with the **Visit tab** because the Visit in this tab always applies to the Patient in the **Patient tab**. To accession a NEW Patient and Visit, first create the Patient and then create the Visit. Refer to the section entitled **Creating a Patient**.

If the selected Patient has existing Visits, all Visits will be listed in the **Visit List Box** at the bottom of the **Visit tab**. The most recent Visit will be highlighted in the list and its data will be displayed in the **Visit tab** fields. Press **CTRL+N** or select *New/Next* from the *File Menu* to clear the fields of the **Visit tab**. You can now create a new Visit as described below.

The **Visit tab** is opened with the cursor is positioned in the **Account field**. Users usually press **CTRL+L** to allow WindoPath to generate a unique account number. This number is used by WindoPath and must be unique throughout the entire database. If you have a system that generates unique numbers, you may enter the Patient's account number and press **TAB** to move to the next field. Populate all desired fields.

The field shaded in light blue (**Account**) indicates a **required field**. The Visit record is incomplete until this field has been populated.

Visit Tab Fields

- **Account (required field)** – the Patient's account or billing number. It must be **unique** for all Visits. You can type free text in this field or press **CTRL+L** (or select *Generate Account Number* from the *Visit Menu*) for **WindoPath** to generate a random unique account number.

- **Admit** – the Patient's admit date for the current Visit. This field is automatically filled in with today's date. To enter a different date, delete the current date and type free text in this field. You may also use **CTRL+L** to display the Date Selection Window.

- **Discharge** – the Patient's discharge date for the current Visit.

- **Age** – the Patient's age at the time of the Visit. The age is calculated as the difference between the Patient's DOB and the case collection date or the visit admit date depending upon preferences. Normally this is a *read-only* field and cannot be modified. However, if the DOB field is blank, the User will be able to populate the Patient's age. Click on the Visit Menu and select Set Age. Type their current age in the pop up box and click Ok. That age will populate the Age field. Although WindoPath does not know their DOB, it knows their age as of today. If the patient returns a year from now, the age at that time will be one year older.

- **Type** – the type designation for the Patient (for example, In Patient, Out Patient, etc.) You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library, Patient Type Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Location** – the location of the Patient for this Visit. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library,**

Location Box. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **AKA (Also Known As)** – alternate name for the Patient. When Patients are merged (as described in *Chapter 12 – The Archives*), the name of the deleted Patient is inserted automatically in this field. Free text entry is not accepted in this field.

- **Admitter**> – the Physician who admitted the Patient. The > sign before this field indicates that this entry must be made from the Library in one of the following ways:

  1. Display the complete **Physicians Library** by pressing **CTRL+L**. A double-paned window will open. The upper list box displays the complete **Physicians Library**. The lower list box displays each Physician Fax location specified for that Physician in Human Resources. (Refer to *Chapter 10 – Human Resources* for more information about the **Physician Fax Window**.) Physicians are listed in order by code. You can display the list in alphabetical order by name by right clicking on the Name column heading. To find a specific Physician by name, right click on the Name column heading and enter the name (or partial name) in the **Find Name: field**. Follow the instructions below for **Selecting an Admitter**.

     Selecting an Admitter:

     To select an Admitter ONLY, highlight the name in the upper list box and click **Select Physician**.

     To select an Admitter AND a specific Physician Fax location, highlight the name in the upper list box AND a location code in the lower list box. Click **Select Location**.

  2. Enter the full or partial name of the Physician and press **CTRL+L**. All Physicians matching the entered criteria will be listed. Follow the instructions above for **Selecting an Admitter**.

  3. Type the complete Physician code and press **CTRL+SHIFT+L**. If the Physician has only one Physician Fax location, the Submitter and location will be entered automatically. If the Physician has more than one Physician Fax location, a list of locations will be displayed. Follow the instructions above for **Selecting an Admitter**.

- **Consultor**> – an optional second Physician associated with the Visit. Consultor entry is performed in the same manner as Admitter entry described above.

- **Comment** – any comment that has been added to the Visit. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library, Comment Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Extra Field 1/Extra Field 2** – two User-defined fields that can be used to store information related to the Visit. If you wish to use these fields, notify your instructor of the descriptions you wish to use for these fields. You can type free text in these fields or press **CTRL+L** to display entries from the **Phrases Library, Extra One Box/Extra Two Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **User Fields 1-3** – three User-defined fields that can be used to store information related to the Visit. These are setup by clicking the Commands Menu and selecting the Specify User Fields option.

Saving a Visit

When you have finished creating a new Visit, you can move directly to the **Case tab**. The Patient, Visit and Case will be saved when the Case is saved.

If you do not wish to create a Case at this time, save the Visit by pressing **CTRL+S** or select **Save** from the *File Menu*. At the prompt **Really Save**, click **Yes** or press **ENTER**.

The Visit will appear in the **Visit List Box** at the bottom of the **Visit tab**.

After the Patient and Visit have been created, you can create a new Case. Click on the **Case tab** to bring it forward or navigate through the tabs by using the keyboard shortcuts. If the **Action button** reads **Case**, you can click the button or press **ENTER** to bring the **Case tab** forward. Refer to the section entitled **Creating a Case** in *Chapter 3 – Accessioning*.

Looking Up a Visit

From the **Visit tab**, you can look up an existing Visit. Visits are looked up by Account number.

Open the **Accession Window** by clicking **Accession** on the **Dispatcher Window**. The **Accession Window** is opened with the **Patient tab** forward. Click on the **Visit tab** to bring it forward.

Type the full account number in the **Account field** and press **TAB**. If a Visit with the specified account number exists, the data on that Visit will be filled in to the fields of the **Visit tab**. The Visit will appear in the **Visit List Box** at the bottom of the **Visit tab**. If the admit date of the Visit is today, the information in the **Visit List Box** will be highlighted in red. If no Visit with that account number exists, the fields of the **Visit tab** will remain empty indicating that you should try a different number.

When you look up an existing Visit, the **Accession Window** automatically loads the Patient for that Visit, the latest Case for that Visit, the first Specimen for that Case and the first Diagnosis for that Specimen. To view any of this data, click on the appropriate tab.

Modifying a Visit

Once a Visit has been looked up using the method described above, it can be modified. Position the cursor to the field to be modified and make the desired changes.

You can change the account number to any *unused* account number. If, however, you enter a number that is already used, the data associated with that Visit will be filled in to the **Visit tab** and the associated Patient for that Visit will be loaded and displayed in the **Patient tab**.

If all of the Cases on the selected Visit are at the stage Complete, no modifications to the Visit are allowed.

When you have finished modifying the Visit, save the changes by pressing **CTRL+S** or selecting **Save** from the *File Menu*. At the prompt **Really Save**, click **Yes** or press **ENTER**. To exit the **Accession Window**, click **Done**.

If you do not press **CTRL+S** when moving to a different tab, the prompt **Save Changes** will be displayed. Click **Yes** or press **ENTER** to save your changes. Click **No** to discard any changes.

Deleting a Visit

Once a Visit has been looked up, it can be deleted. A Visit can only be deleted if it has no Cases.

With the **Visit tab** forward and the desired Visit highlighted in the **Visit List Box**, select *Delete Current Item* from the *Other Menu*. At the prompt **Are you sure**, click **Yes**. Click **No** to cancel the operation.

If the Visit has a Case, the *Delete Current Item* menu item will not be available for selection.

Batch Entry of Patients and Visits

You might wish to enter new Patients and Visits in batches. Create the first Patient and Visit as instructed above. After saving the Visit, click on the **Patient tab** to bring it forward. The current Patient's data will be displayed. Press **CTRL+N** or select *New/Next* from the *File Menu* to clear the fields of the **Patient tab**. You can now create a new Patient and Visit as described in the sections above. To exit the **Accession Window**, click **Done**.

Accession Window Menus

Navigation Menu

Operation	Command	Description
Go To Top	**CTRL+ALT+G**	Moves cursor to the first field in the **Accession Window**
Go Down	**ALT+D**	Selects the next item down in the current list box
Go Up	**ALT+SHIFT+D**	Selects the next item up in the current list box
Previous Tab	**CTRL+Left**	Selects the tab to the left of the current tab
Next Tab	**CTRL+Right**	Selects the tab to the right of the current tab
Go to Gross…	**ALT+G**	Opens the **Quick Case Window** for the current Case with the Gross Tab brought forward
Show Tab Skips		Displays hidden tab skips

Hide Fields		Hides a set group of fields from each tab of the Accession window
Result Entry	**CTRL+R**	Opens the **Quick Case Window** for the current Case
Patient Tab	**CTRL+ALT+SHIFT+P**	Selects the Patient Tab

Patient Menu

Operation	Command	Description
Generate Code	**CTRL+L**	Automatically generates a Medical Record Number if the **Patient tab** is forward and the cursor is in the MedRecNo field
Enter Match Criteria		Clears the fields of the Patient to allow search criteria to be entered in one or more fields
Find Matching Patients	**CTRL+Y**	Looks up Patients from the database based on the entered criteria and loads all matching Patients in the **Patient List Box** at the bottom of the **Patient tab**
Load Visits from Database		Loads all of the current Patient's Visits from the database and displays them in the **Visit List Box** on the **Visit tab**
Show Links	**CTRL+ALT+ L**	Opens the **Links Window** displaying Patient records that are linked to the current Patient record
Show Matching Patients	**CTRL+ALT+ M**	If there are matching Patients, opens the **Matching Patients Window** displaying all Patients matching the criteria for linking or merging Patients
Unmerge…		Opens the **Unmerge Window** displaying a list of patients that have previously been merged with the current patient

Visit Menu

Operation	Command	Description
Generate Account Number	**CTRL+L**	Automatically generates an account number if the **Visit tab** is forward and the cursor is in the Account field

Load Cases From Database		Loads all of the current Visit's Cases from the database and displays them in the **Case List Box** on the **Case tab**
Set Age		Opens 'Enter Age' dialog to enter the age of the Patient
Billing…		Opens the **Billing Window** to enter billing and insurance information for the current Visit

Case Menu

Operation	Command	Description
Add Physician	**ALT+P**	Opens the **Physicians List Box** to add/delete Physicians to/from the current Case
Auto-assign Case Numbers		Toggle switch to select manual or auto-assignment of the Case number when a new Case is saved. Overrides the site wide preference to automatically assign case numbers
Auto-assign Locally		Selecting this menu item disables the Auto-assign Case Numbers menu item. When clicking **Save Case**, the Case number assigned will be the last Case number plus one. WindoPath does not look in the database for the next available Case number. This function allows two or more Users to accession blocks of Cases of the same Case type, each with their own number wheel. For example, User A can accession Cases S2008-000001 through S2008-000100, while User B accessions Cases S2008-000101 through S2008-000200. To return to standard auto-assign mode, click the Auto-Assign Case Numbers menu item
Choose Available Number	**ALT+SHIFT+A**	Opens a list of the next 100 available Case numbers, including numbers that have been skipped during accessioning
Correct Case Number		Opens a pop-up box to modify the Case letter

		prefix, year and/or accession number on a Case that has not yet been signed out
Enter Archive Cases	**ALT+A**	Enter past Cases into **WindoPath**
Enter Case Number		Moves cursor to the **Case Number Boxes** for entry of the number of the Case to be looked up from the database
Look Up Case	**ALT+L**	Looks up and displays the Case specified in the **Case Number Boxes**
Flag Special		Opens 'Special Flags for New Case' window allowing the user to select and modify a special flag
Sequence Number Prefix…		*Not used*
Case Clin. Info	**CTRL+.**	Opens the **Quick Case Window** for the current Case with the **C Info tab** forward
Case Comment		Opens the **Quick Case Window** for the current Case with the **C Com tab** forward
Note		Opens the **Quick Case Window** for the current Case with the **C Note tab** forward
Case Pre-Diagnosis		Opens 'Preliminary Diagnosis for New Case on Patient' window to enter Patient information
Sup. Rept		Opens the **Quick Case Window** for the current Case with the **Sup Rep tab** forward
Order Number		Opens a pop-up box displaying the Case's Requisition Number
Charges	**CTRL+=**	Opens the **Charge Selection Window** to create, view or modify charges on the current Case
Show Dates		Opens the **Dates Window** to display dates related to the current Case (Accession date, sign out date, etc.)
Procedures	**ALT+R**	Opens the **Procedures Window** listing all procedures on the selected Case
Specify Copies…		Opens the **Extra Copies Window** where you can specify the number of extra

		copies you would like to print for the current Case report. Type a number or use the **arrow buttons**. Click **OK** to accept the number entered. When the Case report is printed, each extra copy specified will be printed, labeled **Extra Copy**
Specify Sectors…	**CTRL+P**	Displays the **Prostate Sectors Window** showing all the sectors available to and assigned to the current prostate case
Fax/eMail on Sign Out		Toggle switch to flag this case to be faxed when signed out from the **Quick Case Window**
Set on Hold		Opens a pop-up box to specify a date and time until which to hold the Case's final report. Cases set on hold advance to *Needs Release* on sign out. To advance the status of the Case to *Needs Final Report*, highlight the Case in the **Case List** and press **CTRL+M**

Specimen Menu

Operation	Command	Description
Ad Hoc Reflex…	**ALT+X**	Displays the **Ad Hoc Reflex Test Window** to allowing assigning an ad hoc reflex test to the current specimen
Clin. Info	**CTRL+ALT+S**	Opens the **Quick Case Window** for the current Case with the **S Info tab** forward
Comment		Opens the **Quick Case Window** for the current Case with the **S Com tab** forward
ICD9 Codes		Opens the Quick Case Window for the current case with the ICD9 code tab forward
Renumber Specimen		Opens the **Specimen Renumbering Window** to assign a new number or letter designation to the current Case's Specimen(s)
Save and Print Labels…		

Slide Count		Opens window where the number of slides to be entered on the Specimen can be set
Procedures	**ALT+SHIFT+R**	Opens the **Procedures Window** listing all procedures on the selected Specimen

Other Menu

Operation	Command	Description
Delete Current Item		Deletes the currently highlighted item in the selected tab's list box
Orders…	**CTRL+SHIFT+O**	Opens the **Orders Window**, displaying available orders on which to create a Case (if Order Entry Interface is installed)
All Orders		Automatically processes all available orders (if Order Entry Interface is installed)

Display Menu

Operation	Command	Description
Admitter		Opens the **Physician Window** for the Admitter on the Visit
Collate By Group Physicians		Opens the Physicians Dialog, displaying a list of Physicians who will receive a copy of the Case report when printing Collated by Physician Group
Collate By Location Physicians		Opens the Physicians Dialog, displaying a list of Physicians who will receive a copy of the Case report when printing Collated by Physician Location
Faxable Physician Locations (as of now)		Displays all available fax locations
Consultor		Opens the **Physician Window** for the Consultor on the Visit
Group Physician	**CTRL+G**	Opens the **Physician Window** for the Submitter's Group Physician
Image Folder…		Opens the image folder
Original Report Folder…		Opens the original report folder

Output Locations…		Displays a list of all Physicians who will have a copy of this report distributed to them; if a printer is specified in the Physician Fax Location, that will also be listed
Pathologist		Opens the **Pathologist Window** for the Pathologist assigned to the Case
Patient		Opens the **Patient Window** for the current Patient
Physician Locator		Displays the **Physician Fax Window** for the Submitter. This is the location where the report will be printed/faxed/e-mailed when printing collated by Physician Group or Physician Location
Previous Signer		Opens the **Pathologist Window** for the Pathologist who signed the original Case, if the selected Case is a Corrected Case
Signer		Opens the **Pathologist Window** for the Pathologist who signed out the Case (if the Case is signed out)
Reviewer		Opens the **Pathologist Window** for the Pathologist who reviewed the Case (if the Case has been reviewed)
Submitter		Opens the **Physician Window** for the Submitter on the Case
Visit		Opens the **Visit Window** for the current Visit
Dates		Opens the **Dates Window** to display dates related to the current Case (Accession date, sign out date, etc.)
Patient Links		Opens the **Links Window** displaying Patient records that are linked to the current Patient record
Show SQL to audit whole case		Not used

Opening the Accession Window

The **Accession Window** can be opened in one of the following ways:

1. Click **Accession** on the **Dispatcher Window**. The **Accession Window** opens with the **Patient tab** forward and empty.

2. Click **Accession** on the **Case List Window**. The **Accession Window** opens with the **Case tab** forward displaying the Case highlighted in the **Case List**.

3. Select the **Quick Case Window** *Add/Delete Menu's Add Case* menu item. The **Accession Window** opens with the **Case tab** forward displaying the current Case from the **Quick Case Window**.

4. Select the **Quick Case Window** *Add/Delete Menu's Add Specimen* menu item. The **Accession Window** opens with the **Specimen tab** forward displaying the current Specimen from the **Quick Case Window**.

5. Select the **Quick Case Window** *Modify Menu's Enter Archive Cases* menu item. The **Accession Window** opens with the **Case tab** forward displaying the current Case from the **Quick Case Window** and with the *Case Menu's Enter Archive Cases* menu item selected.

6. Select the **Quick Case Window** *Modify Menu's Case* menu item. The **Accession Window** opens with the **Case tab** forward displaying the current Case from the **Quick Case Window**.

7. Select the **Quick Case Window** *Modify Menu's Specimen* menu item. The **Accession Window** opens with the **Specimen tab** forward displaying the current Specimen from the **Quick Case Window**.

8. Select the **Pap Case Window** *Other Menu's Accession Window* menu item. The **Accession Window** opens with the **Case tab** forward displaying the current Case from the **Pap Case Window**.

9. Click **Create Case** on the **Pathologist Window** in **Human Resources**. The **Accession Window** opens with the **Patient tab** forward and empty and the **Case tab** loaded with the selected Pathologist.

10. Click **Create Case** on the **Patient Window** in **Human Resources**. The **Accession Window** opens with the **Patient tab** forward displaying the selected Patient.

Billing Window

Select *Billing* from the **Accession Window** – *Visit Menu* to open the **Billing Window** (Figure 2).

Figure 2 – **Billing Window**

Billing Window Fields

- **Last** (**required field**) – last name of the Guarantor (person responsible for payment to the healthcare provider).

- **M** – the Guarantor's middle initial.

- **First** – the Guarantor's first name.

- **Address** – the Guarantor's street address.

- **City** – the city where the Guarantor lives.

- **Cty** – the county where the Guarantor lives.

- **State** – the state where the Guarantor lives.

- **ZIP** – the Zip code of the city where the Guarantor lives.

- **Phone** – the phone number of the Guarantor.

- **Name** – the Employer's name.

- **Code** – the Employer's code.

- **Address** – the Employer's street address.

- **City** – the city where the Employer is located.

- **Cty** – the county where the Employer is located.

- **State** – the state where the Employer is located.

- **Zip** – the Zip code of the city where the Employer is located.

- **Phone** – the phone number of the Employer.

- **Emergency Phone** – the emergency phone number of the Employer.

- **Marital Status** – the Patient's marital status.

- **Onset** – the date of the onset of the Patient's medical condition.

- **Misc1 /Misc2** – two User-defined fields that can be used to store information related to billing.

Billing Window List Box

- **Insurance** – lists all insurance carriers associated with the current Visit's billing. To add a new insurance carrier to the list, click **New**. To view the **Insurance Window** (Figure 3) for the highlighted insurance carrier, click **Open**. To delete the highlighted insurance carrier from the list, click **Delete**.

Billing Window Action Buttons

- **New** – opens a new **Insurance Window** for the current Visit

- **Open** – opens the **Insurance Window** (Figure 3) for the insurance carrier highlighted in the **Insurance List**.

- **Delete** – deletes the insurance carrier highlighted in the **Insurance List** from the current Visit.

- **Cancel** – closes the **Billing Window** without saving any changes.

- **Done** – closes the **Billing Window** saving any changes.

Insurance Window

Click **New**, **Open** or **CTRL+N** on the **Billing Window** to open the **Insurance Window** (Figure 3).

Figure 3 – **Insurance Window**

Insurance Window Fields

- **Carrier> (required field)** – the name of the insurance carrier for the current policy. Press **CTRL+L** to display entries from the **Yellow Pages**. To select a library entry, highlight it and click **Select** or press **ENTER**. You cannot type free text in this field.

- **Policy** – the policy number.

- **Group** – the insurance group.

- **Assign** – free text field.

- **From**: – the start date of the insurance policy in the format *MM DD YYYY*.

- **To**: – the end date of the insurance policy in the format *MM DD YYYY*.

- **Priority**: – this indicates the order of the insurances (primary, secondary, etc.)

- **Balance Type** – the insurance balance type.

- **Deductible**: – the deductible amount of the Patient's insurance.

- **Last** – the last name of the Subscriber (person holding the insurance policy).

- **M** – the Subscriber's middle initial.

- **First** – the Subscriber's first name.

- **Address** – the Subscriber's street address.

- **City** – the city where the Subscriber lives.
- **State** – the state where the Subscriber lives.
- **Zip** – the Zip code of the city where the Subscriber lives.
- **Relation** – the relationship of the Subscriber to the Patient.
- **DOB** – the Subscriber's date of birth in the format *MM DD YYYY*.
- **Sex** – the Subscriber's sex.
- **SSN** – the Subscriber's Social Security Number.
- **Phone** – the Subscriber's telephone.
- **Number** – the Employer Number of the Subscriber's employer.
- **Name** – the name of the Subscriber's employer.
- **Address** – the street address where the Subscriber's employer is located.
- **City** – the city where the Subscriber's employer is located.
- **State** – the state where the Subscriber's employer is located.
- **ZIP** – the Zip code of the city where the Subscriber's employer is located.
- **Phone** – the telephone number of the Subscriber's employer.

Insurance Window Action Buttons

- **Cancel** – closes the **Insurance Window** without saving any changes.
- **Done** – closes the **Insurance Window** saving any changes.

Chapter 3 – Accessioning

Accessioning Cases

All Cases are accessioned through the **Accession Window**.

Selecting the Case Type

The *Case Type Menu* to the right of the **Accession button** displays the last Case type accessioned on this PC by default. If you wish to accession Cases of a different type, click the **arrow button** to display the drop-down *Case Type Menu*. Click on the desired Case type to select it. The *Case Type Menu* will now display the type of Case that will be created when you open the **Accession Window**.

Accession Window

Open the **Accession Window** by clicking **Accession** on the **Dispatcher Window**. The **Accession Window** is opened with the **Patient tab** is forward.

For information regarding navigating the tabs, the **Action button** or the **Done button**, refer to the section entitled **Accession Window** in *Chapter 2 – Patients & Visits*.

Title Bar

The **Accession Window** title bar displays the selected Case type. This selected Case type is replaced by the Case number when the Case is saved.

Case Type Box

The **Case Type Box** in the lower left corner indicates the selected Case type. Click the **arrow button** to display the drop-down *Case Type Menu*. Click on the desired Case type to select it. When you change the Case type, the Case tab is cleared and the **Case Type Box** displays the proper Case type.

Case Number Boxes

The **Case Number Boxes** across the bottom of the window indicate the Case letter prefix, year and accession number of the current Case. These boxes are also used to enter new Case numbers or to correct existing Case numbers.

Creating a Case

In order to create a new Case, you must first have created the Patient and Visit records. Refer to *Chapter 2 – Patients & Visits* for instructions on creating or looking up Patients and Visits.

After the appropriate Patient and Visit have been created or looked up, you can create a new Case. Click on the **Case tab** to bring it forward or navigate through the tabs by using the keyboard shortcuts (**CTRL+right arrow** next tab or **CTRL+left arrow** previous tab). If the **Action button** reads **Case**, you can click the button or press **ENTER** to bring the **Case tab** forward.

If the Patient's selected Visit has existing Cases, all Cases will be listed in the **Case List Box** at the bottom of the **Case tab**. The most recent Case will be highlighted in the list and its data will be displayed in the **Case tab** fields. Press **CTRL+N** or select *New/Next* from the *File Menu* to clear the fields of the **Case tab**. You can now create a new Case as described below.

The **Case tab** is opened with the cursor positioned to the **Pathologist field**. Enter the Case Pathologist and press **TAB** to move to the next field. Repeat this process until all desired fields are filled in. The two fields shaded in light blue (Pathologist and Submitter) indicate **required fields**. The Case record is incomplete until these fields have been filled in.

Case Tab Fields

- **Pathologist> (required field)** – the Pathologist assigned to the Case. The > sign before this field indicates that this entry **must** be made from the Library in one of the following ways:

  1. Display the complete **Pathologist Library** by pressing **CTRL+L.** Pathologists are listed in order by code. You can display the list in alphabetical order by name by right clicking on the Name column heading. To find a specific Pathologist by code, enter the code in the **Find Code:** field. To find a specific Pathologist by name, right click on the Name column heading and enter the name (or partial name) in the **Find Name:** field. To select a Pathologist, highlight the name in the list and click **Select** or press **ENTER**.

  2. Enter the full or partial name of the Pathologist and press **CTRL+L** or **TAB**. All Pathologists matching the entered criteria will be listed. To select a Pathologist, highlight the name in the list and click **Select** or press **ENTER**.

  3. Type the pound sign (#) followed by the full or partial Pathologist code and press **CTRL+L** or **TAB**. The matching Pathologist name will be inserted in the **Pathologist field**. If there is more than one match, a list of matching Pathologists is displayed. To select a Pathologist, highlight the name in the list and click **Select** or press **ENTER**.

  4. Type the full or partial Pathologist code and press **SHIFT+CTRL+L**. The matching Pathologist name will be inserted in the **Pathologist field**. To select a Pathologist, highlight the name in the list and click **Select** or press **ENTER**.

- **Submitter> (required field)** – the Physician who submitted the Case. The > sign before this field indicates that this entry must be made from the Library in one of the following ways:

1. Display the complete **Physicians Library** by pressing **CTRL+L**. A double-paned window will open. The upper list box displays the complete **Physicians Library**. The lower list box displays each Physician Fax location specified for that Physician in Human Resources. (Refer to *Chapter 10 – Human Resources* for more information about the **Physician Fax Window**). Physicians are listed in order by code. You can display the list in alphabetical order by name by right clicking on the Name column heading. To find a specific Physician by name, right click on the Name column heading and enter the name (or partial name) in the **Find Name: field**. Follow the instructions below for Selecting a Submitter.

   Selecting a Submitter:

   To select a Submitter ONLY, highlight the name in the upper list box and click **Select Physician**.

   To select a Submitter AND a specific Physician Fax location, highlight the name in the upper list box AND a location code in the lower list box. Click **Select Location**.

2. Enter the full or partial name of the Physician and press **CTRL+L**. All Physicians matching the entered criteria will be listed. Follow the instructions above for **Selecting a Submitter**.

3. Type the pound sign (#) followed by the complete Physician code and press **CTRL+L**. If the Physician has only one Physician Fax location, the Submitter and location will be entered automatically. If the Physician has more than one Physician Fax location, a list of locations will be displayed. Follow the instructions above for **Selecting a Submitter**.

4. Type the complete Physician code and press **CTRL+SHIFT+L**. If the Physician has only one Physician Fax location, the Submitter and location will be entered automatically. If the Physician has more than one Physician Fax location, a list of locations will be displayed. Follow the instructions above for **Selecting a Submitter**.

- **Collected/Received** – the date the Case or Specimen was collected and received in the laboratory. These fields are automatically filled in with today's date. To enter a different date, delete the current date and type free text in these fields.

- **At** – the time the Case or Specimen was collected and received in the laboratory.

- **LstMP** – if the Patient is female, the date of the Patient's last menstrual period. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library, Last Period Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Retain Until** – optional date that can be used to flag Specimens for disposal after some period of time. Management reports can be generated to list those Cases for which Specimens can be discarded.

- **Fast.** – the fasting status of the patient. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library, Fasting Status Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **C. Status** – optional status related to the Case. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library, Status Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Tech** – the initials of the User accessioning the Case. This field is automatically filled in with the current user's initials. To change the selected Tech, you can type free text in this field or delete the automatic entry and press **CTRL+L** to display entries from the **User Library**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Ord#** – if the case is pulled in from an inbound orders interface, the **Order Number** will automatically populate this field.

- **Diener (Autopsy Cases Only)** – the name or initials of the person assisting the autopsy.

- **Death Date/At (Autopsy Cases Only)** – the date and time of the Patient's death.

- **Autop. Date/At (Autopsy Cases Only)** – the date and time of the autopsy.

- **User Fields 1-3** – three User-defined fields that can be used to store information related to the Case. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library, User Fields Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Clin Info** – patient Case Clinical Information. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library, Clinical Information Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

Case Number Assignment

When you have finished creating the new Case, you can now save the Case. You can either *manually assign* or *auto-assign* the Case number. The *Case Menu's **Auto-Assign Case Numbers*** and ***Auto-Assign Locally*** menu items indicate which preference has been selected. If there is a check mark next to either menu item, the Case number will be auto-assigned when the Case is saved. If there is no check mark, you will be prompted to manually assign the Case number. To change the preference, click on the menu item. NOTE: These items are toggle switches and are specific to the local PC.

Auto-Assigning Case Numbers (Site Wide)

When saving a Case, WindoPath searches the database for the highest Case number of the selected Case type and adds 1. For example, if the highest Surgical Case number is S2015-000100, the next number to be automatically assigned would be S2015-000101.

Auto-Assigning Case Numbers (Locally)

When saving a Case, WindoPath uses the last Case number assigned on this PC and adds 1. For example, if the last Case number assigned on this PC was S2015-000200, the next number to be automatically assigned would be S2015-000201, even if a higher Surgical Case number exists in the database. This option allows two or more Users to

accession batches of the same Case type simultaneously, each with their own number wheel.

Manually Assigning Case Numbers

When saving a Case, WindoPath will always prompt the User to enter a Case number.

Saving a Case

You can save a Case in one of three ways:

1. Click the **Action button**, which now reads **Save Case**.

2. Press **CTRL+S** and answer **Yes** to the **Really Save** prompt.

3. Select **Save** from the *File Menu* and answer **Yes** to the **Really Save** prompt.

If you have selected auto-assignment, the Case number will be automatically assigned. If you are manually assigning Case numbers, the cursor will move to the **Case Number Boxes** in the lower left corner of the **Accession Window**. Type the desired Case number, then save again using one of the methods listed above. The Case number will now be assigned. If the Case number has already been used, you will be notified with the message **Sorry Number Used**. Click **OK** and the cursor will move to the **Case Number Boxes** again so another number can be entered.

Saving the Case automatically saves the Patient and Visit.

When the Case has been saved, the temporary ID number in the **Accession Window's** title bar will be updated with the Case number.

The Case will appear in the **Case List Box** at the bottom of the **Case tab**.

You can now add Specimens to the Case. Click the **Action button**, which now reads **Specimen** or click on the **Specimen tab** to bring it forward. Refer to the section entitled **Adding Specimens**.

Entering Additional Case Information

Optionally, you can add the following information to a Case from the *Case Menu*. Selecting one of these menu items will open the **Quick Case Window** for the current Case with the appropriate tab forward.

- **Case Clin. Info** – you can type free text in this tab or press **CTRL+L** to display entries from the **Phrases Library, Clinical Information Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Case Comment** – you can type free text in this tab or press **CTRL+L** to display entries from the **Phrases Library, Comment Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Note** – you can type free text in this tab or press **CTRL+L** to display entries from the **Paragraphs Library**. To select a library entry, highlight it and click **Done** or press **ENTER**.

- **Case Pre-Diagnosis** – you can type free text in this tab or press **CTRL+L** to display entries from the **Paragraphs Library**. To select a library entry, highlight it and click **Done** or press **ENTER**.

- **Sup. Rep** – you can type free text in this tab or press **CTRL+L** to display entries from the **Paragraphs Library**. To select a library entry, highlight it and click **Done** or press **ENTER**.

Adding Physicians to a Case/Deleting Physicians from a Case

You cannot delete the Visit Admitter or Consultor or the Case Submitter from this window. You must delete these Physicians from the fields of the Visit tab or Case tab to remove them from the Case.

The **Physicians List Box** on the **Case tab** lists all additional Physicians associated with the Case. This does not include the Visit Admitter, Visit Consultor or the Case Submitter. To add or delete a Physician from the list, select *Add Physician* from the *Case Menu*. This opens a double list box. The upper list box displays all Physicians from the **Physicians Library**. All additional Physicians currently selected on the Case are listed in the lower list box. To ADD a Physician to the Case, click a name in the upper list box. To DELETE a Physician, click the name in the lower list box.

Physicians are listed in order by code. You can display the list in alphabetical order by name by right clicking on the Name column heading. To find a specific Physician by code, enter the code in the **Find Code:** field. To find a specific Physician by name, right click on the Name column heading and enter the name (or partial name) in the **Find Name:** field.

Click **Done** to accept your changes. Click **Cancel** to discard any changes. Click **New** to add a new Physician to the Library. Refer to *Chapter 10 – Human Resources* for instructions on creating a new Physician record.

Looking Up a Case

Users will usually retrieve a Case by selecting a Patient or a Visit, as described in *Chapter 2 – Patients & Visits*. However, they can also look up an existing Case from the **Case tab**. Cases are looked up by Case number.

Open the **Accession Window** by clicking **Accession** on the **Dispatcher Window**. Click on the **Case tab**. From the *Case Menu*, select *Enter Case Number*. The cursor will be positioned to the **Case Number Boxes** in the lower left corner of the **Accession Window**. Enter the Case letter prefix, year and accession number of the Case you wish to look up. From the *Case Menu*, select *Look Up Case* or press **ALT+L**.

If a Case with that number exists, the data on that Case will be filled in to the fields of the **Case tab**. The Case will appear in the **Case List Box** at the bottom of the **Case tab**. If no Case with that number exists, you will be notified with the message **No Such Case**. Click **OK** and the cursor will move to the **Case Number Boxes** again so another number can be entered.

When you look up an existing Case, the **Accession Window** automatically loads the Patient, Visit, Specimens and Diagnoses. To view any of this data, click on the appropriate tab.

Modifying a Case

Once a Case has been looked up using the method described above, it can be modified. Position the cursor to the field to be modified and make the desired changes.

If the Case has been signed out, it may only be modified by the Case Signer.

When you have finished modifying the Case, save the changes by pressing **CTRL+S** or by selecting **Save** from the *File Menu*. At the prompt **Really Save**, click **Yes** or press **ENTER**. To exit the **Accession Window**, click **Done**.

If you do not press **CTRL+S**, when moving to a different tab, the prompt **Save Changes** will be displayed. Click **Yes** or press **ENTER** to save your changes. Click **No** to discard any changes.

Deleting a Case

Once a Case has been looked up, it can be deleted.

With the **Case tab** forward and the desired Case highlighted in the **Case List Box**, select *Delete Current Item* from the *Other Menu*. At the prompt **Are You Sure**, click **Yes**. Click **No** to cancel the operation.

If the Case has been signed out and the current User is the Case signer, you will be able to unsign out the case and then make changes. If the current User is not the Case signer, you will not be able to unsign out the case or make any changes. If the Case is at *Needs Complete*, no User can delete the case.

Archive Cases

The Archive Cases feature enables you to view a full Patient history by entering Specimens and corresponding Diagnoses from Cases processed before **WindoPath** was implemented.

Entering Archive Cases

Open the **Accession Window** by clicking **Accession** on the **Dispatcher Window**.

To begin entering Archive Cases, click on the **Case tab** to bring it forward and select *Enter Archive Cases* from the *Case Menu* or press **ALT+A**. A check mark will appear in front of the menu item.

The **Case Type Box** in the lower left corner indicates the selected Case type. Click the **arrow button** to display the drop-down *Case Type Menu*. Click on the desired Case type to select it.

Create or look up the Patient as described in *Chapter 2 – Patients & Visits*. Continue to accessioning your Case as you normally would.

Saving Archive Cases

When saving an Archive Case, the Case number is **always** *manually assigned*.

You can save Archive Cases in one of the following ways:

1. Click the **Action button** which now reads **Save Archive**.

2. Press **CTRL+S** and answer **Yes** to the **Really Save** prompt.

3. Select **Save** from the *File Menu* and answer **Yes** to the **Really Save** prompt.

The cursor will move to the **Case Number Boxes** in the lower left corner of the **Accession Window**. Type the Case year and accession number then save again using one of the methods listed above. The Case number will now be assigned. If the Case number has already been used, you will be notified with the message **Sorry Number Used**. Click **OK** and the cursor will move to the **Case Number Boxes** again so another number can be entered.

The Case will appear in the **Case List Box** at the bottom of the **Case tab**.

Adding Specimens and Diagnoses to Archive Cases

You can now add Specimens to the Archive Case. Click the **Action button** which now reads **Specimen** or click on the **Specimen tab** to bring it forward. Refer to the section entitled **Adding Specimens**.

Once you have entered one Specimen on the Archive Case, you can add a Diagnosis. Click the **Action button** which now reads **Diagnosis** or click on the **Diagnosis tab** to bring it forward. Refer to the section entitled **Adding Diagnoses**.

Once you have entered the Diagnosis, the **Action button** will change to **Specimen**. The reason the Action does this is that if you have multiple Specimens and Diagnoses, you must add each pair together. For example, add the first Specimen and its corresponding Diagnosis; then add the second Specimen and its corresponding Diagnosis; and so forth. In this way, WindoPath is able to tie the correct Diagnosis with the correct Specimen.

Signing Out Archive Cases

Once each Specimen has at least one Diagnosis, you can sign out the Case. From the Specimen tab, the **Action button** will read **Case**. Click on the **Action button** or on the **Case tab**. The **Action button** now reads **Sign Out**. Click the button or press **ENTER**. The **Sign Out Date Window** opens. Use the scrolling arrows or type the correct sign out date for the Case. Click **Done**. The Archive Case is now at the *Needs Complete*.

NOTE: If an Archive Case is not signed out at the time of accessioning, the Case will appear in the current Case List at the status *Needs Signature*. The Case must then be signed out by a current Pathologist using the today's date.

Entering Multiple Archive Cases

If you wish to continue entering Archive Cases, click on the **Patient tab** to bring it forward. The current Patient's data will be displayed. To select a new Patient, press **CTRL+N** or select *New/Next* from the *File Menu*. You can now create a new Archive Case as described above. To exit the **Accession Window**, click **Done**.

Adding Specimens

Specimens can be added to new Cases during accessioning after the Case has been saved (refer to the section entitled **Saving a Case**). You can also look up an existing Case and add Specimens. Refer to the section entitled **Looking Up a Case**.

Click on the **Specimen tab** to bring it forward or navigate through the tabs by using the keyboard shortcuts.

If the selected Case has existing Specimens, all Specimens will be listed in the **Specimen List Box** at the bottom of the **Specimen tab**. The first Specimen will be highlighted in the list and its data will be displayed in the **Specimen tab fields**. Press **CTRL+N** or select *New/Next* from the *File Menu* to clear the fields of the **Specimen tab**. You can now create a new Specimen as described below.

The **Specimen tab** is opened with the cursor positioned to the **Source field**. Enter the Specimen Source and press **TAB** to move to the next field. Repeat this process until all desired fields are filled in. The field shaded in light blue (**Source**) indicates a **required field**. The Specimen record is incomplete until this field has been filled in.

Specimen Tab Fields

- **Source> (required field)** – the Specimen Source. The > sign before this field indicates that this entry **must** be made from the Library in one of the following ways:

  1. Display the complete **Source Library** by pressing **CTRL+L**. To select a Source, highlight it in the list and click **Select** or press **ENTER**. You can search for a specific Source by Site or Procedure using the drop-down menus or by typing text in the Code or Text fields.

  2. Enter the full or partial name of the Specimen site and press **CTRL+L**. All Sources with a Specimen site matching the entered criteria will be listed. To select a Source, highlight it in the list and click **Select** or press **ENTER**.

  3. Type the full or partial Source code and press **SHIFT+CTRL+L**. The matching Source name will be inserted in the **Source field**. If there is more than one match, a list of matching Sources is displayed. To select a Source, highlight it in the list and click **Select** or press **ENTER**.

- **Extra Text Box (source modifier)** – the unlabeled field immediately to the right of the **Source field**. This field is used to enter any additional information describing the Source. For example, left, right, anterior or posterior. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library, Extra Text Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Clin Info** – this represents the Specimen level clinical information. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library, Clinical Information Box**. To select a library entry, highlight it and click **Select** or press **ENTER**. This field can also be accessed from the *Specimen Menu's Clin Info* menu item. This is particularly useful to display large amounts of text.

- **Comment** – this represents the Specimen level comment. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library, Comment Box.** To select a library entry, highlight it and click **Select** or press **ENTER**. This field can also be accessed from the *Specimen Menu's Comment* menu item.

- **Tech** – optional field for the initials of the User who accessioned the case.

- **User Fields 1-3** – three User-defined fields that can be used to store information related to the Specimen. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library, User Fields Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Collected/Received** – the date the Specimen was collected and received in the laboratory. The Received Date is automatically filled in with today's date. To enter a different date, delete the current date and type free text in these fields.

- **At** – the time the Specimen was collected and received in the laboratory.

- **Misc Fields 1-3** – three miscellaneous fields that can be used to store information related to the Specimen.

Saving a Specimen

When you have finished creating a new Specimen, you can now save the Specimen. You can save the Specimen in one of three ways:

1. Click the **Action button** which now reads **Save Specimen**.

2. Press **CTRL+S** and answer **Yes** to the **Really Save** prompt.

3. Select **Save** from the *File Menu* and answer **Yes** to the **Really Save** prompt.

The Specimen will be assigned a number or letter, depending on your laboratory's preference. Refer to *Chapter 15 – Preferences* for more information. The Specimen will appear in the **Specimen List Box** at the bottom of the **Specimen tab**.

If the selected Specimen Source has default profiles assigned to it in the **Source Definition Library**, the message **Assigning x Profiles** will be displayed. These profiles can be viewed/edited from the **Procedure List Window**.

If the selected Specimen Source has default charges assigned to it in the **Source Definition Library**, the appropriate charges will be applied to the Specimen. These charges can be viewed/edited from the **Charge Selection Window**.

If you wish to continue creating new Specimens, press **CTRL+N** or select *New/Next* from the *File Menu* to clear the fields of the **Specimen tab**. You can now create new Specimens as described in the section above. To exit the **Accession Window**, click **Done**.

Optional Accession Window Functions

After creating Specimens, you can choose one or more of the following options:

If you wish, you can now order or print specimen container **labels**. Click on the **Labels tab** to bring it forward or navigate through the tabs by using the keyboard shortcuts **CTRL+Right** to move to the next tab or **CTRL+Left** to move to the previous tab. If the **Action button** reads **Labels**, you can click the button or press **ENTER** to bring the **Labels tab** forward. Refer to the section entitled **Printing Labels**.

If you wish to enter **results** immediately on the current Case, select the *Navigation Menu's Result Entry* menu item or press **CTRL+R** to open the **Quick Case Window** for the current Case. The **Quick Case Window** is described in *Chapter 4 – Current Cases, Grossing and Result Entry*.

If you wish to order **procedures** on the current Specimen, select the *Specimen Menu's Procedures* item to open the **Procedure List Window** or press **ALT+SHIFT+R**. The **Procedure List Window** is described in *Chapter 5 – Case Procedures & Profiles*.

If you wish to order **charges** on the current Case or Specimen, click on the Case tab to bring it forward and select the *Case Menu's Charges* item. This opens the **Charge Selection Window**. The **Charge Selection Window** is described in *Chapter 6 – Diagnostic Result Entry & Sign Out.* Charges can also be ordered from the **Quick Case Window**.

Looking Up a Specimen

To view a particular Specimen on a Case, you must first look up the Case. Refer to the section entitled **Looking Up a Case**.

Click on the **Specimen tab** to bring it forward or navigate through the tabs by using the keyboard shortcuts **CTRL+Right** to move to the next tab or **CTRL+Left** to move to the previous tab.

All of the selected Case's Specimens will be listed in the **Specimen List Box** at the bottom of the **Specimen tab**. The first Specimen will be highlighted in the **Specimen List Box** and its data will be displayed in the **Specimen tab** fields. To select a different Specimen, highlight that Specimen in the list by clicking on it (or use the *Navigation Menu's Go Down* or *Go Up* menu items; or press **ALT+D** to Go Down to the next Specimen in the list; or press **ALT+SHIFT+D** to Go Up to the previous Specimen in the list).

Modifying a Specimen

Once a Specimen has been looked up using the method described above, it can be modified. Position the cursor in the field to be modified and make the desired changes.

To change the Source on a Specimen, delete the Source from the **Source field.** Press **CTRL+L** to open the **Source Definition Library** and select a new Source. When saving the Specimen, if the previous Source had default Profiles specified in the **Source Definition Library**, the prompt **Delete Existing Blocks** will be displayed. Respond **Yes** to delete the existing profiles and replace them with any default profiles associated with the new Source. Respond **No** to keep the existing profiles.

When you have finished modifying the Specimen, save the changes by pressing **CTRL+S** or selecting **Save** from the *File Menu*. At the prompt **Really Save**, click **Yes** or press **ENTER**. To exit the **Accession Window**, click **Done**.

If you do not press **CTRL+S**, when moving to a different tab, the prompt **Save Changes** will be displayed. Click **Yes** or press **ENTER** to save your changes. Click **No** to discard any changes.

Deleting a Specimen

Once a Specimen has been looked up, it can be deleted.

With the **Specimen tab** forward and the desired Specimen highlighted in the **Specimen List Box**, select *Delete Current Item* from the *Other Menu*. At the prompt **Are You Sure**, click **Yes**. Click **No** to cancel the operation.

If the Case has been signed out and the current User is the Case signer, you will be able to unsign out the case and then make changes. If the current User is not the Case signer, you will not be able to unsign out the case or make any changes. If the Case is at *Needs Complete*, no User can delete the specimen.

Renumbering a Specimen

Although new Specimens are automatically assigned a number or letter when saved, you can choose to renumber one or more Specimens on a Case. This is especially useful after deleting a Specimen.

With the **Specimen tab** forward, highlight the Specimen you wish to renumber in the **Specimen List Box**. Select the *Specimen Menu's **Renumber Specimen*** item to open the **Specimen Renumbering Window** shown in Figure 1.
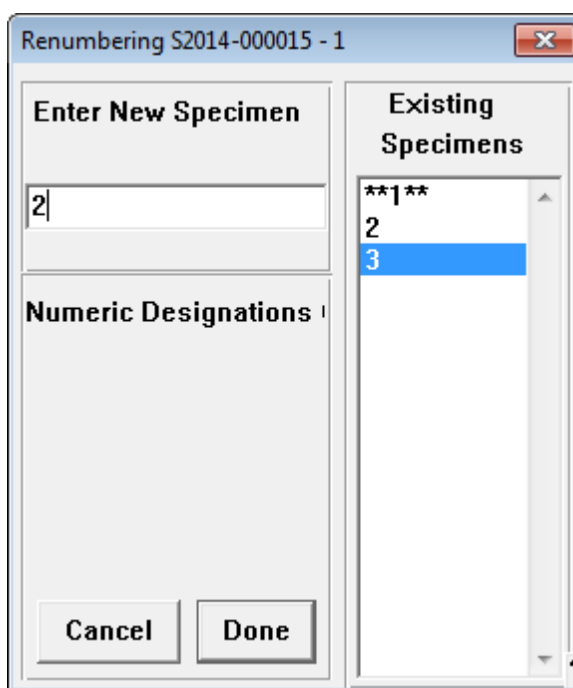
Figure 1 – **Specimen Renumbering Window**

The **Existing Specimens List** on the right displays all of the current Case's Specimens. The selected Specimen is flagged with stars (**). The **Enter New Specimen field** displays the logical number or letter. To accept this designation, click **Done**. You can also type free text. You cannot use a number or letter that appears in the **Existing Specimens List**. Click **Cancel** to cancel the operation.

The **Specimen List Box** on the **Specimen tab** now displays each Specimen with its new number or letter designation.

To save your changes, click the **Action button** which now reads **Save Specimen**.

Specimen Container/Requisition Labels

The **Labels tab**, shown in Figure 2, allows you to print specimen container or requisition labels.
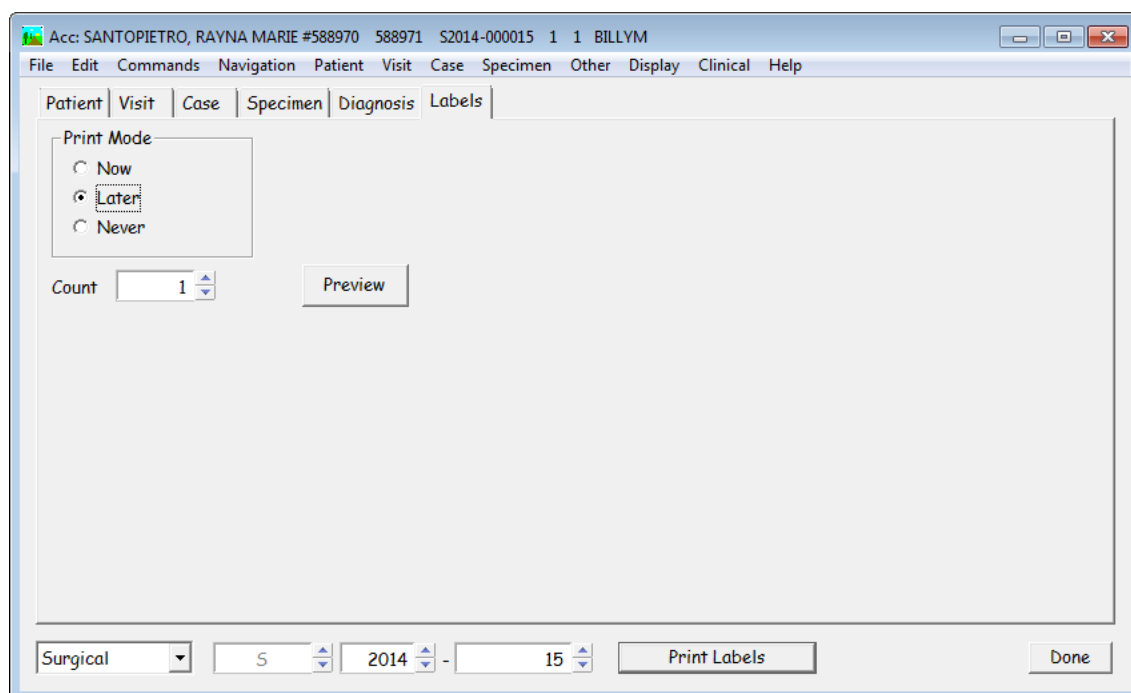
Figure 2 – Labels Tab

Click on the **Labels tab** to bring it forward or navigate through the tabs by using the keyboard shortcuts (**CTRL+Right** next tab or **CTRL+Left** previous tab). If the **Action button** reads **Labels**, you can click the button or press **ENTER** to bring the **Labels tab** forward.

Label Print Modes

There are three Print Mode options on the **Labels tab**: **Now**, **Later** and **Never**. Select the desired option by clicking the **radio button** to its left. The selected print mode option remains in effect until a different option is selected.

- If you select **Now**, labels will print immediately.

- If you select **Later**, labels will be stored for batch printing through the Labels feature on the Dispatcher Window.

- If you select **Never**, the **Labels tab** will never be selected via the **Action button**.

Label Count

The **Count field** on the **Labels tab** indicates the number of labels to print. The default is one per Specimen plus one label for the requisition. You can change this number by typing a new number or use the **arrow buttons** to select the desired number of labels. For Pap Cases, the default number of labels is specified in the **Preferences List Window** – *Site Wide Menu* – *Default Pap Slide Count* menu item.

Print Previewing Labels

To see a preview of how the labels will appear when printed, click **Preview**. The **Label Start** prompt opens. Enter the row and column where the first label should

print or enter the starting label number. Click **Done**. The **Print Preview Window** opens.

Printing Labels

To print labels, click the **Action button** which now reads **Print Labels** or press **ENTER**. The **Label Start** prompt opens. Enter the row and column where the first label should print or enter the starting label number. Click **Done**.

If you are printing labels **Now**, the standard print window will open. Verify the selected printer and click **OK**. The labels will print to the selected printer.

If you are printing labels **Later**, refer to the section entitled **Batch Printing Labels** below.

Label content is defined in the Specimen Label Report in the **Formatter**. Refer to *Chapter 13 – The Formatter* for more information.

Batch Printing Labels

To print a batch of labels, click **Labels** on the **Dispatcher Window**. The **Labels Window** opens (Figure 3).
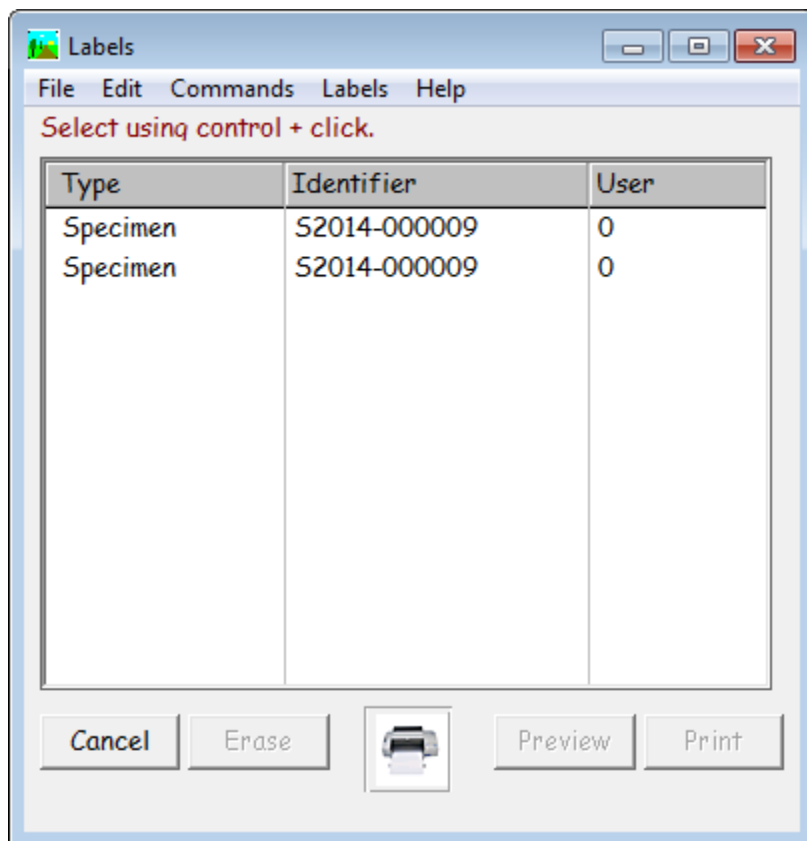
Figure 3 – **Labels Window**

The window lists the type of label, the Case number and the User who ordered the label for each label to be printed. To delete labels, click on them in the list and click **Erase**.

To see a preview of how the labels will appear when printed, select *Print Preview* from the *Labels Menu* or click **Preview**. The **Label Start** prompt opens. Enter the row and column where the first label should print or enter the starting label number. Click **Done**. The **Print Preview Window** opens.

To print the labels, click **Print**. If there is more than one Specimen Label Report defined in the Formatter, a drop-down menu of label report formats is displayed. Click on the desired format and click **Done**. The **Label Start** prompt opens. Enter the row and column where the first label should print or enter the starting label number. Click **Done**. The standard print window will open. Verify the selected printer and click **OK**. The labels will print to the selected printer.

After printing, you will be prompted with the message **Erase Selected Labels**. Click **Yes** to delete the labels. Click **No** to save the labels for reprinting later.

To exit the **Labels Window**, click **Cancel**.

Reprinting Labels
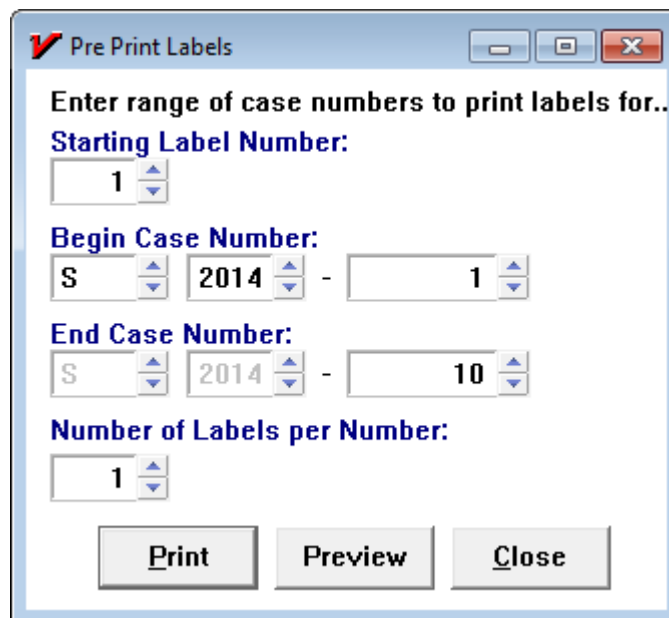
You can reprint labels at any time. First, look up the Case as described in *Chapter 3 – Accessioning*. Click on the **Labels tab** to bring it forward. Enter the desired number of labels in the **Count field** and click **Print Labels**.

To reprint labels using Batch Printing, refer to the previous section, **Batch Printing Labels**.

Pre-Printed Labels

You can print specimen container or requisition labels for Cases before they are accessioned into **WindoPath**.

From the **Labels Window** – *Labels Menu*, select *Pre Print Labels*. The **Pre Print Labels Window** opens (Figure 4).

Figure 4 – **Pre Print Labels Window**

Pre Print Labels Window Fields

- **Starting Label Number** – by default, label 1 is selected. If you are reusing a sheet of partially used label stock and wish to start printing at a different label number, enter the number in the field.

- **Begin Case Number** – the first number of the Case number range to be printed. Enter the Case letter prefix, year and accession number.

- **End Case Number** – the last number of the Case number range to be printed. Enter the Case letter prefix, year and accession number. The Case letter prefix and year must be the same as the Start Case Number.

- **Number of Labels Per Number** – the number of labels to print for each Case in the Case Number range. The default number is 1. You can change this number by typing a new number in the field or use the scrolling **arrow buttons** to select the desired number of labels.

To see a preview of how the labels will appear when printed, select *Print Preview* from the *Labels Menu* or click **Preview**. If there is more than one Specimen Label Report defined in the Formatter, a drop-down menu of label report formats is displayed. Click on the desired format and click **Done**. The **Label Start** prompt opens. Enter the row and column where the first label should print or enter the starting label number. Click **Done**. The **Print Preview Window** opens.

To print the labels, click **Print**. If there is more than one Specimen Label Report defined in the Formatter, a drop-down menu of label report formats is displayed. Click on the desired format and click **Done**. The **Label Start** prompt opens. Enter the row and column where the first label should print or enter the starting label number. Click **Done**. The standard **Print Window** will open. Verify the selected printer and click **OK**. The labels will print to the selected printer.

Label content is defined in the Specimen Label Report in the **Formatter**. Refer to *Chapter 13 – The Formatter* for more information.

Adding Diagnoses

The **Diagnosis tab** allows Diagnoses to be specified on Archive Cases. You can enter Diagnoses for current Cases from this window but this is usually done from the **Quick Case Window**. Refer to *Chapter 6 – Diagnostic Result Entry & Sign Out*.

To create a Diagnosis, you must first create or look up a Specimen. Refer to the sections entitled **Adding Specimens** or **Looking Up a Specimen**.

Verify that the desired Specimen is highlighted in the **Specimen List Box** and displayed in the **Specimen tab**. Click on the **Diagnosis tab** to bring it forward or navigate through the tabs by using the keyboard shortcuts (**CTRL+Right** next tab or **CTRL+Left** previous tab).

If the selected Case has existing Diagnoses, all Diagnoses will be listed in the **Diagnosis List Box** at the bottom of the **Diagnosis tab**. The first Diagnosis will be highlighted in the **Diagnosis List Box** and its data will be displayed in the **Diagnosis text editing box** at the top of the tab. Press **CTRL+N** or select *New/Next* from the *File Menu* to clear the **Diagnosis text editing box**. You can now create new Diagnoses as described below.

The **Diagnosis tab** consists of two sections: the **Diagnosis text editing box** at the top of the tab and the **Diagnosis List Box** at the bottom of the tab. **The Diagnosis text editing box** is where new Diagnoses are created and where the full text of existing

Diagnoses is displayed. The **Diagnosis List Box** displays the first line of text for all Diagnoses on the selected Specimen.

To create a new Diagnosis, type free text in the **text editing box** or press **CTRL+L** to display the **Diagnosis List Window**. This window lists all Diagnoses associated with the Specimen source in the **Source Library**. This window also lists all Diagnoses that have been defined in the **Diagnosis Library** as **Applies to All Sources**. This allows you to create a single non-site specific Diagnosis (such as *carcinoma)* and have it listed for all Specimen types.

Partial searches on the Diagnosis code can be performed by typing the full or partial Diagnosis code then pressing **CTRL+SHIFT+L**. The **Diagnosis List Window** then displays only the Diagnoses matching the specified criteria.

The **Diagnosis List Window** lists Diagnoses in the format *CODE: diagnosis text* in the top half of the window. The bottom half of the window displays the complete text of all the Diagnoses you have selected from the list. Select a Diagnosis by clicking on it in the list and clicking **Select**. Multiple Diagnoses can be strung together by double clicking each Diagnosis in the list in the order in which you want them to appear. To enter the selected Diagnoses in the **Diagnosis tab**, click **Done**.

Saving a Diagnosis

When you have finished creating the new Diagnosis, save the data by pressing **CTRL+S** or select **Save** from the *File Menu*. At the prompt **Really Save**, click **Yes** or press **ENTER**.

The Diagnosis will appear in the **Diagnosis List Box** at the bottom of the **Diagnosis tab**.

If you do not press **CTRL+S** when moving to a different tab, the prompt **Save Changes** will be displayed. Click **Yes** or press **ENTER** to save your changes. Click **No** to discard any changes.

Entering Multiple Diagnoses

If you wish to continue creating new Diagnoses for the **current** Specimen, press **CTRL+N** or select *New/Next* from the *File Menu* to clear the **Diagnosis text editing box**. You can now create a new Diagnosis as described in the section above.

If you wish to create Diagnoses on a **different** Specimen, click on the **Specimen tab** to bring it forward or navigate through the tabs. The first Specimen on the Case will be highlighted in the **Specimen List Box** and its data will be displayed in the fields of the **Specimen tab**. To select a different Specimen, highlight that Specimen in the **Specimen List Box** by clicking on it (or use the *Navigation Menu's Go Down* or *Go Up* menu items or press **ALT+D** to Go Down to the next Specimen in the list or press **ALT+SHIFT+D** to Go Up to the previous Specimen in the list). Refer to the section entitled **Adding Diagnoses**.

Looking Up a Diagnosis

From the **Diagnosis tab**, you can look up an existing Diagnosis. To look up a Diagnosis, you must first look up its Specimen. Refer to the section entitled **Looking Up a Specimen**.

Verify that the desired Specimen is displayed in the **Specimen tab**. Click on the **Diagnosis tab** to bring it forward or navigate through the tabs.

If the selected Specimen has existing Diagnoses, all Diagnoses will be listed in the **Diagnosis List Box** at the bottom of the **Diagnosis tab**. The first Diagnosis will be highlighted in the **Diagnosis List Box** and its data will be displayed in the **Diagnosis text editing box** at the top of the tab. To select a different Diagnosis, highlight that Diagnosis in the list by clicking on it or use the *Navigation Menu's Go Down* or *Go Up* menu items. You can also press **ALT+D** to go down to the next Diagnosis in the list or press **ALT+SHIFT+D** to go up to the previous Diagnosis in the list. The full text of the selected Diagnosis is displayed in the **Diagnosis text editing box**.

Modifying a Diagnosis

Once a Diagnosis has been looked up using the method described above, it can be modified. Make the desired changes to the text displayed in the **Diagnosis text editing box**.

When you have finished modifying the Diagnosis, save the changes by pressing **CTRL+S** or selecting **Save** from the *File Menu*. At the prompt **Really Save**, click **Yes** or press **ENTER**. To exit the **Accession Window**, click **Done**.

Deleting a Diagnosis

Once a Diagnosis has been looked up, it can be deleted.

With the **Diagnosis tab** forward and the desired Diagnosis highlighted in the **Diagnosis List Box**, select *Delete Current Item* from the *Other Menu*. At the prompt **Are You Sure**, click **Yes**. Click **No** to cancel the operation.

If the Case has been signed out and the current User is the Case signer, you will be able to unsign out the case and then make changes. If the current User is not the Case signer, you will not be able to unsign out the case or make any changes. If the Case is at *Needs Complete*, no User can delete the diagnosis.

Order Entry

If an Order Entry Interface has been installed, Cases can be accessioned by selecting a predefined Order specifying Patient, Visit, Case and Specimen data.

Select *Orders* from the **Accession Window** – *Other Menu* (or press **CTRL+SHIFT+O**) to open the **Orders Window** (Figure 5).

Figure 5 – **Orders Window**

Orders Window Columns

- **Req#** – the Case's Requisition Number.

- **MedRec** – the Patient's Medical Record Number.

- **Name** – the Patient's name in the format of *lastname, firstname*.

- **Acct** – the Visit Account Number.

- **Site/Procedure(s)** – the Specimen Site and Procedure.

- **Rec'd** – the Case received date.

- **Collect.** – the Case collection date.

- **Submitter** – the submitting Physician.

- **Case** – the Case number.

- **Type** – the Case type.

- **Ord Date** – the date the order was placed.

- **Ord Time** – the time the order was placed.

- **Transit** – not used.

- **Pathologist** – the assigned Pathologist.

- **Diagnosis** – the Diagnosis.

- **DOB** – Patient date of birth.

- **SSN** – Patient social security number.

Orders Window Fields

- **Find Req#:** – the **Find: field** enables you to quickly select an Order based on entered criteria. You can search based on any column in the **Orders Window**. The default is Requisition Number. To search by another column, right click on the appropriate column heading. For example, to search for Patients with names beginning with **G**, right-click in the Name column heading and type **G** in the **Find: field**. The first (lowest alphabetically) Patient beginning with **G** will be highlighted in the list.

- **MedRec:** – displays the Medical Record Number of the selected order. To change the MedRec number for this order, type the new number in the **MedRec: field** and press **TAB**. The MedRec number changes for the selected order.

Orders Window Action Buttons

- **Days Ago** – opens a date selection box where a number of days back may be specified. The **Orders Window** will display all Orders placed within the specified date range.

- **Delete** – deletes the highlighted Order.

- **Open** – displays all Open Orders.

- **All** – displays all Open and Ordered Orders.

- **Flag In** – not used.

- **Cancel** – closes the **Orders Window**.

- **Select** – populates the **Accession Window** tabs with the data specified in the highlighted Order.

Accessioning Cases From Orders

The **Orders Window** displays all available Orders. Highlight the desired Order in the list box. Click **Select**. The **Accession Window** Patient, Visit, Case and Specimen tabs will be populated with the appropriate data as specified in the selected Order. The **Action button** now reads **Save Case**. If any of the required fields in any tab are empty, the **Action button** will display the name of that tab. After each required field on each tab has been filled in, the **Action button** reads **Save Case**.

Select the desired Case type from the drop-down menu in the lower left corner if it is not correct. Click **Save Case**. If the case type is set to auto populate the case number, the next available Case Number will be entered and the **Action button** will change to **Specimen**.

If the case type is not set to auto populate the case number, select the desired Case type from the drop-down menu in the lower left corner if it is not correct. Click in the case number box in the lower left corner of the window next to the **Action button**. Enter the appropriate Case Number and click **Save Case**. The **Action button** will change to **Specimen**.

If any existing Cases have the same Case Number as the Case you are saving, the following message will be displayed: **Sorry Number Used; Illegal Case Number**. Click Ok. Assign a different Case Number and click **Save Case**.

The **Action button** changes to **Specimen**. Continue to the Specimen tab to add comments, source modifiers or clinical information. If no changes are being made, the User can continue to the Labels tab. If changes are made, the User must click the **Save Specimen Action button** before leaving this tab.

If labels are going to be printed at this point, click on the Labels tab. Print the necessary labels. The window will automatically return to the Patient tab after printing allowing the User to accession another Case.

If no labels are needed, you may continue to the Patient tab by clicking the **Action button** which is now labeled **Patient**.

Chapter 4 – Current Cases, Grossing and Result Entry

Current Cases

This chapter describes the **Case List Window** and the **Quick Case Window**.

The **Case List Window** is where Users filter and sort to find their Current Cases. Click the **Current Cases button** on the **Dispatcher Window** to open the **Case List Window**.

The **Quick Case Window** is where Cases are resulted. This includes Grossing, Diagnosing, attaching Images and Documents and adding Consults and Add-ons.

Case List Window

The **Case List Window** allows each User to filter and sort the current Cases to find those Cases which are of concern to the User.

There is a large drop-down menu field just above the count on the top, right side of the window. This is the Find field. In the screen caption below (Figure 1), it is labeled Needs because the Needs checkbox is checked. When you click any of the checkboxes on this window, the focus of the Find field is transferred to that box. The drop-down menu will then display all of the available choices for that checkbox.

Clicking any of these checkboxes and selecting an option from the Find Field allows the User to limit or filter the **Case List Window** by that type of data. Any combination of filters can be used to limit the **Case List Window**.

WindoPath's unique tracking feature allows the User to select Cases at specific steps in the processing. These are referred to as *Needs*. After a Case has been accessioned and Specimens have been entered, the Case now needs the gross description. This status is displayed as *Needs Gross* in the **Case List Window**.

Figure 1 – **Case List Window**

Case List Window Columns

- **Case** – the Case number.

- **Name** – the Patient's name in the format of *lastname, firstname.*

- **Needs** – the current *Need* of the Case (Gross, Diagnosis, Signature, etc.)

- **Specimen Site(s)** – all Sources on the Case.

- **Profiles** – profiles assigned to the case.

- **Rec'd Date** – the received date of the Case.

- **Medrec** – the Patient's Medical Record Number.

- **DOB** – the Patient's date of birth.

- **SO Date** – the date the Case was signed out.

- **Sequence** – not used.

- **Status** – any text entered in the **Accession Window, Case Tab**, **C. Status** field.

- **Submitter** – the Case's submitting physician.

- **SSN** – the Patient's Social Security Number.

- **Loc** – the Visit location.

- **Account** – the Visit Account number.

- **Flag** – displays Special Flags on the Case.

- **Rep Date** – the date the Case's final report was printed.

- **Rep Time** – the time the Case's final report was printed.

- **Group** – the code of the submitting Physician's group, if any; if there is no group, the Submitter code is displayed.

- **Lab** – if the preference to use Site Security is enabled, this column will display the Lab designation.

- **Transit** – not used.

- **Col**. **Date** – the Case collection date.

- **Visit U2** – the Extra Visit #2 field in the **Visit Tab** of the **Accession Window**.

- **Hours** – the number of hours since the Case was created.

- **Stat** – STAT flag (priority) displays as **True** or **False**.

You can sort each column on the **Case List Window** in ascending or descending order. To sort in ascending order, right click on the column name. To sort in descending order, hold down the **SHIFT** key and right click on the column name.

Case List Window Action Buttons

- **Open** – opens the **Quick Case Window** for the currently highlighted Case. From this window, you can enter results on the current Case or view Case information. The **Quick Case Window** is described later in this chapter.

- **Accession** – opens the **Accession Window** for the currently highlighted Case. From this window, you can enter a new Case for the current Patient or create new Patients, Visits or Cases. The **Accession Window** is described in *Chapter 3 – Accessioning*.

- **History** – opens the **History Window** for the currently highlighted Patient. The **History Window** lists the first line of all the Diagnoses that have been entered on the Patient. The **History Window** is described in *Chapter 10 – Human Resources*.

- **Refresh** – refreshes the window with the current filter settings.

- **Procedures** – opens the **Procedure List Window**. From this window you can order additional histology slides and panels, view worklists and print labels. The **Procedure List Window** is described in *Chapter 5 – Case Procedures & Profiles.*

- **Hierarchy** – opens the **Hierarchy Window** shown in Figure 4. This window displays a complete list of all selected Cases, their Patients, *Needs* status, any Specimens and Diagnoses that have been entered. The **Hierarchy Window** is described later in this chapter. Please refer to the section titled **Hierarchy Window.**

- **Done** – closes the **Case List Window** and returns to the **Dispatcher Window**.

- **Reset All** – removes all filters from the **Case List** and returns to the complete list of current Cases.

- **Reset** – removes the last filter applied to the **Case List**.

- **Sort>** – sorts the **Case List** in ascending order based on the label of the **Find: field**.

- **Sort<** – sorts the **Case List** in descending order based on the label of the **Find: field**.

Case List Window Menus

Case List Menu

- *Add-ons* – **ALT+A** – opens the **Add-On List Window** for the first Specimen on the selected Case.

- *Advance Selected Cases* (**CTRL+M**) – advances the *Needs* for the currently highlighted Cases. Only the following *Needs* can be manually advanced:

  - *Needs Gross* to *Needs Gross Entry.*

  - *Needs Microscopic* to *Needs Micro Entry.*

  - *Needs Partial to Needs Clinical Results.*

  - *Needs Release* to *Needs Final Report.*

  - *Needs Final Report* to *Needs Distribution.*

  - *Needs Final Report* to *Needs Complete.*

  - *Needs Distribution* to *Needs Complete.*

- **Cancel/Uncancel Selected Cases –** cancel/Uncancel case. A User may cancel a case at any **Needs Status** other than **Needs Complete.** The User may not **Cancel** a Completed Case. To **Cancel a Case**, highlight the case in the **Case List Window** and select **Cancel/Uncancel Selected Cases** from the **Case List Menu**. A prompt will appear asking to confirm the cancel. Click **Yes.** A window will appear **Enter the Reason for Removal.** Log the reason and then click **Done.** This will be saved in the database's audit trail. The case's status will then change to **Cancelled.** To **Uncancel a Case**, highlight the case in the **Case List Window** and select **Cancel/Uncancel Selected Cases** from the **Case List Menu**. The case's status will then no longer be **Cancelled.**

  *Note: The **Case Number of a Cancelled Case** may never be re-used for another case.

  *Note: WindoPath will deactivate all cases with a status of **Cancelled** every night.

- *Complete Procedures* – advances all procedures on all selected Cases to their final processing step.

- *Delete Selected Cases* – deletes the highlighted Cases. A User may delete any case that has not already been **Signed Out**. The User may not **Delete** a Signed Out Case. To **Delete a Case**, highlight the case in the **Case List Window** and select **Delete Selected Cases** from the **Case List Menu**. A confirmation prompt will appear **Really Delete This Case**, click **Yes.** The case will be deleted.

If the case has already been signed out, a prompt will appear **Case Signed. Cannot Delete**. Click **OK** to the prompt and a second prompt will appear **Remove This Case from history**. See below for more information on **Removing a Case from History**.

*Note: The **Case Number of a Deleted Case** may be reused on a new or different case in the future.

- *Flag Selected Cases Special* – opens the Special Flag Dialog. Selecting a special flag from the drop-down menu sets the flag on all selected Cases. The User may assign multiple flags for each case.

- *Unflag Selected Cases Special* – removes all special flags on selected cases.

- *My Cases (CTRL+SHIFT+M)* – loads only those cases assigned to the pathologist associated with the User.

- *Preview Labels* – opens the label preview window for the currently highlighted case.

- *Print Labels* – opens the print dialogue to print labels from the currently highlighted case.

- *Remove from History* – removes the currently highlighted case from the patient's record. A User may remove any **Signed Out** or **Completed** case from a patient's history. To **Remove a Case from History**, highlight the case in the **Case List Window** and select **Remove from History** from the **Case List Menu**. A confirmation prompt will appear **Really Remove this Case from history**. Click **Yes**. A window will appear **Enter the Reason for Removal**. Log the reason and then click **Done**. The case will be removed from the patient's history and WindoPath will append an 'e' to the case number. Ex: S2014-0000143e.

*Note: The **Original Case Number** of a Case Removed from a Patient's history may be reused on a new or different case in the future.

- *Unremove from History* – for any Case that has been removed from history ('e' appended to the Case number), removes the 'e' flag and brings the case back into the history of the patient.

- *Set On Hold* – opens a pop-up box to specify a date and time until which to hold the Case's final report. Cases set on hold advance to *Needs Release* on sign-out. To advance the status of the Case to *Needs Final Report*, highlight the Case in the **Case List** and press **CTRL+M**.

- *Sign Out Selected Cases* – opens the **Pathologist Signature Window**. By default, the Pathologist assigned to the current User's User account is highlighted. To select a different signer, highlight the appropriate name in the list. Enter the electronic signature password of the Pathologist signing out the Cases and click **Done**. The message **All cases needing signature and all Pap cases needing diagnosis or signature will be signed. Proceed** is displayed. Click **Yes** to sign out the selected Cases. Click **No** to cancel the operation. Any Pap Cases at the status *Needs Diagnosis* will be assigned the default 'Negative' diagnosis.

- *Set Retain Blocks Until* – opens a Date Entry Dialog where a Retain Until date can be set on all selected Cases.

- *Set Technical Charge Location* – opens the **Locations Lookup Window** to allow assigning a location from the **Yellow Pages Library** to one or more cases currently highlighted in the Case List Window.

- *Verify Selected Cases* – for any Case flagged as malformed (*Needs* followed by a question mark), describes why the Case is malformed. Example: **Signed But No Sign Out Date**. You can verify the entire list or selected Cases only.

- *Go To Top* – **ALT+T** – highlights the first Case in the **Case List**.

- *Go To Bottom* – **ALT+SHIFT+T** – highlights the last Case in the **Case List**.

- *Procedures* – **ALT+R** – opens the Procedure List Window.

Worklist Menu

- *Case List* – prints a copy of the current Case List. You can print the entire list or selected Cases only. The Case List prints: Case Number, Patient Name, Case Needs, Received Date, Medrec#, Date of Birth, Sign Out Date and Specimen Site.

- *Daily Log(s)* – opens the Date Time Dialog where a date range can be entered. The log lists all Cases in the **Case List** that have been received on each day within the date range. The Daily Log prints: Case Number, Specimen Site, Patient Name, Submitter and Case Needs.

- *Pap Worksheets...* – prints a **Pap Worksheet** for each highlighted Pap Case in the current **Case List**. You may print Pap worksheets for all Cases in the Case List or for selected Cases only. These worksheets contain Case data already entered and have space to fill in the rest. Past and current Cases are listed on the worksheet.

- *Preview Case List* – opens the **Print Preview Window** showing a preview of the Case List.

- *Preview Daily Log* – opens a window where a date range can be entered. The **Print Preview Window** opens, showing a preview of the Daily Log. The log lists all Cases in the **Case List** that have been accessioned on each day within the date range.

- *Preview Pap Worksheet* – opens the **Print Preview Window** showing a preview of the Pap worksheet for each highlighted Pap Case in the current **Case List**.

Reset Menu

- *Load Case+* – **CTRL+K** – when User Preference 24, **Allow bar code scan of case number,** is set to **True**, select **Load Case+** to prompt for case number entry and the entry box is displayed as a single text entry field into which a number can be scanned from a bar code.

- *Load Case* – **CTRL+K** – moves the cursor to the **Find: field**.

- *Reload Selected Case* – activates Case components for selected cases so that they appear on the Case List.

- *Update Selected Cases* – **CTRL+=** – updates the **Case List**, based on its current filters, with any new data that matches the filter criteria. For example, if the **Case List** is filtered to *Needs Signature*, selecting this menu item will update the **Case List** with any Cases that have advanced to *Needs Signature* since the **Case List** was originally filtered.

- *Update All from Database* – **F2** – refreshes the **Case List Window** from the database.

Case Report Menu

The *Case Report Menu* is used to print or fax Case reports. Although reports can be printed at any time, they are usually printed after the Case has been signed out. Therefore, the *Case Report Menu* is described in *Chapter 6 – Diagnostic Result Entry & Sign Out*.

Misc Menu

- *Resave Original Reports* – if the site wide preference **Save original reports** is set to **True**, a new PDF file for each selected Case will be saved in the Original Reports directory, replacing any existing files for the selected Case.

- *Resend Accession Message* – resends a confirmation message for the highlighted Case to the HIS interface.

- *Result Report* - if a Result Report interface has been installed, submits the selected Cases to the Result Report interface. This menu option is available on completed Cases only.

- *Save JPEGs of Selected Cases* – saves a jpg file for each selected Case in the Original Reports directory.

- *Charges Only* – toggle switch to print only the Charges by Specimen section for each Case highlighted in the **Case List**. Select this menu item to place a check mark next to it. When this menu item is toggled on, printing using any of the print options under the **Case Report Menu** will print a report for each selected Case, listing only the charges for each Case.

- *History Only* – toggle switch to print only the Related Cases section for each Case highlighted in the **Case List**. Select this menu item to place a check mark next to it. When this menu item is toggled on, printing using any of the print options under the **Case Report Menu** will print a report for each selected Case, listing only the history for each Patient.

- *Supplemental Only* – toggle switch to print only the Signed Supplemental section for each Case highlighted in the **Case List**. Select this menu item to place a check mark next to it. When this menu item is toggled on, printing using any of the print options under the *Case Report Menu* will print a report for each selected Case, listing only the Signed Supplemental report(s) for each Case.

- *Particular Profile Only* – when this is selected, a dialog appears allowing the user to choose a Profile by description. The next time a report is run, the clinical history sections will display only procedures that are part of the selected profile. This allows the user to limit clinical history to only procedures for a particular profile.

- *Assign Charges* – opens the Charge Selection Window.

- *Rack and Slot* – opens an info box displaying the current case's rack and slot ID.

- *Rack History* – opens the Rack History Window for the currently selected case. This window displays all of the previous Specimen, Profile and Procedure racks where this case has resided.

- *Show Clinical History* – opens the Clinical Info Module's **Clinical View Window**. For use with external clinical results from an interface.

- *Basic Needs Only* – **CTRL+SHIFT+B** – filters the **Case List** to include only Cases without pending Procedures or Consults.

- *Show Drop Down* – **SHIFT+END** – loads the **Find: field** drop-down menu with all available selections for the current check box.

- *Close Drop Down* – **SHIFT+HOME** – closes the **Find: field** drop-down menu.

Filter Menu

- *Add-on Pathologist Code* – loads the **Find: field** with a list of codes of Pathologists assigned to Add-Ons. Click on the desired Pathologist code to filter the **Case List** to include only those Cases that have one or more Add-Ons assigned to that Pathologist.

- *Add-on Pathologist Name* – loads the **Find: field** with a list of names of Pathologists assigned to Add-Ons. Click on the desired Pathologist name to filter the **Case List** to include only those Cases that have one or more Add-Ons assigned to that Pathologist.

- *Amended* – filters the **Case List** to include only those Cases that have at least one add-on that is a Supplemental Report.

- *For Magic Printer* – not used.

- *Completed in the Last 24 Hours* – filters case list window to display only cases that have been completed in the last 24 hours.

- *Dictations* – filters the case list window to display only cases that have dictations assigned to them.

- *Lab Code* – when using Lab Definition Site Security, this item filters the case list window to display only cases assigned to a particular lab code.

- *Lab Name* – when using Lab Definition Site Security, this item filters the case list window to display only cases assigned to a particular lab name.

- *Group Physician Code* – loads the **Find: field** with a list of Codes of Group Physicians assigned to Cases. Click on the desired Physician code to filter the **Case List** to include only those Cases assigned to that Group Physician.

- *Group Physician Name* – loads the **Find: field** with a list of Names of Group Physicians assigned to Cases. Click on the desired Physician name to filter the **Case List** to include only those Cases assigned to that Group Physician.

- *In Lab* – filters the Case List Window to display only those cases marked as **in lab**. Not used.

- *Needs Add-on Sign Out* – filters the **Case List** to include only those Cases with Specimens that have at least one pending (unsigned) Add-On items.

- *Not Completed Recently* – filters the **Case List** to include only those Cases that have been signed out but not completed within a specified number of hours. This number is determined in the **Case Types Library,** Overdue Hours field.

- *Not Signed Recently* – filters the **Case List** to include only those Cases that have been diagnosed but not signed out within a specified number of hours.

This number is determined in the **Case Types Library,** Overdue Hours field.

- *Overdue* – filters the **Case List** to include only Cases that are Overdue. A case is considered Overdue if it has exceeded the number of days set in the Overdue field of the **Case Type Library** without being completed.

- *Payment Due* **–** filters the **Case List Window** to display only those cases with a Payment Due.

- *Partial Clinical Results* **–** filters the **Case List Window** to display only those cases with Partial Clinical Results entered.

- *Pre-dictations* **–** filters the **Case List Window** to display only cases that have pre-dictations assigned to them

- *Procedure Overdue* **–** filters the **Case List** to include only Cases that are at *Needs Procedures* and have procedures marked as overdue.

- *Prostate Cases* **–** filters the Case List by cases whose specimen site(s) are Prostate Sources. May include both Prostate and Surgical case types.

- *Recently Signed Add-ons* – filters the **Case List** to include only those Cases with Specimens that have had one or more Add-On items signed out but not yet printed.

- *Signed 20 Minutes or More Ago* **–** filters the Case List to display only those cases who have been Signed out for 20 minutes or more ago.

- *Transit Status* – filters the Case List Window by Transit Status.

- *With Add-ons* – filters the **Case List** to include only those Cases with Specimens that have one or more Add-On items added. These Add-Ons may be pending or completed (signed).

- *With Clinical Specimens* – filters the **Case List** to include only those Cases on Patients that have one or more clinical results in the database. This filter may take a long time to complete and should not be performed on a large number of Cases.

- *With Consults* **–** filters the **Case List** to include only those Cases that have one or more Consults added. These Consults may be pending or completed.

- *With Documents* **–** filters the **Case List** to include only those Cases that have one or more Documents added.

- *With Images* **–** filters the **Case List** to include only those Cases that have one or more Images added.

- *With Original Report* – filters the **Case List** to include only those Cases that have an original report file (jpg, bmp or pdf) saved in the Original Reports Directory.

- *With Results Sent* **–** displays all cases that have had results sent across the results interface.

- *With Tables* – filters the **Case List** to include only those Cases that have one or more Tables added (Specimen or Diagnosis).

- *With Digital Scans* – filters the **Case List** to include only those Cases that have one or more **Digital Scans** associated with them.

Select Menu

- *Batch Change* – opens the **Batch Case Change Window** to allow changing the Pathologist, Submitter, Case Status, Tech (accessioner), Case Type, sign out location, lab or grosser on multiple Cases. This is useful if Cases are accessioned under an **Unknown** Pathologist or Submitter, then assigned to the appropriate doctor at a later time.

  Highlight each Case to be changed in the Case List. Select *Batch Change* to open the **Batch Case Change Window**.

  To change the Pathologist on each Case, press **CTRL+L** in the **Pathologist field** to display entries from the **Pathologist Library** and select the desired Pathologist. Click **Apply** to change the Pathologist on each Case.

  To change the Submitter on each Case, press **CTRL+L** in the Submitter field to display entries from the **Physicians Library** and select the desired Physician. Click **Apply** to change the Physician on each Case.

  To change the Case status text on each Case, type the desired text in the **C. Status field**. Click **Apply** to change the Case status text on each Case.

  To change the tech on each Case, press **CTRL+L** in the **Tech field** to display entries from the **User Library** and select the desired User. Click **Apply** to change the tech on each Case.

  To change the Case Type on each Case, click the drop-down list of Case Types and select the desired Case Type. Click **Apply** to change the Case Type on each Case.

  To change the sign out location on each Case, click the drop-down list of sign out locations and select the desired sign out location. Click **Apply** to change the Case Type on each Case.

  To change the grosser on all Specimens on each Case, click **Grosser** to display entries from the **User Library**. Select the desired User and click **Done**. Click **Apply** to change the grosser on each Specimen.

- *Batch Charge* – opens the **Batch Charge Window** to allow adding charges to multiple Cases/Specimens.

  Highlight each Case to have charges added in the Case List. Select *Batch Charge* to open the **Batch Charge Window**.

  By default, the **Assign to Case check box** is selected. If you wish to apply charges to Specimens, click the **Assign to first specimen check box**.

  The list box displays entries from the **Charges Library**. Click on one or more charges and click **Done**. The selected charges will be added to the selected Cases or Specimens.

- *Batch ICD* – opens the **Batch ICD Window** to allow adding ICD Codes to multiple Cases and/or the first specimen on the case.

  Highlight each Case to have ICD Codes added in the Case List. Select *Batch ICD* to open the **Batch ICD Window**.

  By default, the **Assign to Case check box** is selected. If you wish to apply ICD Codes to the first specimen on the case, click the **Assign to first specimen check box**.

The list box displays entries from the **ICD Library**. Click on one or more ICD Codes and click **Done**. The selected ICD Codes will be added to the selected Cases or Specimens.

- *By Combination* – opens the **Select Special Window** to allow filtering the **Case List** by multiple criteria. Refer to the section entitled **Filtering the Case List** for more information.

- *Case Numbers* – opens the **Select Case Numbers Window**, allowing the user to either scan or type a case number into the find field or allowing the user to manually select a case listed in the list box.

- *Switch Patient* – opens the **Switch Patient Window**, allowing the User to move Visits and all their Cases to a different Patient. Only Users with *Manager* privileges may switch a Case to a different Patient. *This menu item is available only if the Case is still modifiable.*

  Highlight each Case to be switched in the Case List. Select *Switch Patient* to open the **Switch Patient Window**.

  In the top list box, select all Visits to be switched to another Patient.

  In the **Medrec field**, enter the Medical Record Number of the new Patient and press **TAB**. Alternately, you can enter the name of the new Patient in the **Name field** and press **TAB**.

  In the bottom list box, select the new Patient. Click **Switch** to complete the Visit and Case move to the new Patient.

- *Switch Visit* – prompts the User to move the selected Case to a different Visit. Responding **Yes** will prompt the User to enter a Visit account number. (The Case may be switched to a Visit belonging to the same Patient or to a different Patient). If a valid account number is entered, the User is prompted to confirm moving the case to the new Visit (and/or Patient, if the account number belongs to a different Patient). Responding **Yes** completes the Case move to the new Visit (and/or Patient). *This menu item is available only if the Case is still modifiable and the User has **Switch Visit** privileges.*

Display Menu

The Display Menu is described in *Chapter 2 – Patients & Visits.*

Fields Menu

- *Save Field Settings* – after dragging and dropping the columns in the list window in the desired User-defined order, select this menu item. Respond **Yes** to the **Save Field Attributes** prompt to save the User-defined field settings (column order).

- *Restore Field Settings* – if the columns in the list window have been rearranged temporarily, select this menu item to restore the User-defined field settings. Respond **Yes** to the **Restore Saved Field Attributes** prompt to restore the User-defined field settings.

- *Reset Fields* – restores the window's default field settings.

Case List Window Needs

- **Specimen** – the Case has no Specimen.

- **Gross** – the Case has one or more Specimens that do not have a gross description entered. If a gross description has been entered, but contains underscores that have not been filled in, the Case will remain at Needs Gross until all underscores have been filled in.

- **Gross Entry** – the Case has one or more Specimens that have had gross descriptions dictated, but not yet entered. Cases are flagged for Gross Entry by clicking the **Dictated button** on the **Quick Case Window** with the Gross tab selected. This enters the Dictated flag (Đ) in the Gross tab.

- **Procedures** – the Case has one or more Specimens with one or more pending procedures in the **Procedure List Window**. Procedures are considered pending until they have been advanced to their final Status (Finished or Complete).

- **Approval –** A case at **Needs Approval** has to be flagged as **Approved** before it can go to **Needs Signature**. To approve a case, from the Quick Case Window, select **Flag Approved** from the **Modify** Menu. The Reserved Preference O511, **Require flagging cases approved prior to signing**, must be set to **True**.

- **Add-On** – the Case has one or more Specimens with one or more pending Add-On items. Add-Ons are considered pending until they have been signed out.

- **Canceled –** A case at **Needs Canceled** has been canceled using the **Cancel/Uncancel Selected Cases** option on the Case List menu. The user is allowed to cancel a case regardless of the stage of the case except for cases at Needs Complete. A canceled case can no longer be modified. The next time database maintenance is run, all canceled cases are flagged as inactive. A canceled case can be pulled from the database and examined. It can also be uncanceled. If uncanceled, it reverts to its status prior to being canceled. This feature allow users to abort work on a particular case without deleting it from the database, thus preserving for historical purposes the work that was done on the case. The case number of a canceled case may not be reused.

- **Microscopic** – the Case has one or more Specimens that do not have a microscopic description entered. If a microscopic description has been entered, but contains underscores that have not been filled in, the Case will remain at Needs Microscopic until all underscores have been filled in.

- **Microscopic Entry** – the Case has one or more Specimens that have had microscopic descriptions dictated, but not yet entered. Cases are flagged for Microscopic Entry by clicking the **Dictated button** on the **Quick Case Window** with the Micro tab selected. This enters the Dictated flag (Đ) in the Micro tab.

- **Diagnosis Record** – the Case has one or more Specimens that do not have a Diagnosis record. A Diagnosis record is added by selecting *Add Diagnosis* from the **Quick Case Window** – *Add/Delete Menu*.

- **Diagnosis** – the Case has one or more Specimens with Diagnosis records, but no Diagnosis text entered.

- **Correction** – the Case is a Corrected (Amended) Case and is at Needs Signature.

- **Signature** – all Specimens have all the required elements (Gross, Micro, Diagnosis) as per your preferences and is ready to be signed out.

- **Rescreen** – (Pap Cases Only) – the Case has a Normal categorization, it was signed out by a Cytotech and was then flagged for Rescreen. The Case must be signed out by a second Cytotech or a Pathologist. This Need will also appear if the patient had a previous abnormal and the appropriate preferences are set.

- **Ab Rescreen** – (Pap Cases Only) – the Case has an Abnormal categorization. The Case has been flagged out by a Cytotech and has been flagged for Rescreen. The Case must be signed out by a second Cytotech or a Pathologist.

- **Review** – the Case has been signed out by a Cytotech or a Pathologist and has been flagged for Review. The Case must be signed out by a second Pathologist.

- **Release** – the Case has been set **On Hold** by entering a date in the **Set on Hold** menu item (**Accession Window**, **Quick Case Window** or **Case List Window**). The Case has been signed out, but is being held from advancing to *Needs Final Report*. To advance the Case to *Needs Final Report*, highlight the Case in the **Case List** and press **CTRL+M** (Case List Menu, Advance Selected Cases).

- **Final Report** – the Case has been signed out but has not yet had a Final Report printed.

- **Distribution** – the Case has been signed and has had a Final Report printed. In order to use this Need you must set Site Wide Preference S66, **Flag Distributed Automatically**, to **False**. The Case will have to be manually advanced to Complete. Reserved Preference O153, **Allow Modification of Cases at Needs Distribution**, will allow you to make changes prior to advancing the case to Complete.

- **Consult** – the Case has at least one pending Consult. Consults are considered pending until a Date Returned has been entered.

- **Complete** – the Case has been signed and had a Final Report printed. If using the Distribution step, Case Needs have been manually advanced from Distribution to Complete.

- **Reprint** – the Case is Complete but has at least one Add-On that has been signed out since the Final Report was printed. Additionally, Reprint will display if the Case is Complete but has at least one clinical result that has been added and completed since the Final Report was printed.

- **Clinical Results** – the Case has at least one pending clinical procedure (procedures with an associated clinical code in the **Procedures Library**). Clinical results are considered pending until a result has been entered in the **Procedure Result Window** and the procedure status has been advanced to the last step. The Reserved Preference O294, **Use Needs Clinical Results**, must be set to **True**.

- **Malformed** – the Case needs Verification. Select the case, click the *Case List Menu – Verify Selected Cases* to display the reason the Case has been flagged as malformed.

- **Partial Report –** the Submitter must have the **Send Partial Results** box checked in the Physician library. Once all of the procedures in a given profile have been completed, the case will go to Needs Partial Report. If

there are other profiles that are not complete, after printing, the case will advance to Needs Clinical Results. Once the last profile has been completed, the case will go to Needs Final Report.

- **ICD –** a Case at **Needs ICD Code** is a Surgical or Pap case that has been signed out, but not yet reported/completed. The Reserved Preference O439, **Require ICD codes for sign out of Surgical and Cytology cases**, must be set to **True**. When set to **True**, the Case will only advance to **Needs Final Report** after at least one ICD Code has been added to the case. To enable for all case types, Reserved Preference O678 must also be set to **True**.

- **Special –** the Reserved Preference O166, **Use Needs Special**, must be set to **True**. When set to **True**, cases that have been diagnosed but also have a special flag added (Quick Case Window - Modify Menu - Special Flags) will advance to **Needs Special** instead of **Needs Signature**. This feature is used to prevent certain cases from being signed out. Cases will only advance to **Needs Signature** after the special flag is removed. When set to **False**, cases advance to **Needs Signature** after being diagnosed.

Case List Window *Needs* Symbols

© – the Case has at least one pending Consult. Consults are considered pending until a Date Returned has been entered.

° – the Case has at least one pending Add-On. Add-Ons are considered pending until they have been signed out.

• – the Case is Complete but has at least one Add-On that has been signed out since the Final Report was printed. Additionally, Reprint will display if the Case is Complete but has at least one clinical result that has been added and completed since the Final Report was printed.

▔▔▔▏ – the Case has at least one pending procedures in the **Procedure List Window**. Procedures are considered pending until they have been advanced to their final Status (Finished or Complete).

? – the Case needs Verification (is flagged as Malformed). Select the case, click the *Case List Menu – Verify Selected Cases* to display the reason the Case has been flagged as malformed.

Blue or Lime Green – the Case has a Special Flag. The Special Flag text is displayed in the Flag column of the **Case List.**

Fuchsia – the case is Overdue. A case is considered Overdue if it has exceeded the number of days set in the Overdue field of the **Case Type Library** without being completed.

Hunter Green – the Case is either a Clinical Case or it has at least one Clinical Procedure.

Filtering the Case List

The Case List can be filtered by any of the check boxes on the window or by any combination of check boxes. For example, you might want to filter the list to display Cases at Needs Signature assigned to a particular Pathologist.

Filtering the Case List by Case Needs

Click the **Needs check box**. The **Find: field** is now labeled **Needs** and displays a list of Case *Needs* available in the current **Case List**. Click the *Need* you want to select it. Once a *Need* has been selected, the **Case List** only displays Cases with that *Needs* status.

Filtering the Case List by Case Type

Click the **Case Type check box**. The **Find: field** is now labeled **Case Type** and displays a list of Case *types* available in the current **Case List**. Click the Case type you want to select it. Once a Case type has been selected, the **Case List** only displays Cases with that Case type.

Filtering the Case List by Case Number

Click the **Case # check box**. The **Find: field** is now labeled **Case #** and displays a list of Case numbers available in the current **Case List**. Click the Case number you want to select it. You may also type the full or partial Case number in the **Find: field**. Once a Case number has been selected, the **Case List** only displays only that Case.

Other Case List Filters

The Case List can also be filtered by the following criteria by clicking on the appropriate check box:

- **Pat ID** – the Patient Medical Record Number.
- **Pat Name** – the Patient name.
- **Path ID** – the code of the Pathologist assigned to the Case.
- **Path Name** – the name of the Pathologist assigned to the Case.
- **Rev ID** – the code of the Pathologist who reviewed the Case.
- **Rev Name** – the name of the Pathologist who reviewed the Case.
- **Sign ID** – the code of the Pathologist who signed the Case.
- **Sign Name** – the name of the Pathologist who signed the Case.
- **Sub ID** – the code of the Case Submitter.
- **Sub Name** – the name of the Case Submitter.
- **Visit ID** – the Visit Account Number.
- **Rec Date** – the Case received date.
- **Rev Date** – the date the Case was reviewed.
- **S.O. Date** – the date the Case was signed.

- **Flag** – the Case special flag.

- **Location** – the Visit location.

- **Site** – the Specimen site.

- **SSN** – the Patient Social Security Number.

- **Tech** – the User who accessioned the Case.

- **Adm ID** – the code of the Visit Admitter.

- **Adm Name** – the name of the Visit Admitter.

- **Cons ID** – the code of the Visit Consultor.

- **Cons Name** – the name of the Visit Consultor.

Filtering the Case List by Combination

Select *By Combination* from the *Select Menu* of the **Case List Window** to open the **Select Special Window** (Figure 2).

Respond **No** to the **Process only the selected Case rather than the entire list** prompt.
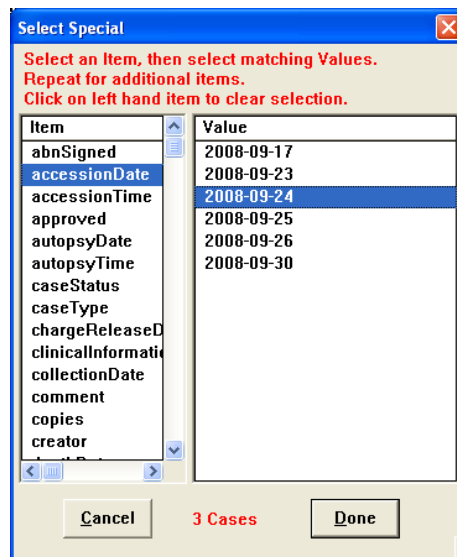
Figure 2 – **Select Special Window**

The **Select Special Window** allows you to quickly find one or more Cases based on selected criteria. For example, to select all Cases accessioned on a specific date, select **Accession Date** from the **Item** list on the left and the desired date from the **Value** list on the right and click **Done**. The **Case List** will be filtered to display only Cases accessioned on that date.

To filter the **Case List** by multiple criteria, open the **Select Special Window** again and select another filter. Click **Done**. The **Case List** will be further filtered to correspond with the both the first second filters.

Removing Case List Filters

You can remove all list filters and return to the complete **Case List** by clicking the **Reset All button**.

To remove only the last filter applied, click the **Reset button**.

Current Case Count

The **Count: field** displays the number of highlighted Cases, the number of Cases in the filtered current **Case List** and the total number of current Cases in **WindoPath** in **the format x/y/z.**

The following example shows the Current Case Count of **1/48/664.** This translates to *a total of 1 case is currently highlighted, out of the 48 cases currently filtered in the Case List, which is out of the total number of 664 current Cases.*
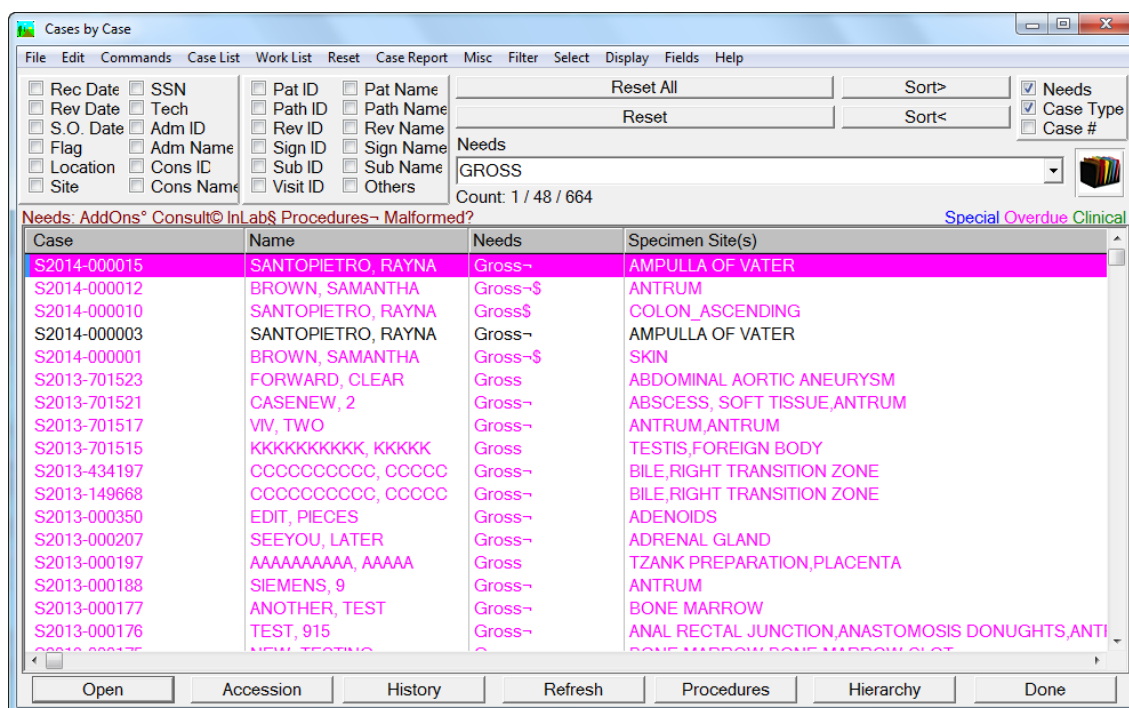
Figure 3 - **Filtered Case List with Count: x/y/z**

Hierarchy Window

The **Hierarchy Window** displays various elements of the selected case in an outline format. These elements include the Case Number, Specimen, Gross, Microscopic, Diagnosis, Specimen Block, Specimen Block Procedure and Specimen Charge Slip. WindoPath also displays the ObjectID (unique identifier) for each element which has an ObjectID.

Click **Hierarchy** on the **Case List Window** to open the **Hierarchy Window**. Click **Yes** to the prompt **Process only the selected cases rather than the entire list** to display the Case Hierarchy for only the selected Cases. Click **No** to display the Case Hierarchy for every Case in the **Case List Window**.
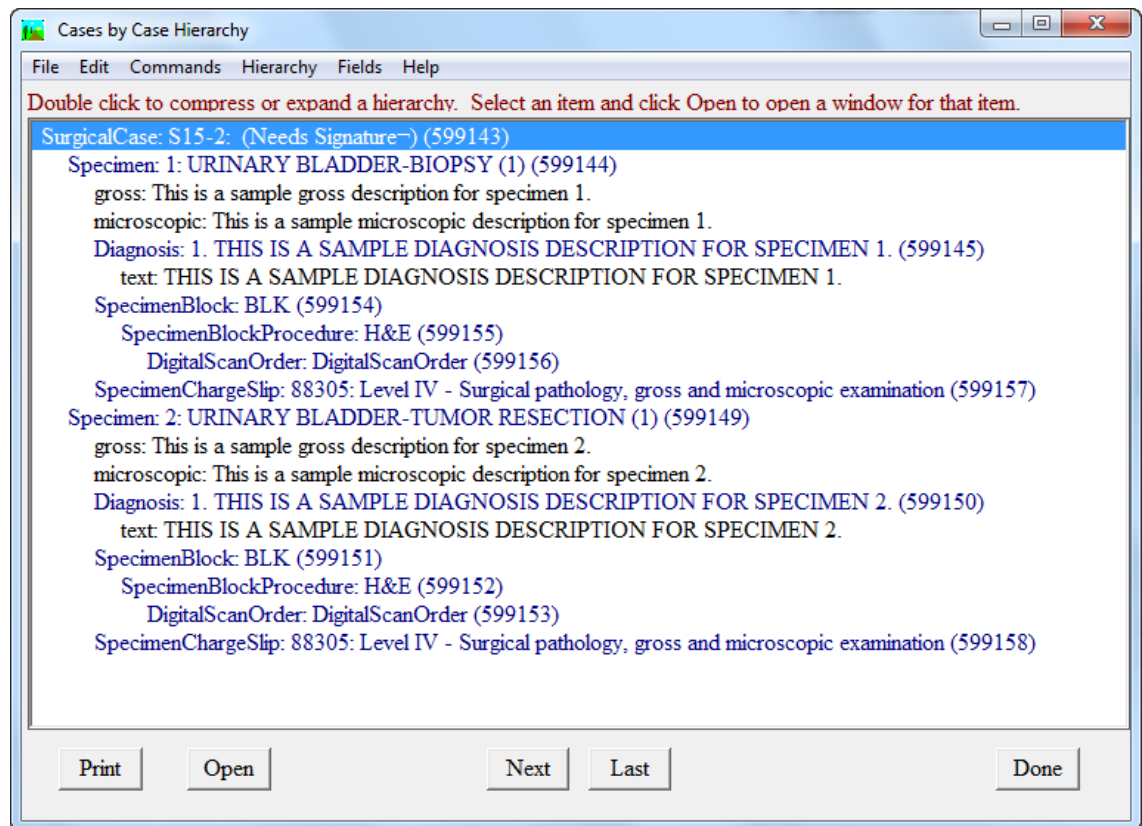
Figure 4 – **Hierarchy Window**

Hierarchy Window Action Buttons

- **Print –** Prints the content of the Hierarchy Window.

- **Open** – opens the **Quick Case Window** for the currently highlighted Case, Specimen or Diagnosis; opens the **Consult Window** for the currently highlighted Consult; opens the **Charge Selection Window** for the currently highlighted charge; opens the **Image Window** for the currently highlighted image; opens the **Special Flag Window** for the currently highlighted special flag; opens the **Profile Window** for the currently highlighted procedure; opens the **Add-On Window** for the currently highlighted Add-On.

- **Next** – highlights the next item of the same type in the **Hierarchy List**: if a Case is currently highlighted, highlights the next Case; if a Specimen is currently highlighted; highlights the next Specimen, etc.

- **Last** – highlights the previous item of the same type in the **Hierarchy List**: if a Case is currently highlighted, highlights the previous Case; if a Specimen is currently highlighted; highlights the previous Specimen, etc.

- **Done** – closes the **Hierarchy Window**.

Quick Case Window

The **Quick Case Window** is used throughout the processing of a Case and it can also be used to look up completed Cases. It gives quick access to the complete picture of the Case from one window using the **Full tab**. Almost all data entered on a Case can be viewed and edited in the **Quick Case Window** tabs.

Figure 5 – **Quick Case Window**

The **Quick Case Window** was designed with the Pathologist in mind. While recording gross descriptions, microscopic reports and diagnoses, the Pathologist can interactively review and edit any information on the Case from the Full tab.

There are many components to the **Quick Case Window**. They include several identification **fields**, the **Specimen List Box**, **tabs** and a **Diagnosis List Box**. It also contains several **action buttons**.

Quick Case Window Tabs

Each tab on the **Quick Case Window** displays data for the Case, the highlighted Specimen in the **Specimen List Box** or the highlighted Diagnosis in the **Diagnosis List Box**. On the keyboard, pressing **CTRL+Right** selects the next tab while pressing **CTRL+Left** selects the previous tab.

The following chart describes each tab of the **Quick Case Window** and the method for entering text in each tab.

Tab Name	Corresponds To	Text Entry	Formatter
C Com (Case Comment)	Case	Type free text or press **CTRL+L** to display entries from the **Phrases Library-Comment Box.**	Comment
C Info (Case Clinical Information)	Case	Type free text or press **CTRL+L** to display entries from the **Phrases Library-Clinical Information Box.** Data entered in the Accession Window, Case Tab, **Clinical Info Field** will automatically populate to this tab.	Case Clinical Info
C Note (Case Note)	Case	Type free text or press **CTRL+L** to display entries from the **Paragraphs Library**	Final Note
Diag (Diagnosis)	Diagnosis highlighted in **Diagnosis List Box**	Type free text or press **CTRL+L** to display entries from the **Diagnosis Library**	Diagnosis
D Note (Diagnosis Note)	Diagnosis highlighted in **Diagnosis List Box**	Type free text or press **CTRL+L** to display entries from the **Paragraphs Library**	Diagnosis Note
Full	Composite view of all Case, Specimen and Diagnosis data	(No text entry allowed)	N/A (no formatter section)
Gross (Gross Description)	Specimen highlighted in **Specimen List Box**	Type free text or press **CTRL+L** to display entries from the **Paragraphs Library**	Gross
ICD (ICD Code)	Diagnosis highlighted in **Diagnosis List Box**	Each code is displayed on a single line. To add a code, type the desired code on its own line. To delete a code, delete the line containing that code.	ICD Code, ICD Code by Specimen, Condensed ICD Codes, Condensed ICD Codes with Descriptions
Micro (Microscopic Description)	Specimen highlighted in **Specimen List Box**	Type free text or press **CTRL+L** to display entries from the **Paragraphs Library**	Microscopic
Notes	Case	Type free text or press **CTRL+L** to display entries from the **Paragraphs Library**	N/A (no formatter section)
Pre Diag (Preliminary Diagnosis)	Specimen highlighted in **Specimen List Box**	Type free text or press **CTRL+L** to display entries from the **Paragraphs Library**	Preliminary Diagnosis
Priv (Private)	Case	Type free text or press **CTRL+L** to display entries from the **Paragraphs Library.** Associated Preferences: O207 **Allow public access to private tab on Quick Case Window** and O553 **Go to Private Tab if full**.	Miscellany
Reason (for Corrected Reports)	Case	Type free text or press **CTRL+L** to display entries from the **Paragraphs Library**	Reason
S Com (Specimen Comment)	Specimen highlighted in **Specimen List Box**	Type free text or press **CTRL+L** to display entries from the **Phrases Library-Comment Box.** Data entered in the Accession Window, Specimen Tab, **Comment Field** will automatically populate to this tab.	Specimen Comment

S Info (Specimen Clinical Information)	Specimen highlighted in **Specimen List Box**	Type free text or press **CTRL+L** to display entries from the **Phrases Library-Clinical Information Box.** Data entered in the Accession Window, Specimen Tab, **Clin Info Field** will automatically populate to this tab.	Specimen Clinical Info
SNOMED (SNOMED Code)	Diagnosis highlighted in **Diagnosis List Box**	Each code is displayed on a single line. To add a code, type the desired code on its own line. To delete a code, delete the line containing that code.	SNOMED Code
Spec Ins (Special Instructions)	Specimen highlighted in **Specimen List Box**	Type free text or press **CTRL+L** to display entries from the **Paragraphs Library**	N/A (no formatter section)
Sup Rep (Unsigned Supplemental Report)	Case	Type free text or press **CTRL+L** to display entries from the **Paragraphs Library**	Supplemental Report
Syn (Synoptic Report)	Diagnosis highlighted in **Diagnosis List Box**	Press **CTRL+L** to open the Synoptic Reporting Application Window. Associated Preference: O694 **Print synoptic in diagnosis section of report**.	Synoptic Report Section, Diagnosis Section (if O694 = **True**)
Dig Rev (requires purchase of the Aperio module for digital images)	N/A	N/A	N/A
Extra 1 - 5	Case	Type free text or press **CTRL+L** to display entries from the **Paragraphs Library.** Associated Preference: O522 **Extra tabs in Quick Case Window**.	Extra 1 – 5 (if O522 = **True**)

Quick Case Window Tabs – Special Notes

- **Extra 1 – 5** – there are 5 optional, preference-generated tabs (O522 **Use extra tabs**) tabs named **Extra1** through **Extra5**.

- **Full** – text may not be edited in this tab. Typing in this tab displays the message **Editing is not allowed**. Works with Preferences O30, **Show Miscellaneous in Full Tab** and O520, **Always open QCW to Full Tab**.

- **Notes** – text entered in this tab does not print on reports.

- **Priv** – Private Pathologist notes. Text entered in this tab may only be viewed by the Pathologist assigned to the Case. (This is determined by the Pathologist assigned to the current User in the **Human Resources – User Window**). Works with Reserved Preference O207, **Allow public access to private tab**, When **True:** Data in the Priv tab in QCW can be added, viewed, modified or deleted by any user. When **False:** Data in the Priv tab in QCW can only be added, viewed, modified or deleted by the pathologist assigned to the case.

- **Spec Ins** – text entered in this tab does not print on reports.

- **Sup Rep** – this tab that accepts text entry or editing after the case has reached the stage *Complete*. If the site wide preference S74, **Require signature on Supplementals**, is set to **True**, use of this tab is disabled.

Quick Case Window Tips

- The Case *Needs* status is displayed in the title bar. Each time you make a change that advances the *Needs*, the title bar *Needs* display is updated.

- When opening the window, the appropriate tab is selected automatically based on Case *Needs*. If the Case is at *Needs Gross*, the Gross tab is selected; if the Case is at *Needs Microscopic*, the Micro tab is selected; If the Case is at *Needs Diagnosis*, the Diag tab is selected.

- Triple clicking on a word highlights the entire line containing that word.

- Clicking and dragging highlighted text moves it to another position in the tab.

- Selecting **Expand Text Box** from the *Commands Menu* displays a larger window containing the full text of the currently selected tab. The display area is much greater to allow viewing of large amounts of text. Any modifications made in this expanded window, including bold or italics, will appear in the original tab when the expanded window is closed.

- When text is entered in a tab, it is not automatically saved. However, as soon as another tab, Specimen or Diagnosis is selected, the text is saved.

Quick Case Window Text Editing

You can edit text within each tab. (Signed out Cases cannot be edited except by the Case signer.)

To format bold text, highlight the text and press **ALT+B**.

To format italic text, highlight the text and press **ALT+I.**

To format bold italic text, highlight the text and press **ALT+CTRL+B**.

To format normal text, highlight the text and press **ALT+N**.

Press **CTRL+I** to fill in the blanks on library entries containing blanks (underscores).

Press **CTRL+L** in blanks (underscores) to display entries from the **Phrases Library – Miscellaneous Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

If you prefer working in a word processor, select **Word Process** from the *Reporting Menu* or press **CTRL+W**. The full report will be displayed in Microsoft Word or another word processing program. Refer to the section entitled **Case Report Window** in *Chapter 6 – Diagnostic Result Entry & Sign Out* for more information.

Quick Case Window Fields

Data displayed in *italics* indicates that this field is *read-only* and cannot be modified from the **Quick Case Window**:

- **Name** – the Patient's name in the format *lastname, firstname*.

- **MedRec** – the Patient's Medical Record Number.

- **Acct** – the account number of the Visit associated with the Case.

- **Tech (unlabeled field)** – the initials of the User who accessioned the Case.

- **Sex** – the Patient's sex.

- **Age** – the current age of the Patient, calculated as the Patient's date of birth subtracted from today's date.

- **Path** – the Pathologist assigned to the Case. To change the Pathologist, delete the name from this field and press **CTRL+L** to display entries from the **Pathologist Library**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Phys** – this drop-down field displays the code and name of the Physician who was entered as the Submitter on the Case. If a Consultor was also entered or any additional Physicians, they can be displayed from this field. Click the **arrow button** to display the list of Physicians for the Case. Refer to *Chapter 3 – Accessioning* for more information on adding or deleting Physicians.

- **DOB** – patient date of birth.

Quick Case Window List Boxes

- **Specimen List Box** – lists all the Specimens that have been created for the Case. To view any data for a specific Specimen, you must first click on the Specimen in the **Specimen List Box**. The first column in the **Specimen List Box** displays the Specimen number or letter designation. The second column displays the Specimen source. It will also display an 'i' if the Specimen has an Image, and/or an 'f' if the Specimen has an Add-On. The third column displays the Digital Images ordered on the specimen, if any.

- **Diagnosis List Box** – lists all the Diagnoses that have been entered on the highlighted Specimen, one Diagnosis per line. Click on a Diagnosis in the list to display the full Diagnosis in the **Diagnosis tab**. The first column in the **Diagnosis List Box** displays the Diagnosis number. The second column displays partial Diagnosis text. The third column displays the Diagnosis note. The fourth column displays the Diagnosis code.

Quick Case Window Action Buttons

- **Sign** – opens the **Pathologist Signature Window** to sign out the Case. **Sign** is only available if the Case is at the status *Needs Signature* and the current User has an associated Pathologist defined as a Signer. Refer to *Chapter 10 – Human Resources* for more information on User security.

- **History** – opens the **History Window** for the current Patient, described in *Chapter 10 – Human Resources*. This button is enabled only if the current Patient has historical Cases in **WindoPath**.

- **Proc.** – opens the **Procedure List Window**. The **Procedure List Window** is described later in this chapter.

- **Dictated** – flags the Case as having the gross and/or microscopic description dictated. To flag the Case as having its gross description dictated, click the **Gross tab** then click **Dictated**. You have the option of flagging only the current Specimen or flagging all Specimens on the Case. A Ð is placed in the **Gross tab** and **Dictated** becomes disabled. In laboratories where Pathologists do not wish to use the computer system, Case *Needs* can be manually advanced from *Needs Gross* to *Needs Gross Entry* by using the *Advance Needs* option from the *Modify Menu*.

- **Preview** – opens the **Print Preview Window**, displaying the report for the current Case on the screen.

- **Previous** – opens the **Quick Case Window** for the previous Case in the current **Case List.**

- **Next** – opens the **Quick Case Window** for the next Case in the current **Case List**.

- **Done** – closes the **Quick Case Window** and returns to the **Case List Window**.

Quick Case Window Check Boxes

In the upper right corner of the **Quick Case Window** are the following check boxes that are used to open the appropriate window for that data:

- **Consults** – opens the **Consult List Window**. If a Consult has been entered on the Case, there will be a check mark in this box.

- **Images** – opens the **Image List Window**. If an Image has been entered on the Specimen highlighted in the **Specimen List Box**, there will be a check mark in this box.

- **Add-Ons** – opens the **Add-On List Window**. This list includes all Frozen Sections, Instruments, signed Supplemental Reports and other types of immediate consults. Each item in this list must be signed out by a Pathologist. If an Add-On item has been entered on the Specimen highlighted in the **Specimen List Box**, there will be a check mark in this box.

Quick Case Window Menus

Reporting Menu

- *Print Preview...* – displays the report for the current Case on the screen. If Site Wide Preference O286, **Display full page print preview**, is set to **True**, print previews are displayed as a single page without required scrolling. To switch to the **Scroll View** print preview, press the **Scroll button**. To switch back to the **Full Page View** from the scroll view print preview, press the **Full Page button**.

  To sign out the case report, click **Sign**.

  Click the **Case Next button** to preview the next case report. Click the **Case Previous button** to preview the previous case report.

  Click the **Edit button** to edit the report in the **Word Processor Window.**

  Click the **Print Replica button** to print a replica copy of the previewed report. Click the **Print Original button** to print an original copy of the previewed report.

  Click the **Page Previous button** to preview the previous page of the case report. Click the **Page Next button** to preview the next page of the case report.

  To exit the Print Preview, click **Done**.

- *Open PDF…* – opens a PDF of the current Case report.

- *Print Report...* – **CTRL+SHIFT+P** – opens the standard print window to print a single report for the current Case. You have the option of printing multiple copies of the Case report. When multiple copies are specified, a separate report prints for each of the Patient's Physicians and one original copy labeled appropriately. Billing, File and Medical Records copies may be printed, if the preferences to do so are enabled.

- *Fax/eMail Report...* – opens the **Fax Selection Window** where you can specify the Physicians to receive a facsimile of the single Case report. The **Fax Selection Window** is described in *Chapter 7 – Final Report and Report Distribution*.

- *Print History...* – prints the Case numbers and Diagnoses of all Cases for the current Patient. Refer to *Chapter 10 – Human Resources* for more information.

- *Specify Copies* – **CTRL+SHIFT+C** – opens the **Extra Copies Window** where you can specify the number of extra copies you would like to print for the current Case report. Type a number or use the **arrow buttons**. Click **OK** to accept the number entered. When the Case report is printed, respond **Yes** to the **Distribute multiple copies** prompt. Each extra copy specified will be printed and labeled **Extra Copy**.

- *Auto Display History* – toggle switch to automatically display the **History Window** for each Patient as the Case is displayed in the **Quick Case Window**. The **History Window** is described in *Chapter 10 – Human Resources*. If there is no history for the current Patient, the **History Window** does not open.

- *Auto Fax/eMail Reports* – toggle switch to automatically fax each report after each Case is signed out. When this menu item is selected, signing out the Case opens the **Fax Selection Window** where you can specify the Physicians to receive a facsimile of the single Case report. The **Fax Selection Window** is described in *Chapter 7 – Final Report and Report Distribution*.

- *Auto Preview Reports* – toggle switch to automatically open the **Print Preview Window** for every Case when the **Quick Case Window** is opened.

- *Auto Print Reports* – toggle switch to automatically print each report after each Case is signed out.

- *Highlight Keywords* – in the currently selected tab, highlights any words that have been defined as keywords in the **Phrases Library** – **Keywords Box**.

- *Print Rich Text* – for Psyche use only.

- *Print Text…* – opens the standard print window to print the contents of the currently selected tab.

- *Word Process* – **CTRL+W** – navigates the Case report to an internal or external word processor so that text editing can be performed on multiple Quick Case Window tabs using one application.

- *Synoptic Report* – **CTRL+Y** – opens Microsoft Word, allowing a CAP template to be loaded and modified. This menu item is only available if the reserved preference **Use CAP templates for synoptic reporting** is set to **True**.

- *Set on Hold* – opens a pop-up box to specify a date and time until which the final report for this Case should be held. Cases set on hold advance to the status *Needs Release* at sign out. To advance the Case to *Needs Final Report*, highlight the Case in the **Case List** and press **CTRL+M**. If a hold date has been set on a Case, a checkmark will appear before this menu item.

- *Report Definition* – displays the report template (defined in the Formatter) that will be used when printing the report for this Case.

Navigate Menu

- *Go to Full* – **ALT+F** – opens the **Full tab**.

- *Go to Gross* – **ALT+G** – opens the **Gross tab**.

- *Go to Diagnosis* – **ALT+,** – opens the **Diag tab**.

- *Go to Micro* – **ALT+M** – opens the **Micro tab**.

- *Go to Pathologist* – **CTRL+.** – places the cursor in the **Pathologist field**.

- *Next Diagnosis* – **ALT+D** – opens the **Diagnosis tab** for the next Diagnosis in the **Diagnosis List Box**.

- *Next Specimen* – **ALT+P** – opens the same tab for the next Specimen in the **Specimen List Box**.

- *Next Tab* – **CTRL+Right** – opens the tab to the right of the current tab.

- *Previous Tab* – **CTRL+Left** – opens the tab to the left of the current tab.

- *Previous Diagnosis* – **ALT+SHIFT+D** – opens the **Diagnosis tab** for the previous Diagnosis in the **Diagnosis List Box**.

- *Previous Specimen* – **ALT+SHIFT+P** – opens the same tab for the previous Specimen in the **Specimen List Box**.

- *Pap Case Window* – on Pap Cases only, opens the **Pap Case Window** for the current Case.

- *Enable Fast Data Entry Mode* – not used.

Add/Delete Menu

- *Add Case Add-on* – opens the **Add-On List Window** described later in this chapter. Case Add-Ons work identically to Specimen Add-Ons with the exception that images may not be added to Case Add-Ons.

- *Add Case* – opens the **Accession Window** so a new Case can be accessioned on the current Patient. The **Accession Window** for the current Case with the **Case tab** forward. Press **CTRL+N** to clear the **Case tab** for new Case entry.

- *Add Diagnosis* – **CTRL+SHIFT+D** – opens an empty **Diagnosis tab** for the highlighted Specimen in the **Specimen List Box**. If the Case has been signed out, only the Case signer can add Diagnoses. If the Case is at the stage *Complete*, no User can add a Diagnosis.

- *Add Specimen* – opens the **Accession Window** so a new Specimen can be added to the current Case. The **Accession Window** for the current Case with the **Specimen tab** forward. Press **ENTER** and **CTRL+N** to clear the **Specimen tab** for new Specimen entry. If the Case has been signed out,

only the Case signer can add Specimens. If the Case is at the stage *Complete*, no User can add a Specimen.

- *Add Table* – opens the **Tables Library**, allowing a table to be added to the current Specimen or Diagnosis. Only one table can be added per Specimen or Diagnosis. This menu item is only available when a Specimen or Diagnosis level tab is selected. Refer to the section entitled **Tables** for more information.

- *Add Template* – navigates to the Template Directory specified in Preferences, allowing a predefined template to be added to the current Specimen. Templates are saved as a Specimen image and will print on reports.

- *Delete Diagnosis* – deletes the highlighted Diagnosis in the **Diagnosis List Box** on Cases that have not yet been signed out. If the Case has been signed out, only the Case signer can delete Diagnoses. If the Case is at the stage *Complete*, no User can delete the Diagnosis.

- *Delete Specimen* – deletes the highlighted Specimen in the **Specimen List Box** on Cases that have not yet been signed out. If the Case has been signed out, only the Case signer can delete Specimens. If the Case is at the stage *Complete*, no User can delete the Specimen.

- *Delete Table* – deletes the table associated with the current Specimen or Diagnosis.

- *Delete Template* – deletes the template associated with the current Specimen.

- *Add ICD Code* – **CTRL+SHIFT+I** - opens the **ICD Code Library** to allow selection of ICD Codes for the Diagnosis highlighted in the **Diagnosis List Box**.

- *Assign Diag. to All Specimens* – **CTRL+ALT+A** – copies the diagnosis highlighted in the **Diagnosis List Box** to each Specimen on the Case. If the Case has been signed out, only the Case signer can add Diagnoses. If the Case is at the stage *Complete*, no User can add a Diagnosis.

- *Load Case* – **CTRL+K** – opens the **Case Number Entry Box** where the number of the next Case to be opened can be entered. Enter the complete Case number you wish to search for and click **OK**. You can use the **arrow buttons** to enter the Case letter prefix, year and accession number or type free text. Click **Cancel** to quit the search. If a Case with that number is found, the **Quick Case Window** for that Case is opened. If no active Case matching the number entered is found, the message **No such active Case. Check database** is displayed. Click **Yes** to search the database for the Case. Click **No** to cancel the operation. If no Case number matching the number entered is found, the message **No such Case** is displayed. Click **OK** to close the box and return to the **Quick Case Window**.

- *Capture Images* – **ALT+C** – attaches any images stored in the PC's WindoPath Files\Captured Specimen Images folder to the currently selected Specimen.

- *Case Documents* – opens the **Case Document List Window**, displaying a list of all documents attached to the Case. Refer to the section entitled **Documents** for more information.

- *Case Images* – opens the **Image List Window** or the **Image Thumbnail Window**, allowing the user to add case-level images. Images will display on the report in the **Case Images** section.

- *Case Notes* – opens the **Case Note List Window**, displaying any additional notes that have been added to the Case. To add a new note, click **New**. Enter text in the text box and click **Done**. To open an existing note, highlight the note in the list and click **Open**. To delete an existing note, highlight the note in the list and click **Delete**. Case notes do not print on reports. This menu item is only available if the reserved preference 'Use Case Notes' is set to **True**.

- *Case Procedures* – **ALT+R** – opens the **Procedure List Window**, displaying all procedures for the current Case.

- *Charges* – **CTRL+=** – opens the **Charge Selection Window** for ordering charges on a Case. The **Charge Selection Window** is described in *Chapter 6 – Diagnostic Result Entry & Sign Out*.

- *Diagnosis Images* – opens the **Image List Window** or the **Image Thumbnail Window**, allowing the user to add diagnosis-level images. Images will display on the report in the **Diagnosis Images** section.

- *Dictation* – **CTRL+ALT+V** – opens the PC's default sound program, allowing a dictation file to be created for the current Case.

- *Select Pre-Recorded Dictation* – navigates to the Dictation Directory specified in Preferences, allowing a dictation file to be associated with the current Case.

- *Specimen Procedures* – **ALT+SHIFT+R** – opens the **Procedure List Window**, displaying all procedures for the highlighted Specimen in the **Specimen List Box**.

Modify Menu

- *Case* – opens the **Accession Window** for the current Case with the **Case tab** forward. Press **Done** to return to the **Quick Case Window**.

- *Clear Diagnosis Record* – this will delete the current diagnosis and create a new one.

- *Diagnosis Code* – opens a pop-up box to add or modify the Diagnosis code for the Diagnosis highlighted in the **Diagnosis List**.

- *Font* – allows modification of the font used in the **Quick Case Window**. The message **Modify Quick Case Font then click a new tab** is displayed. Click **OK** to open the **Page Layout Window**. Click **Quick Case** to open the standard **Font Selection Window**. Select the desired Font, Attribute and Point Size and click **Done** (Only enabled if the current User has *Report Format* privileges).

- *Grosser…* – **CTRL+ ,** – displays a complete list of initials from the **Pathologist Library** to allow changing the default grosser initials for the highlighted Specimen or for all Specimens on the Case. Highlight the desired initials and click **Done**. The message **Apply to all specimens** will be displayed. Click **Yes** to change the grosser initials for all Specimens on the Case. Click **No** to change the grosser initials for only the Specimen highlighted in the **Specimen List Box**.

- *Physicians…* – opens the **Physicians List Box** to select Physicians on the Case. Refer to *Chapter 3 – Accessioning* for more information on adding or deleting Physicians.

- *Profiles* **–** opens a window displaying information for the current profile that is assigned to the highlighted specimen, including type, designation, number, pieces and description.

- *Specimen* – opens the **Accession Window** for the current Case with the **Specimen tab** forward. Press **Done** to return to the **Quick Case Window**.

- *Slide Count* – opens a pop-up box to enter the number of slides for the current Specimen.

- *Special Flags* – opens the **Special Flag List Window**, displaying all special flags currently associated with the Case. To add a new flag, click **New**. A drop-down menu displaying entries from the **Phrases Library** – **Special Flag Box** is displayed. To select a special flag, select an entry from the list and click **Done**. Click **Cancel** to cancel the operation. Click **Next** to add another special flag to the Case. If the current Case already has a special flag selected, a checkmark will precede this menu item. To display the special flag(s), click on the menu item.

- *Sign Out Location* – opens a drop-down menu displaying entries from the **Phrases Library** – **Sign Out Location Box**. To select a sign out location, select an entry from the list and click **Done**. Click **Cancel** to cancel the operation.

- *Table* – opens the **Table Window** for the table assigned to the Specimen highlighted in the **Specimen List Box** or the Diagnosis highlighted in the **Diagnosis List Box**.

- *Template* – navigates to the Specimen Image folder for the current Specimen, displaying the template file associated with the current Specimen. The template may then be modified and saved.

- *Flag for Review* – changes the Case *Needs* to *Needs Review*. The Case must be reviewed and signed by a second Pathologist.

- *Sign Out* – **ALT+X** – opens the **Pathologist Signature Window** to sign out the Case. *Sign Out* is only available if the Case is at the status *Needs Signature* and the current User is associated with a *Signer*. Refer to *Chapter 10 – Human Resources* for more information on User security.

- *Unflag for Review* – for Cases at the stage *Needs Review*, reverts the Case to the *Needs* status before the Case was flagged for review. *This menu item is only available if the current User has Manager privileges.*

- *Unsign Out* – reverts the Case *Needs* to *Needs Signature*. *This menu item is only available if the current User has Manager privileges and the Case is at the stage Needs Final Report or Needs Distribution.*

- *Advance Needs* – changes the *Needs* status of Cases at *Needs Gross* to *Needs Gross Entry*; at *Needs Microscopic* to *Needs Microscopic Entry*; at *Needs Release* to *Needs Final Report*; at *Needs Final Report* to *Needs Distribution*; at *Needs Distribution* to *Complete*.

- *Enter Archive Cases* – opens the **Accession Window** with the **Case tab** forward. Press **CTRL+N** to clear the **Case tab** for Archive Case entry. Archive Cases are described in *Chapter 3 – Accessioning*.

- *Fax/email on Sign Out* – flags the current Case to be automatically faxed on sign out. When this menu item is selected, signing out the Case opens the **Fax Selection Window** where you can specify the Physicians to receive a facsimile of the single Case report. The **Fax Selection Window** is described in *Chapter 6 – Diagnostic Result Entry & Sign Out.*

- *Renumber Specimen* – opens the **Specimen Renumbering Window** described in *Chapter 3 – Accessioning*.

- *Replace <source>* – if the currently selected tab contains the text '<source>', selecting this menu item replaces that text with the site of the current Specimen source. Use <source>, <SOURCE> or <Source> depending on whether you want the text to be lowercase, uppercase or both.

- *Show All Dictations* – navigates to the Dictation Directory specified in Preferences, displaying all available dictation files.

- *Clone Case* – *for Psyche use only*.

- *Correct Case* (**Completed Cases Only**) – creates a duplicate Case for the current Case, appending a .1 (.2, etc.) to the original Case number. Corrected (Amended) Cases are described in *Chapter 7 – Final Report and Report Distribution*.

- *Correct Number* – opens the **Case Number Entry Box** to modify the Case letter prefix, year and/or the accession number on a Case that has not yet been signed out. You can change the Case number to any unused Case number. If the number entered already exists, the message **Sorry, number used** is displayed. Click **OK** to return to the **Case Number Entry Box.**

- *Preliminary Case* – flags the current Case as being **Preliminary** and creates a Corrected (.1) Case. This allows the current Case to be diagnosed and signed out, but labeled 'Preliminary' when printed instead of 'Final'. When the final results for the Case are determined, the results are entered on the Corrected Case, which is signed and printed as 'Final' instead of 'Amended.'

- *Verify Case* – if the preference **Do bar code validation for grosses** is set to **True**, the Modify menu will display a menu item called **Verify Case**. This menu item will be active if the current specimen needs a gross. When this item is selected, the Case Number Validation Dialog appears and functions as usual. This allows the user to verify the case number from scanned labels at any

- *Show Ad Hoc Reflex Tests* – If an Ad Hoc Reflex is ordered on the case at accession, there will be a check mark displaying next to the **Show Ad Hoc Reflex Tests** Menu Item in the Quick Case Window's Modify Menu. This indicates that an Ad Hoc Rule exists for this case. If you click that menu item WindoPath will evaluate if the current diagnosis will order the reflex

- *Report Title Modifier* (**Corrected Cases Only**) – opens a drop-down menu of terms to use in the title line of the current Case report (Corrected, Amended, etc.). This menu item is only available if the reserved preference **Ask user for corrected report title modifier** is set to **True**.

Move Menu

- *Diagnosis Up* – moves the highlighted Diagnosis up from its current position in the **Diagnosis List Box**. For example, highlight the second Diagnosis in the list and select *Diagnosis Up*. The second Diagnosis

becomes the first Diagnosis and the first Diagnosis becomes the second Diagnosis. *This menu item is only available if the reserved preference* **Number Diagnoses** *is set to* ***True***.

- *Specimen Up* – moves the highlighted Specimen up from its current position in the **Specimen List Box**. For example, highlight Specimen B in the list and select *Specimen Up*. Specimen B becomes Specimen A and Specimen A becomes Specimen B.

- *Diagnosis Down* – moves the highlighted Diagnosis down from its current position in the **Diagnosis List Box**. For example, highlight the first Diagnosis in the list and select *Diagnosis Down*. The first Diagnosis becomes the second Diagnosis and the second Diagnosis becomes the first Diagnosis. *This menu item is only available if the reserved preference* **Number Diagnoses** *is set to* ***True***.

- *Specimen Down* – moves the highlighted Specimen down from its current position in the **Specimen List Box**. For example, highlight Specimen A in the list and select *Specimen Down*. Specimen A becomes Specimen B and Specimen B becomes Specimen A.

Display Menu

The *Display Menu* is described in *Chapter 2 – Patients & Visits.*

Consults

Clicking the **Consults Check Box** opens the **Consult List Window** that lists any hospitals that have received consults for this Case and allows you to add new consults.

Consult List Window

Consult List Window Action Buttons

- **New** – opens a blank **Consult Window** to add a new consult on the Case.

- **Open** – If there are any consults on the Case, this button is enabled. Click **Open** to open the **Consult Window** for the currently highlighted consult.

- **Delete** – If there are any consults on the Case, this button is enabled. Click **Delete** to delete the currently highlighted consult.

- **Done** – closes the **Consult List Window**.

Double clicking on an existing consult in the **Consult List Window** opens the window for that consult.

Consult Window

To add a new consult to the Case, click **New** on the **Consult List Window**. The **Consult Window**, shown in Figure 6, opens.

Consult Window Fields

- **Hospital>** – the hospital that received the consult. Press **CTRL+L** in this field to display entries from the **Yellow Pages Library**. To select a library entry, highlight it and click **Select** or press **ENTER**.

  You can limit the **Yellow Pages Library** by entering the name (or partial name) of the hospital and then pressing **CTRL+L**. You can also enter a specific hospital directly by typing the pound sign (#) followed by the Hospital code and then pressing **TAB** (or **CTRL+L**). The matching hospital name will be inserted in the **Hospital field**.

Figure 6 - **Consult Window**

- **Consultor>** – the Physician who consulted in the Case. The > sign before this field indicates that this entry **must** be made from the Library in one of the following ways:

  1. Display the complete **Physicians Library** by pressing **CTRL+L**. Physicians are listed in order by code. You can display the list in alphabetical order by name by right clicking on the Name column heading. To find a specific Physician by code, enter the code in the **Find Code:** field. To find a specific Physician by name, right click on the Name column heading and enter the name (or partial name) in the **Find Name:** field. To select a Physician, highlight the name in the list and click **Select** or press **ENTER**.

  2. Enter the full or partial name of the Physician and press **CTRL+L**. All Physicians matching the entered criteria will be listed. To select a

Physician, highlight the name in the list and click **Select** or press **ENTER**.

3. Type the pound sign (#) followed by the complete Physician code and press **CTRL+L**. The matching Physician name will be inserted in the **Consultor field**.

4. Type the complete Physician code and press **SHIFT+CTRL+L**. The matching Physician name will be inserted in the **Consultor field**.

- **Consult Type** – the type of consult, for example, internal or external. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library–Consult Type Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Date Sent** – the date the consult left the pathology laboratory. The current date is filled in when creating new consults. You can also type free text in this field.

- **Blocks Sent** – the number of Specimen blocks sent for consult.

- **Slides Sent** – the number of Specimen slides sent for consult.

- **Text Sent** – any questions or instructions that might accompany the Specimens. You can enter free text in this field or press **CTRL+L** to display entries from the **Paragraphs Library**.

- **Date Returned** – the date the Specimen and consult report were returned. A return date must be entered in order for the consult flag (©) to be removed from the Case *Needs* in the **Case List Window**.

- **Blocks Returned** – the number of Specimen blocks that were returned.

- **Slides Returned** – the number of Specimen slides that were returned.

- **Text Returned** – the actual consult report received from the consulting hospital. Data entry for the **Consult Received Box** is performed in the same manner as for the **Consult Sent Box**.

- **Correlation Drop Down Menu** – allows the user to flag the consult with one of three hard-coded correlation options: **No result issued**, **Correlates with Preliminary Diagnosis** or **Does Not Correlate with Preliminary Diagnosis**.

Consult Window Action Buttons

- **Cancel** – closes the **Consult Window** without saving any changes.

- **Print** – opens the standard print window to print the current consult report.

- **Next** – opens the next consult in the **Consult List** or a blank **Consult Window** on new consults.

- **Save** – saves any new data entered since the window was opened.

- **Done** – closes the **Consult Window**, saving any changes.

Once a consult has been added to the Case, the **Consult Check Box** is flagged with a checkmark. Cases that have pending consults are flagged with a copyright symbol (©) after the Case number in the **Case List Window**. This flag is no longer displayed once the Date Returned is entered.

If a Case is signed out with a pending consult, it does not become deactivated until all consults are completed.

Consult Window Check Boxes

- **Images** – opens the **Image List Window**. If an Image has been entered on the Consult, there will be a check mark in this box.

- **Documents** – opens the **Consult Documents List Window**. If a document has been entered on the Consult, there will be a check mark in this box.

Consult Window Menu

Consult Menu

- *Print Preview* – displays the report for the current Consult on the screen, one page at a time. To view the entire page, use the scroll bars or press **Scroll** or **ENTER** to move down the page or **SHIFT+ENTER** to move up. Click **Next** to display the next page of a multiple-page report. Click **Previous** to display the previous page of a multiple-page report. To exit the Print Preview, click **Done.**

- *Capture Images* – **ALT+C** – if any images have been saved in the WindoPath Files\Captured Consult Images folder on this PC, these images are automatically associated with this Consult and copied to the appropriate Consult Images directory on the server.

- *Documents* – opens the **Consult Documents List Window**, listing any documents for the current Consult.

- *Images* – opens the **Image List Window**, listing any images for the current Consult.

Consult Images

Refer to the sections entitled **Image List Window** and **Image Window** for instructions on creating Consult Images.

Consult Documents

Refer to the section entitled **Documents** for instructions on creating Consult Documents.

Images

There are three types of images that can be created in **WindoPath**: Case Images, Diagnosis Images and Specimen Images (Microscopic, Gross or Other).

Case and Diagnosis Images are added from the **Add/Delete Menu** in the **Quick Case Window.** Specimen Images are entered from the **Images check box** on the **Quick Case Window**.

Images may also be added as Consult Images and Add-On Images. Consult Images are entered from the **Images check box** on the **Consult Window**. Add-On Images are entered from the **Images List Box** on the **Add-On Window**.

In order for images to be accessible to all Users, images should be stored in a shared folder on the fileserver. The Image and Consult Image folders should be specified from the **Preferences Window** – *Site Wide Menu* – *Directories* menu item.

Image List Window

Clicking the **Images check box** opens the **Image List Window** that lists any image files for the selected Specimen or Consult and allows you to add a new image. In the **Add-On Window**, double click on any image in the **Image List Box** to open the **Image Window**. Click **Add** to add a new image. Each Specimen, Consult or Add-On can have an unlimited number of images (Figure 7).
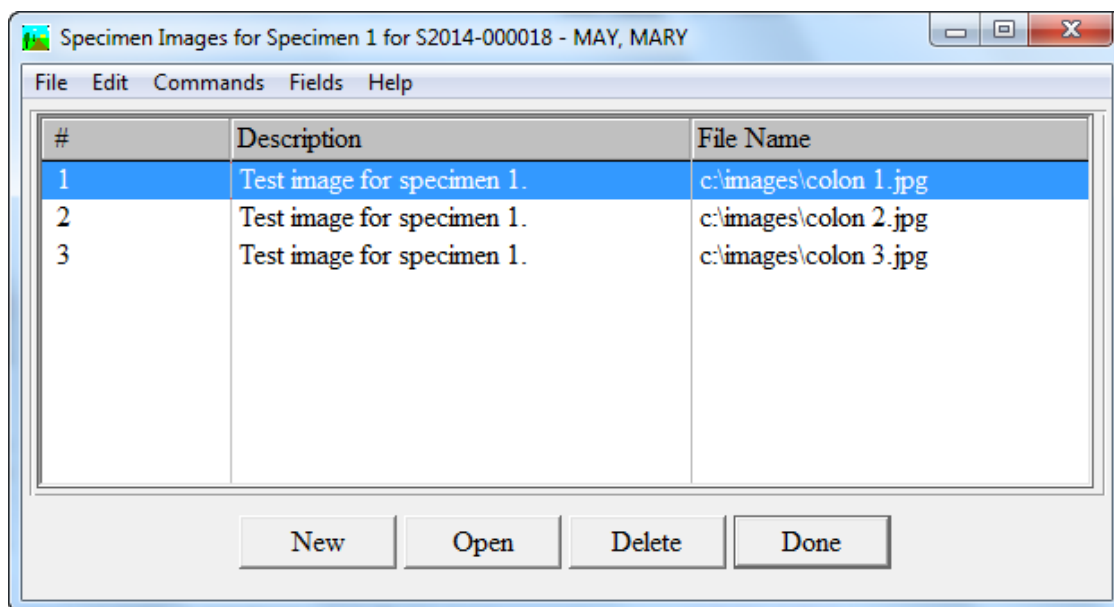
Figure 7 – **Image List Window**

Image List Window Columns

- **#** – the number of the image.

- **Description** *(caption)* –the User-defined name of the image.

- **File Name** – the path to the image file.

Image List Window Action Buttons

- **New** – opens a blank **Image Window** to add a new image on the Specimen, Consult or Add-On.

- **Open** – opens the **Image Window** for the currently highlighted image.

- **Delete** – deletes the currently highlighted image.

- **Done** – closes the **Image List Window**.

Image Window

With Preference O683, **Use thumbnails to view images**, set to **False**, WindoPath will display one image at a time in the **Image Window** (Figure 8).

Image Window Fields

- **Description** – the text of the caption to print below the image on the report.

- **#** – the image number used to tell WindoPath in what order the images should appear if there is more than one image of a particular type. This is a required field even if you only have one image.

- **Image Type Drop Down Field** – type of image (Gross, Micro or Other).

Image Window Action Buttons

- **Load Image** – opens the standard file selection window to select the image file.

- **Annotate** – opens the default image editing program (Paint, etc.) where the current image can be annotated.

- **Reload** – reloads the current image, displaying any changes that have been made since the **Image Window** was opened.

- **Cancel** – closes the **Image Window** without saving any changes.

- **Next** – opens the next image in the **Image List Window**, if any.

- **Done** – closes the **Image Window** saving any changes.

Image Window Check Boxes

- **Unused** – not used.

- **Print** – check this box if you want the image to print on the report.

Once an Image has been added to a Specimen or Consult, the **Images Check Box** is flagged with a checkmark.

Image Window Menu

- *Load New Image* – opens the standard file selection window to select an image file.

- *Annotate* – **ALT+A** – opens the default image editing program (Paint, etc.) where the current image can be annotated.

- *Reload Current Image* – reloads the current image, displaying any changes that have been made since the **Image Window** was opened.

- *Copy image to clipboard* – copies the current image to the PC's clipboard.

- *Paste image from clipboard* – pastes an image from the PC's clipboard into the **Image Window**.
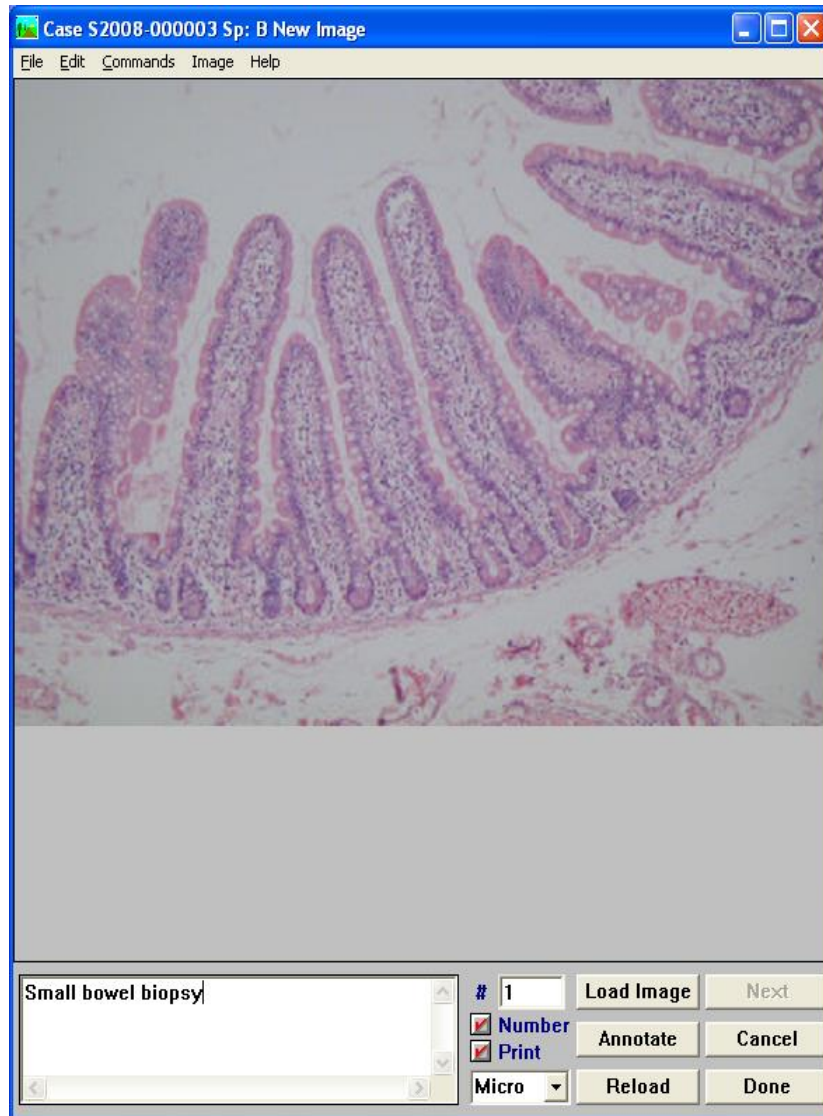
Figure 8 – **Image Window**

Manually Attaching Images

Images can be added manually in more than one method.

Case, Diagnosis, Specimen, Consult and Add-On images may all be added manually by the user. Case and Diagnosis Images are added via the **Add/Delete Menu** in the **Quick Case Window.**

Specimen Images (Gross, Micro or Other) are added by clicking the **Images Checkbox** in the **Quick Case Window.**

And Consult and Add-On Images may be added manually in the Consult and Add-Ons Windows, respectively.

Manually Adding Case and Diagnosis Images

1. Capture an image using an image capture system.

2. Edit the image using image editing software or an image management system.

3. Store the image in the Image or Consult Image folder on the fileserver.

4. Open **WindoPath**.

5. Click **Current Cases** on the **Dispatcher Window**.

6. Highlight the desired Case in the **Case List**.

7. Click **Open** to open the **Quick Case Window** for the selected Case.

8. Select **Case Image** or **Diagnosis Image** from the **Add/Delete Menu** to open the **Image List Window** OR the **Thumbnail Image View Window.**

9. Click **Add** to open the **Image Window**.

10. Click **Load Image** to open the standard file selection window.

11. Locate the image (.bmp or jpg file) in the folder you saved it in (Images or Consult Images) and click on it to select it.

12. Click **Open** on the standard file selection window.

13. The image now appears in the **Image Window**. Click **Annotate** if you would like to annotate the image. This will invoke Microsoft Paint or other image editing application.

14. Type the name of the image in the **Description (caption) field**.

15. Click **Done**. The image is now loaded into **WindoPath**. The image will either be listed in the **Image List Window** or viewable in the **Thumbnail Image View Window**.

16. Click **Done** to return to the **Quick Case Window.**

Manually Adding Specimen Images

1. Capture an image using an image capture system.

2. Edit the image using image editing software or an image management system.

3. Store the image in the Image or Consult Image folder on the fileserver.

4. Open **WindoPath**.

5. Click **Current Cases** on the **Dispatcher Window** (Click the desk file drawer if you are using the **Tool Bar** or **Office Dispatcher Window**).

6. Highlight the desired Case in the **Case List**.

7. Click **Open** to open the **Quick Case Window** for the selected Case.

8. Select the desired Specimen in the **Specimen List Box.**

9. Click the **Images Check Box** to open the **Image List Window** OR the **Thumbnail Image View Window.**

10. Click **Add** to open the **Image Window**.

11. Click **Load Image** to open the standard file selection window.

12. Locate the image (.bmp or jpg file) in the folder you saved it in (Images or Consult Images) and click on it to select it.

13. Click **Open** on the standard file selection window.

14. The image now appears in the **Image Window**. Click **Annotate** if you would like to annotate the image. This will invoke Microsoft Paint or other image editing application.

15. Type the name of the image in the **Description (caption) field**.

16. In the **Image Type Drop Down Field**, select either **Gross**, **Microscopic** or **Other**.

17. Click **Done**. The image is now loaded into **WindoPath**. The image will either be listed in the **Image List Window** or viewable in the **Thumbnail Image View Window**.

18. Click **Done** to return to the **Quick Case Window.** The **Images Check Box** now contains a checkmark.

Manually Adding Consult and Add-On Images

1. Capture an image using an image capture system.

2. Edit the image using image editing software or an image management system.

3. Store the image in the Image or Consult Image folder on the fileserver.

4. Open **WindoPath**.

5. Click **Current Cases** on the **Dispatcher Window** (Click the desk file drawer if you are using the **Tool Bar** or **Office Dispatcher Window**).

6. Highlight the desired Case in the **Case List**.

7. Click **Open** to open the **Quick Case Window** for the selected Case.

8. Click the **Consults Checkbox** and open the desired Consult in the **Consult List Window** or click the **Add-Ons Checkbox** and open the desired Add-On in the **Add-On List Window**.

9. Click the **Images Check Box** to open the **Image List Window**.

10. Click **New** (**Consult Window**) or **Add** (**Add-On Window**) to open the **Image Window**.

11. Click **Load Image** to open the standard file selection window.

12. Locate the image (.bmp or jpg file) in the folder you saved it in (Images or Consult Images) and click on it to select it.

13. Click **Open** on the standard file selection window.

14. The image now appears in the **Image Window**. Click **Annotate** if you would like to annotate the image. This will invoke Microsoft Paint or other image editing application.

15. Type the name of the image in the **Description (caption) field**.

16. Click **Done**. The image is now loaded into **WindoPath**. The image is listed in the **Image List Window**.

17. Click **Done** to return to the **Consult Window or Add-On Window**.

Automatically Attaching Images

There are three different, preference-driven methods available for automatic image attachment in WindoPath.

WindoPath can automatically attach images from Date-Labeled Folders. When a case is opened in the Quick Case Window, WindoPath will automatically attach any images that have been saved in the appropriate case or specimen image folder.

Automatic Embedded Image Capture allows the user to attach images to cases on demand during the process of image capture using the **Automatic Image Capture Hot Window.**

Automatic Batch Image Attachment allows users to save image files using a specific file naming convention in the **Automatically Captured Files Directory**, either individually or by the batch and then WindoPath will automatically move and save the image files into the correct case folder in the **Image Directory** every time the updater runs.

Automatically From Date-Labeled Folders

1. Set the reserved preference O227, **Automatically create image folders for cases**, to **True**.

2. Set the site wide preference O201, **Auto-attach images (with date labeled folders only)**, to **True**.

3. Whenever a Case is created, a folder for the Case is created in the Image Directory under the appropriate year and month folders.

4. Whenever a Specimen is created, a folder for the Specimen is created in the Specimen Images folder, labeled with the Specimen number/letter.

5. Whenever a Consult is created, a folder for the Consult is created in the Consult Images folder, labeled with the Consultor code.

6. At any time, images can be manually saved by the user in the Case folder, the Specimen Images subfolders or the Consult Images subfolders. **For quick access to the Image Directory for easier image saving, create a shortcut on your desktop to the Image Directory.**

7. When the **Quick Case Window** is opened, any images stored in the Case folder will be automatically attached to the first Specimen. Images stored in the Specimen Images subfolders will be automatically attached to the appropriate Specimen. Images stored in the Consult Images subfolders will be automatically attached to the appropriate Consult.

Automatic Image Capture (Hot Window)

1. Set the reserved preference O650, **Enable automatic image capture**, to **True**.

2. In the Site Wide Menu item **Default Section for Auto Image Capture**, define the default image section in the formatter that you would like to display the auto capture image in on the report.

3. Click **Current Cases** on the **Dispatcher Window**.

4. Highlight the desired Case in the **Case List**.

5. Click **Open** to open the **Quick Case Window** for the selected Case.

6. After capturing the image, save it in a Windows Explorer Window in the following location on the user's local PC: **<WindoPath root>\WindoPath Files\Captured Specimen Images\.** This is the **Hot Window.**

7. With the **Hot Window** open, click back on the **Quick Case Window.** You will notice that the saved image file jumps from the **Hot Window** onto the case in WindoPath with a simple click of the mouse in the **Quick Case Window.** This process should take no longer than 5 seconds.

8. The user can confirm that the image file has successfully been transferred from the local PC **Hot Window** folder to the open case in the **Quick Case Window** when the saved image file is no longer present in the **Hot Window**.

Automatic Batch Image Attachment

1. Set the reserved preference O667, **Enable auto batch attachments**, to **True**.

2. Set the reserved preference O201, **Auto-attach images (with date labeled folders only)**, to **True**.

3. Set the reserved preference O176, **Auto attach images (with date-labeled folders only)**, to **True**.

4. Save the image file in the **Automatically Captured Files Directory** using the required file-naming nomenclature:

    <prefix><year>_<case number>_<sequence letter>.<extension>

    - **<prefix> is a sequence of letters that specifies the case prefix.**
    - **<year> is either two or four digits that specifies the case year.**
    - **<number> is a sequence of digits that specifies the case number.**
    - **<sequence letter> is a single letter that specifies the order of the images on the report.**
    - **<extension> is .jpg for image files.**

    Example:

    S13_1234_A.jpg is the correct file name for case S2013-001234.

5. The next time the updater runs, WindoPath will check the **Automatically Captured Files Directory** to see if it contains any image files that need to be attached to cases. If any are found, WindoPath will attach the image file to the appropriate case image folder in the **Image Directory.**

6. If an error is encountered attaching a file to a case, the file will be renamed with an extension, **.rejected.<error message>** and it will remain in the **Automatically Captured** Files folder. This is so WindoPath will know to NOT process this file the next time the updater runs and so the user can tell an error has occurred.

7. If the file already exists in the date labeled folder for the case, the duplicate file will NOT save in the date labeled folder. It will remain in the **Automatically Captured Files** folder with a renamed extension.

Thumbnail Image View Window

With Preference O683, **Use thumbnails to view images**, set to **True**, WindoPath will display any Case, Diagnosis or Specimen Images attached to the case in a thumbnail view window rather than displaying images in an Image List Window.

The **Thumbnail Image View Window** (Figure 9) allows the user to view images as thumbnails and to easily edit image descriptions and rearrange image order. The **Thumbnail Image View Window** consists of a matrix of 12 image panes. Each pane displays a thumbnail view of a single image, the image description, the type of image and the image number.

If an image is added to a full Thumbnail Image View Window, the new added image will be displayed on the next page. When an image is deleted, all subsequent images, if any, will shift left.

Thumbnail Image Pane Fields and Buttons

- **Edit** – displays the full Image Window for the image.

- **Delete** – deletes the image.

- **Save** – saves any changes made to the description or type.

- **Print Checkbox** – if checked, the image will display on the report.

Thumbnail Image Window Buttons

- **Add –** The **Add button** displays the **Image Window.** The user may select an image as usual. The new image will then appear in the next available pane in the Thumbnail Window.

- **Next –** If the panes on the window are full and there are more images assigned, the **Next button** will be active. The user may press this button to move to the next set of 12 images. A number at the bottom of the window will indicate what page is being displayed.

- **Previous –** If the page is greater than 1, then the **Previous button** will be available to allow moving back to the previous page.

- **Done** – closes the **Thumbnail Image View Window**.
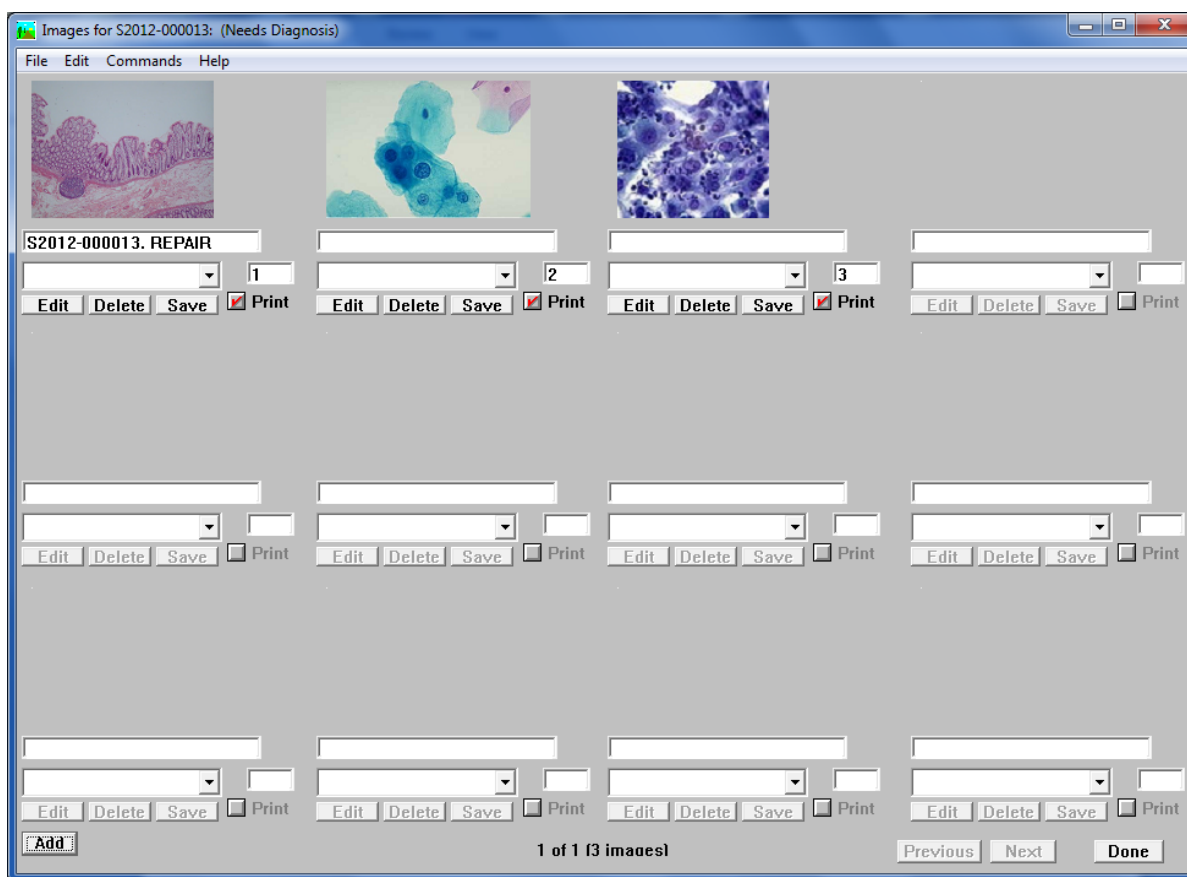
Figure 9 – **Thumbnail Image View Window**

Add-Ons

Add-Ons are signable items that can be associated with Cases or Specimens.

To enter an Add-On on a Specimen, highlight the desired Specimen in the **Specimen List Box** on the **Quick Case Window** and click the **Add-Ons check box**. The **Add-On List Window,** shown in Figure 10, opens. Click the **New Specimen button**. The **Add-On Window,** shown in Figure 11, opens.

To enter an Add-On on a Case, click the **Add-Ons check box** in the **Quick Case Window.** The **Add-On List Window** opens. Click the **New Case button**. The **Add-On Window,** shown in Figure 9, opens.

The **Add-On List Window** lists any Add-On items (frozen sections, instruments or signed supplemental reports) that have been entered on the Case or Specimen.

Add-On List Window
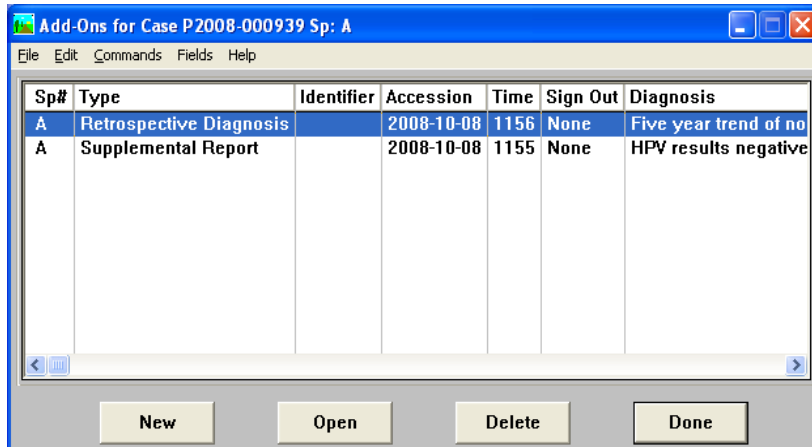
Figure 10 – **Add-On List Window**

Add-On List Window Columns

- **Sp#** – the Specimen number/letter (Specimen Add-Ons only).

- **Type** – the Add-On type (Frozen Section, Supplemental Report, etc.).

- **Identifier** – optional User-defined identifier for the Add-On.

- **Accession** – the date the Add-On was created.

- **Time** – the time the Add-On was created.

- **Sign Out** – the date the Add-On was signed out.

- **Diagnosis** – the Diagnosis/Interpretation of the Add-On.

- **Report** – the date the Add-On was reported.

Add-On List Window Action Buttons

- **New Case** – opens a blank **Add-On Window** to add a new Add-On to the Case.

- **New Specimen** – opens a blank **Add-On Window** to add a new Add-On to the Specimen.

- **Open** – opens the **Add-On Window** for the currently highlighted Add-On.

- **Delete** – deletes the currently highlighted Add-On.

- **Done** – closes the **Add-On List Window**.

Add-On Window

Figure 11 – **Add-On Window**

Add-On Window Fields

- **Source** – the Specimen source. This field is *read-only* and cannot be modified (Specimen Add-Ons only).

- **Pathologist** – the Pathologist assigned to the Add-On. For Case Add-Ons, the Pathologist assigned to the Case is automatically selected. To change the default Pathologist, delete all text from the field and follow the instructions for adding a Pathologist: Press **CTRL+L** in this field to display entries from the **Pathologist Library**. To select a Pathologist, highlight the name in the list and click **Select** or press **ENTER**.

- **Heading** – the selected Type.

- **Identifier** – optional text to identify the Add-On.

- **Accession** – fills in automatically with the accession date of the Add-On.

- **Sign Out** – fills in automatically with the sign out date of the Add-On.

- **Signer** – fills in automatically with the signer of the Add-On.

- **Typist** – fills in automatically with the typist of the diagnosis/interpretation.

- **Diagnosis/Interpretation** – the Diagnosis or interpretation of the Add-On. Press **CTRL+L** to display entries from the **Diagnosis Library**. You can also type free text in this field.

Add-On Window List Box

- **Images** – lists all images that have been associated with the current Add-On. Refer to the section entitled **Images** for more information.

Add-On Window Action Buttons

- **Cancel** – closes the **Add-On Window** without saving any changes.

- **Sign Out** – signs out the Add-On; only available if the current User's associated Pathologist is defined as a Signer. NOTE: If the selected type is **Retrospective Diagnosis**, this Add-On can be signed if the current User's associated Pathologist is defined as a Cyto Signer.

- **Sign All** – signs out ALL unsigned Add-Ons of the current type for all Specimens on the Case; only available if the current User's associated Pathologist is defined as a Signer. NOTE: If the selected type is **Retrospective Diagnosis**, this Add-On can be signed if the current User's associated Pathologist is defined as a Cyto Signer. The message **Sign out all signable Others for this Case** is displayed. Click **Yes** to sign out all signable items. Click **No** to cancel the operation.

- **Next** – opens the next Add-On in the **Add-On List**.

- **Done** – closes the **Add-On Window** saving any changes.

- **Delete** (**Table**) – deletes the table associated with the current Add-On.

- **Add** (**Images**) – opens a blank **Image Window** where a new image can be added to the Add-On.

- **Delete** (**Images**) – deletes the image highlighted in the **Image List Box**.

Add-On Window Check Boxes

- **Type** – the type of Add-On item. Select either **Frozen Section**, **Immediate Evaluation, Instrument, Intraoperative Consult, Other, Results, Retrospective Diagnosis** or **Supplemental Report** by clicking on the appropriate **radio button**.

- **Table** – opens the **Table List Window**, listing any tables that have been entered on the selected Add-On. Refer to the section entitled **Tables** for more information.

- **Note** – opens the **Note Window** where a note can be entered. Press **CTRL+L** to display entries from the **Paragraphs Library**. You can also type free text in this field.

*Data typed in the **Communicated Box** does not print on the final report. This information can be captured using BrioQuery only.*

- **Communicated** – flags the Add-On as having been reported to the appropriate personnel. Press **CTRL+L** to display entries from the **Paragraphs Library**. You can also type free text in this field.

Add-On Window Menu

Others Menu

- **Sign Out** – **ALT+X** – signs out the current Add-On; only available if the current User's associated Pathologist is defined as a Signer. NOTE: If the

selected type is **Retrospective Diagnosis**, this Add-On can be signed if the current User's associated Pathologist is defined as a Cyto Signer.

- **Unsign Out** – unsigns out the current Add-On.

- **Sign All** – signs out ALL unsigned Add-Ons of the current type for all Specimens on the Case; only available if the current User's associated Pathologist is defined as a Signer. NOTE: If the selected type is **Retrospective Diagnosis**, this Add-On can be signed if the current User's associated Pathologist is defined as a Cyto Signer. The message **Sign out all signable Others for this Case** is displayed. Click **Yes** to sign out all signable items. Click **No** to cancel the operation.

- **Set default type** – sets the currently selected Type as the default type for all subsequent Add-Ons.

Gross Description

Entering the gross description for Cases in **WindoPath** is usually a two-step process. The first is optional and involves the Pathologist's review of the Case in **WindoPath** while dictating the gross description to tape. Then the tape is given to the Transcriptionist who actually performs the entry of the gross description into **WindoPath**.

Filter the **Case List** to select those Cases that are at the status *Needs Gross*.

The **Case List** can also be filtered by Case type and Pathologist. Once the appropriate Cases are selected and listed in the **Case List**, highlight the bottom (or first) Case in the list. Double click the Case or click **Open** to open the **Quick Case Window**.

The Case is opened with the first Specimen highlighted in the **Specimen List Box.** Click the **Gross tab** where the gross description text is entered. Once the text becomes lengthy enough, scroll bars appear on the right so that the complete description can be viewed.

 Free text can be entered as the gross description or press **CTRL+L** to display entries from the **Paragraphs Library**. Multiple paragraphs can be selected at one time by clicking on each selection in the order that you want them. The entire interpretation is built in the bottom of the window. Refer to the following section entitled **Paragraph Selection Box** for more information.

A specific paragraph can be entered automatically by typing the pound sign (#) and the code for the paragraph and pressing **CTRL+L**.

CTRL+I is used to move the cursor to fill-in-blanks that can be stored in the canned paragraphs.

Bolding and italics can be turned on or off by highlighting the desired text and using the following commands:

- **ALT+B** – defines bold text.

- **ALT+I** – defines italic text.

- **ALT+CTRL+B** – defines bold italic text.

- **ALT+U** – defined underlined text.

- **ALT+N** – defines normal text.

If a Case has more than one Specimen, highlight the next Specimen in the **Specimen List Box** to open the **Gross tab** for the next Specimen on the Case.

Click **Next** in the **Quick Case Window** to open the next Case for gross description entry.

Once the gross description has been entered for **each** Specimen on a Case, the Case *Needs* advance to *Needs Microscopic* (if the preference to require Micro entry is set to **True**) or to Needs *Diagnosis*. If canned paragraphs containing underscores have been selected, each underscore must be filled in before the Case *Needs* will advance from *Needs Gross*.

The Case is flagged for Procedures if profiles have been ordered.

Figure 12 shows the **Quick Case Window** after a gross description has been entered.

Figure 12 - **Quick Case Window** *with gross description*

Paragraph Selection Box

The **Paragraphs Library** is a collection of canned paragraphs that can be used in reporting a variety of information. These **Paragraphs** can be defined so that multiple paragraphs strung together make up the complete gross description, for example. Whenever **CTRL+L** is pressed in a field or tab that accesses **Paragraphs**, the **Paragraph Selection Box**, shown in Figure 13, opens.
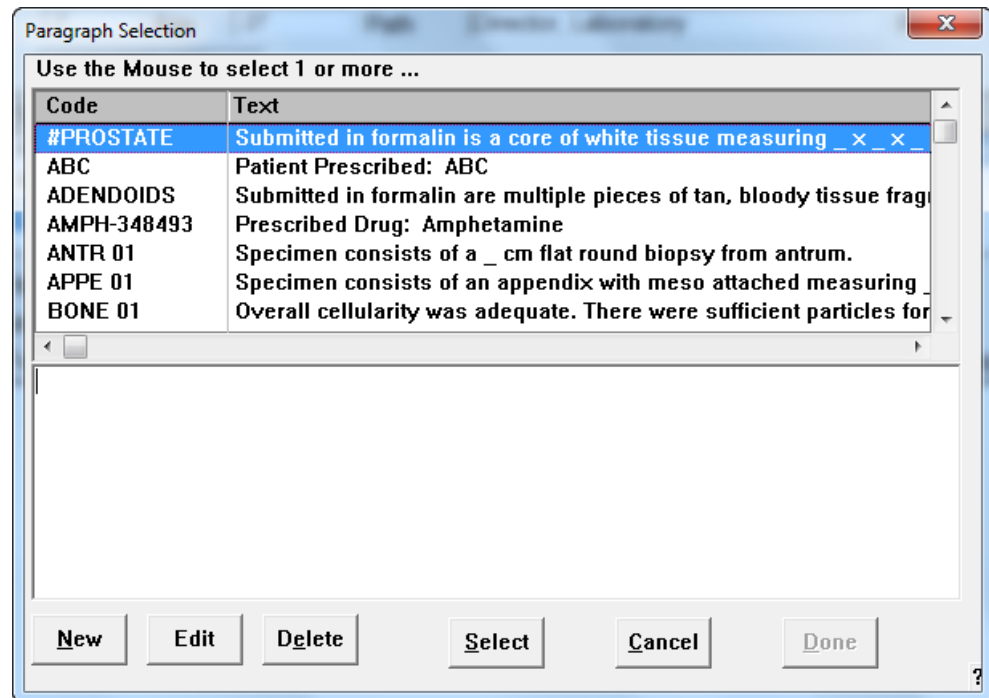
Figure 13 – **Paragraph Selection Box**

You can select multiple paragraphs to make up the report by double clicking on one quotation after the other, in the order that you want them. You can also single click on a quotation, then click **Select**. Click **Done** to enter the selected text in the **Quick Case Window**. Once the selected text is in the **Quick Case Window**, it can be modified by using any of the text editing commands.

To cancel selection of **Paragraphs**, click **Cancel**.

To create new entries in the **Paragraphs Library**, click **New**. The **Paragraphs Library** is described in *Chapter 11 – The Library*.

Tables

The Tables feature allows formatted tables to be associated with Specimens or Diagnoses in the **Quick Case Window**, with Add-Ons in the **Add-On Window** or with Procedure Results in the **Procedure Result Window.**

Predefined table formats can be built in the **Tables Library**. Tables specific to individual Specimens, Diagnoses or Add-Ons can be built on the fly from the **Quick Case Window** or **Add-On Window**. Refer to *Chapter 11 – The Library* for more information about building tables. Only one table can be associated with each Specimen, Diagnosis or Add-On.

Adding a Table

To add a Specimen table: From the **Quick Case Window**, highlight the desired Specimen in the **Specimen List Box**, then select a Specimen level tab (ex. Gross). Select *Add Table* from the *Add/Delete Menu* to open the **Table List Window**.

To add a Diagnosis table: From the **Quick Case Window**, highlight the desired Diagnosis in the **Diagnosis List Box**, then select a Diagnosis level tab (ex. Diag). Select *Add Table* from the *Add/Delete Menu* to open the **Table List Window**.

To add an Add-On table: From the **Add-On Window**, click the **Table check box** to open the **Table List Window**.

To add a Procedure Result table: From the **Procedures Window**, highlight the desired procedure in the **Procedures Window** and double click it to open the **Procedure Results Window.** Click the **Table check box** to open the **Table List Window**.

To select a library entry, highlight it and click **Select** or press **ENTER**. The formatted table is displayed in the **Table Window**, shown in Figure 14. Fill in the appropriate variable data and click **Done**.

You may type beyond the right border of each cell. Text will wrap on reports.

To navigate between cells, type **TAB** to move right; type **SHIFT+TAB** to move left; type **ENTER** to move down; type **SHIFT+ENTER** to move up.

Figure 14 – **Table Window**

Modifying a Table

From the **Quick Case Window**, highlight the appropriate Specimen in the **Specimen List Box** or the Diagnosis in the **Diagnosis List Box**. Select *Table* from the *Modify Menu* to open the **Table Window**.

From the **Add-On Window**, click the **Table check box**.

Make any desired changes to the table and click **Done**.

Deleting a Table

From the **Quick Case Window**, highlight the appropriate Specimen in the **Specimen List Box** or the Diagnosis in the **Diagnosis List Box**. Select *Delete Table* from the *Add/Delete Menu.*

From the **Add-On Window**, click **Delete**.

At the prompt **Really delete table**, click **Yes** to delete the table. Click **No** to cancel the operation.

Documents

The Documents feature allows various types of documents to be associated with a Case in the Quick Case Window or with a Consult in the Consult Window. These documents can be text files, diagrams, audio/visual files or any other type of file.

In order for documents to be accessible to all Users, documents should be stored in a shared folder on the fileserver. The Case Document and Consult Document folders should be specified from the **Preference List Window** – *Site Wide Menu* – **Directories** menu item.

From the **Quick Case Window**, select *Case Documents* from the *Add/Delete Menu* to open the **Document List Window**, shown in Figure 15.

From the **Consult Window**, click the **Documents check box**.

Document List Window
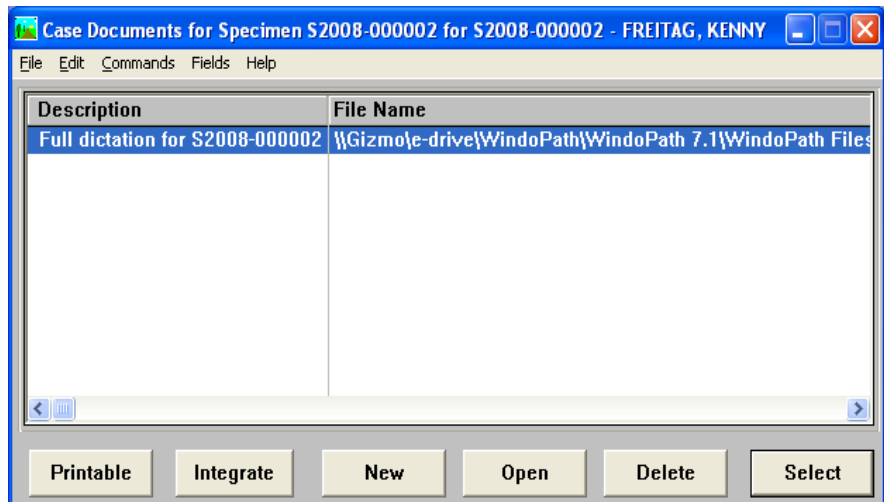
Figure 15 – **Document List Window**

Document List Window Columns

- **Description** – the User-defined description of the document.

- **File Name** – the location where the file is stored.

- **Print** – displays **True** if the document has been flagged for printing.

- **Integrated** – displays **True** if the document has been integrated as a Specimen or Consult image.

Document List Window Action Buttons

- **Printable** – sets the **True**/**False** flag for the document's print status. Documents flagged as printable will print when the Case report is printed.

- **Integrate** – sets the **True**/**False** flag for the document's integration status. Documents flagged as integrated are converted to a .jpg and associated with the Case as a Case or Consult image.

- **New** – opens the standard file selection window to allow selection of the document to be associated with the Case or Consult.

- **Open** – opens the document highlighted in the list.

- **Delete** – deletes the document highlighted in the list.

- **Select** – closes the **Document List Window**.

Adding a Document Manually

From the **Quick Case Window**, select *Case Documents* from the *Add/Delete Menu* to open the **Document List Window**, shown in Figure 15.

From the **Consult Window**, click the **Documents check box**.

Click **New** to open the standard file selection window. Navigate to the appropriate file and click **Open**. In the **Enter description** field, enter a file name for the document and click **Done**. Respond **Yes** or **No** to the **Print along with case report** prompt. The document is now listed in the **Document List Window**.

Modifying a Document

From the **Quick Case Window**, select *Case Documents* from the *Add/Delete Menu* to open the **Document List Window**, shown in Figure 15.

From the **Consult Window**, click the **Documents check box**.

Highlight the appropriate document in the **Document List Window** and click **Open**. Make any desired changes to the document, save the changes and close the document.

Deleting a Document

From the **Quick Case Window**, select *Case Documents* from the *Add/Delete Menu* to open the **Document List Window**, shown in Figure 15.

From the **Consult Window**, click the **Documents check box**.

Highlight the appropriate document in the **Document List Window** and click **Delete**.

Adding a Document Automatically

There are several different, preference-driven methods for automatic document attachment in WindoPath.

WindoPath can automatically attach documents from Date-Labeled Folders. When a case is opened in the Quick Case Window, WindoPath will automatically attach any documents that have been saved in the appropriate case documents folder. Documents stored in the Consult Documents subfolders will be automatically attached to the appropriate Consult.

Automatic Document Capture allows the user to attach documents to cases on demand using the **Automatic Capture Hot Window**.

Automatic Batch Document Attachment allows users to save documents using a specific file naming convention in the **Automatically Captured Files Directory**, either individually or by the batch and then WindoPath will automatically move and save the case or consult document into the correct case folder in the **Image Directory** every time the updater runs.

Adding a Document Automatically from Date Labeled Folders

1. Set the reserved preference O227, **Automatically create image folders for cases**, to **True**.

2. Set the site wide preference O201, **Auto-attach images (with date labeled folders only)**, to **True**.

3. Whenever a Case is created, a folder for the Case is created in the Image Directory under the appropriate year and month folders. Case Documents and Consult Documents subfolders are also created.

4. Whenever a Consult is created, a folder for the Consult is created in the Consult Documents folder, labeled with the Consultor code.

5. Documents can be placed in the Case Documents or the Consult Documents subfolders.

6. When the **Quick Case Window** is opened, any documents stored in the Case Documents folder will be automatically attached to the Case. Documents stored in the Consult Documents subfolders will be automatically attached to the appropriate Consult.

Automatic Batch Document Attachment

1. Set the reserved preference O667, **Enable auto batch attachments**, to **True**.

2. Set the reserved preference O201, **Auto-attach images (with date labeled folders only)**, to **True**.

3. Set the reserved preference O176, **Auto attach images (with date-labeled folders only)**, to **True**.

4. Save the document in the **Automatically Captured Files Directory** using the required file-naming nomenclature:

   <prefix><year>_<case number>_<sequence letter>.<extension>

   - **<prefix> is a sequence of letters that specifies the case prefix.**
   - **<year> is either two or four digits that specifies the case year.**
   - **<number> is a sequence of digits that specifies the case number.**
   - **<sequence letter> is a single letter that specifies the order of the images on the report.**
   - **<extension> is .jpg for image files.**

   Example:

S13_1234_A.pdf is the correct file name for case S2013-001234.

5. The next time the updater runs, WindoPath will check the **Automatically Captured Files Directory** to see if it contains any document files that need to be attached to cases. If any are found, WindoPath will attach the document to the appropriate case document folder in the **Image Directory.**

6. If an error is encountered attaching a document to a case, the file will be renamed with an extension, **.rejected.<error message>** and it will remain in the **Automatically Captured** Files folder. This is so WindoPath will know to NOT process this file the next time the updater runs and so the user can tell an error has occurred.

8. If the file already exists in the date labeled folder for the case, the duplicate file will NOT save in the date labeled folder. It will remain in the **Automatically Captured Files** folder with a renamed extension.

Chapter 5 – Case Procedures & Profiles

Procedures & the Procedure List Window Overview

Procedures and Profiles can be automatically ordered at accession or manually ordered after accession. Cases needing Procedures can be at any status (*Needs*) and will be marked with a flag (¬) as a super subscript in the Needs column of the **Case List**.

Also referred to as the **Histology Window**, the Procedure List Window can be used to perform a variety of tasks in WindoPath:

- Adding, Editing and Deleting Profiles and Procedures to cases.

- Advancing Profile and Procedure Statuses.

- Resulting molecular and clinical procedures.

- Printing Profile, Procedure and QC labels.

- Printing worklists.

The Procedure List Window contains a scrolling list box that lists all currently selected procedures. The drop down fields above the list box allow the user to filter the Procedure List in a variety of combinations so that only the information desired will be viewed. The procedures window may be filtered for the user to perform any of the tasks listed above.

The **Procedure List Window** can be opened from the **Case List Window**, the **Quick Case Window** or the **Accession Window**.

From the Case List Window

Hold the **CTRL** key and click on the Cases on which you would like to add profiles (a collection of procedures) or press **CTRL+A** to select all Cases. Click **Procedures** to open the **Procedure List Window** (Figure 1).

If the Cases you selected already have profiles ordered on one or more Specimens, the procedures on those profiles will be listed on the procedure list in the main body of the **Procedure List Window**. These Cases will be listed in the **Case field** in the upper left corner of the **Procedure List Window**.

To add new profiles to a Case and Specimen, click the down arrow next to the **Case field** and click on the Case number. Click the down arrow next to the **Spec. field** and click on the Specimen letter/number. Click on the down arrow under the **Designation field** and select a designation for the profile (*Example*: **BLK**). Click the down arrow under the **Profile field**, click on a profile type and enter the number of profiles by typing the number in the number field or by using the up/down arrows. Click **Add** to

order profiles and their associated procedures. The ordered procedures will appear in the procedure list.

To add a single additional procedure to a previously ordered profile, highlight the profile(s) in the procedure list, click the down arrow next to the **Procedure field** and select a procedure. Click **Add** and the procedure will be added to the profile(s) you selected.

To add multiple additional procedures to a previously ordered profile, highlight the profile(s) in the procedure list and click **Add+**. Hold the **CTRL** key and click on the desired procedures in the list. Click **Done** and the procedures will be added to the profile(s) you selected.

From the Quick Case Window

Click **Proc.*** or press **ALT+R** to open the **Procedure List Window** (Figure 1). You will be able to add profiles to all Specimens on the Case.

From the Accession Window

Select *Procedures* from the *Case Menu* or press **ALT+R** to open the **Procedure List Window** (Figure 1). You will be able to add profiles to all Specimens on the Case.

Select *Procedures* from the *Specimen Menu* or press **ALT+SHIFT+R** to open the **Procedures List Window** (Figure 1). You will be able to add profiles only on the highlighted Specimen on the Case.

Procedure List Window

Procedure List Window Columns

- **Case** – the Case number.

- **S** – the Specimen designation, either a letter or a number.

- **Designation** – the type of profile selected from the **Profiles Library**.

- **Profile** – the profile designation followed by the number of the profile. Profile designations are pre-defined in the **Phrases Library.**

- **Pcs** – the number of pieces on the profile.

- **Procedure** – the procedure code.

- **Status** – the current processing step of the procedure.

- **B. Status –** the current block status of the procedure.

- **Slds** – the number of slides created or to be created for this procedure. The default slide count for each procedure is defined in the **Procedures Library**.

Figure 1 – **Procedure List Window**

- **Com** – If comments or instructions have been entered on a particular profile or procedure, this column is marked with an X.

- **Work** – the workgroup associated with the procedure.

- **O. By** – the initials of the User who ordered the procedure.

- **P. By** – the initials of the User who last advanced the status of the procedure.

- **Result** – for clinical procedures, the diagnosis/result.

- **Flag** – for clinical procedures, the flag (high/low).

- **Text** – the text result.

- **Range** – for clinical procedures, the normal range for the specified procedure.

- **Name** – the Patient's name.

- **Rack** – the rack in which the specimen is stored.

- **Created** – the date/time the procedure was created.

- **Needs Call** – if the test result warrants a call, **True** or **False**.

- **Overdue** – if the test is marked overdue, **True** or **False**.

- **Ordered As** – the Profile the test was ordered in.

- **Seq**. # – the order the Profile will display in.

- **Used** – entered by the Pathologist during sign out (and preference driven), this column displays a **True** or **False** value indicating whether or not the procedures ordered were actually used to render a diagnosis for billing purposes.

- **Reported** – date reported.

- **Reflexed** – if the test has a reflex test ordered, **True** or **False**.

- **Printed At** – displays the date/time that each procedure result was printed.

- **Col**. – displays **True** when there is a specimen collection message for the procedure.

- **Signer** – signer of procedure.

- **Priority** – priority of test.

- **Perf**. Loc. – Performing Location of test.

- **Bill** – Bill Type.

Procedure List Window Drop Down Fields

- **Case** – the Case number of the highlighted procedure on the procedures list.

- **Spec.** – the Specimen of the highlighted procedure on the procedures list.

- **Block** – The block number or letter of the highlighted procedure on the procedures list.

- **Wrk Grp** – the Work Group filter.

- **Profile** – the profile designation of the highlighted procedure on the procedures list.

- **Procedure** – the Procedure filter.

- **Status** – the Status filter.

- **Prior**. – The priority of the highlighted procedure on the procedures list.

- **Perf**. – The performing location of the highlighted procedure on the procedures list.

- **Bill Type** – The bill type of the highlighted procedure on the procedures list.

Procedure List Window Action Buttons

- **Selected Procedures** – click the left double arrows to revert to the previous processing status for all selected (highlighted) procedures. Click the right double arrows to advance to the next processing status for all selected (highlighted) procedures (Example: From **START** to **FINISH**).

- **Listed Procedures** – click the left double arrows to revert to the previous processing status for all listed (highlighted) procedures. Click the right double arrows to advance to the next processing status for all listed (highlighted) procedures (Example: From **FINISH** to **START**).

Procedure List Window Menus

Case Menu

- *Load Case* – **CTRL+K** – opens the **Case Number Entry Box** where the number of the next Case to be opened can be entered. Enter the complete

Case number you wish to search for and click **OK**. If a Case with that number is found, the **Procedure List Window** for that Case is opened.

- *Show Case* – opens the **Quick Case Window** for the Case listed in the **Case field**.

Profiles Menu

- *Edit Profile* – **CTRL+ALT+L** – opens the **Profile Window** where you can edit profile information for the currently selected profile.

- *Enter Profile Code* – **CTRL+SHIFT+K** – allows you to free type the code and the designation of the Profile you want added to the selected specimen.

- *Add Profiles* – **ALT+L** – adds a profile of the selected type from the Profile Menu to the procedure list. To add more than one profile of this type, enter the appropriate number in the Count field before selecting the menu item.

- *Delete Profile(s)* – deletes the selected profile(s) from the procedure list.

- *Delete Block Highlighted in Block Menu* – deletes the currently highlighted profile and opens a reason box to enter reason for cancellation.

- *Print Cassettes (Interface)* – updates the cassette status of the selected profile(s), sending the profile data to the cassette labeler interface (if installed).

- *Rack and Slot* – opens an info box that displays any rack and slot information for the currently highlighted profile.

- *Order* – toggle switch will set the **Block Status** of the currently highlighted profile to **Ordered**.

- *Gross* – toggle switch will set the **Block Status** of the currently highlighted profile to **Gross**.

- *Embed* – toggle switch will set the **Block Status** of the currently highlighted profile to **Embedding**.

- *Cut* – toggle switch will set the **Block Status** of the currently highlighted profile to **Cut**.

- *Count Diff* – opens the Count Diff Window.

- *Set Bill Type* – opens a drop down menu displaying items from the Phrases Library, Bill Type box for the user to set a bill type.

- *Set Performing Location* – opens a drop down menu displaying items from the Phrases Library, Performing Location box for the user to set a performing location.

- *Set Priority* – opens a drop down menu displaying items from the Phrases Library, Priority box for the user to set a priority.

Procedures Menu

- *Increment Selected* – **ALT+T**– advances to the next processing step for the selected (highlighted) procedures (example: from **START** to **FINISH**).

- *Decrement Selected* – **ALT+SHIFT+T** – reverts to the previous processing step for the selected (highlighted) procedures (example: from **FINISH** to **START**).

- *Increment List* – **CTRL+M** – advances to the next processing step for all listed procedures (example: from **START** to **FINISH**).

- *Decrement List* – **CTRL+SHIFT+M** – reverts to the previous processing step for all listed procedures (example: from **FINISH** to **START**).

- *Edit Procedure* – **ALT+P** – opens the **Procedure Window** where you can edit procedure information for the currently selected procedure.

- *Add Procedure* – adds the procedure listed in the **Procedure field** to the selected profile on the procedure list.

- *Delete Procedure(s)* – deletes the selected procedure(s) from the procedure list.

- *Go to Top* – **CTRL+ALT+G** – highlights the first procedure in the list.

- *Clear Selections* – removes highlighting from the procedure list so that no procedures are selected.

- *Abnormals Only* – toggle switch that filters the list to include profiles that are marked **abnormal**.

- *Include Clinical* – toggle switch that filters the list to include profiles that are marked **Clinical**.

- *Include Histology* – toggle switch that filters the list to include profiles that are non-Clinical or Histology.

- *Incomplete Procedures Only* – toggle switch for displaying only incomplete procedures (procedures that have not reached the last processing status, e.g. **FINISH**) on the procedure list.

- *Reset Menus* – removes all filters from the procedure list and returns to the complete list of procedures.

- *In House Only* – toggle switch that filters the list to include profiles that are marked **In house**.

- *Send Outs Only* – toggle switch that filters the list to include profiles that are marked **Send Outs**.

- *Unlabeled Procedures Only* – toggle switch for displaying only unlabeled procedures (procedures for which labels have not yet been printed) on the procedure list.

- *Collection Message – opens a text box to enter a collection message for the currently highlighted procedure.*

- *Sent to Stainer (Interface)* – updates the stainer status of the selected procedure(s), sending the procedure data to the autostainer interface (is installed).

- *Rack and Slot* – opens an info box that displays any rack and slot information for the currently highlighted procedure.

- *Enter Result into Selected Procedures* – opens a small box to input the result of the currently highlighted procedure.

Labels Menu

- *Print/Generate QC Labels* - **CTRL+SHIFT+Q**- opens the **QC Label Window** shown in Figure 3.

- *Print Labels For Selected Procedures* – prints labels for all procedures highlighted on the procedure list.

- *Preview Labels for Selected Procedures* – opens the **Print Preview Window** displaying the labels for selected procedures on the procedure list.

- *Print Slide Label (Interface)* – updates the slide status of the selected procedure(s), sending the procedure data to the slide labeler interface (if installed).

- *Print Labels for Selected Blocks* – prints labels for all blocks highlighted in the procedure list.

- *Preview Labels for Selected Blocks* – opens the **Print Preview Window** displaying the labels for selected blocks on the procedure list.

Worklists Menu

- *Print Worklist for Selected Procedures* **–** opens the standard print window to print a worklist for all procedures highlighted in the procedure list. The worklist is printed in order by procedure code.

- *Print Worklist by Case Number* – opens the standard print window to print a worklist for all procedures highlighted in the procedure list. The worklist is printed in order by Case number.

- *Print Worklist by Profile* – opens the standard print window to print a worklist for all profiles highlighted in the procedure list. The worklist is printed in order by profile.

- *Preview Worklist for Selected Procedures* – opens the **Print Preview Window** displaying the worklist for selected procedures on the procedure list. The worklist is printed in order by procedure code.

- *Preview Worklist by Case Number* – opens the **Print Preview Window** displaying the worklist for selected procedures on the procedure list. The worklist is printed in order by Case number.

- *Preview Worklist by Profile* – opens the **Print Preview Window** displaying the worklist for selected profiles on the procedure list. The worklist is printed in order by profile.

- *Print Completes on Worklists* – this toggle switch determines whether worklists will include procedures that have reached their final status, along with those that are incomplete. If there is a checkmark next to the menu item, the worklist will include procedures that have reached their final status. If there is no checkmark next to the menu item, only incomplete procedures will print on the worklist. To change the preference, click on the menu item.

Adding Profiles

Ordering Profiles

Profiles can be ordered automatically at the time the Specimen is created or manually from the **Procedure List Window**. Refer to *Chapter 9 – The Library* to implement automatic profile ordering from the **Source Library**.

To order profiles manually from the **Procedure List Window**:

1. Highlight the desired Case(s) in the **Case List Window** and click **Procedures** to open the **Procedure List Window**. Click the **Case field** in the upper left corner of the **Procedure List Window** to select the Case on which you would like to order profiles. Click the **Spec. field** to select the Specimen.

2. Click the **Profile Drop-Down Order Menu** to select a profile type.

3. Click the **Designation Drop-Down Order Menu** to select a profile designation.

4. Type the number of profiles in the **Count Field** or use the up/down arrows to select the number of profiles.

5. Click **Add** to the left of the **Count field** or select *Add Profile(s)* from the *Profiles Menu* or press **ALT+L** to add the profiles and their associated procedures to the procedure list.

6. If the User preference **Prompt for pieces when assigning profiles/slides** is set to **True**, the **Pieces Box** will open, allowing you to enter the number of pieces for the profile. (You can type numbers or letters in this field.) Enter the number of pieces and click **OK**. If you ordered more than one profile, the dialog box will appear allowing you to enter the number of pieces for each subsequent profile. Continue to enter the number of pieces and click **OK** until pieces for all profiles have been entered.

Adding Comments to Profiles

1. Highlight the profile on the procedure list or click the **Profile field** and select the profile on which you would like to add a comment.

2. Select *Edit Profile* from the *Profiles Menu* to open the **Profile Window** or type **CTRL+ALT+L**.

3. Type your comment for the profile in the **Internal Comment** field or press **CTRL+L** to display entries from the **Phrases Library – Profile Comment Box**.

Adding Special Instructions to Profiles

1. Highlight the profile on the procedure list or click the **Profile field** and select the profile on which you would like to add special instructions.

2. Select *Edit Profile* from the *Profiles Menu* to open the **Profile Window** or type **CTRL+ALT+L**.

3. Type your special instructions for the profile in the **Instructions field** or press **CTRL+L** to display entries from the **Phrases Library – Profile Instructions Box**.

Editing Profiles

1. Highlight the profile on the procedure list or click the **Profile field** and select the profile you would like to edit.

2. Select *Edit Profile* from the *Profiles Menu* to open the **Profile Window** or type **CTRL+ALT+L**.

3. From this window, you can edit the profile designation, number of pieces, profile comment or profile special instructions. The profile type and number

of profiles cannot be edited in this window. If these are incorrect, delete the profile and add the correct profile.

You can also edit profile information while editing procedures by selecting *Edit Procedure* from the *Procedures Menu*.

Deleting Profiles

1. Highlight any of the procedures on the profile(s) you wish to delete in the procedure list or click the **Profile field** in the upper left corner of the **Procedures Window** and select the profile(s) you wish to delete.

2. Select *Delete Profiles* from the *Profiles Menu*.

3. The profile(s) will be deleted from the procedure list.

Adding Procedures

Adding a Single Procedure to a Single Profile

1. Highlight the profile on the procedure list or click the **Profile field** and select the profile on which you would like to add a procedure.

2. Click the **Procedure Drop-Down Order Menu** to the right of the window to select the procedure you would like to add.

3. Click **Add** to the left of this field or select *Add Procedure* from the *Procedures Menu*. The procedure will be added to the selected profile.

Adding a Single Procedure to Multiple Profiles

1. In the Procedure List, highlight the profiles on which you would like to add a procedure.

2. Click the **Procedure Drop-Down Order Menu** to the right of the window to select the procedure you would like to add.

3. Click **Add** to the left of this field or select *Add Procedure* from the *Procedures Menu*. The procedure will be added to the selected profiles.

Adding Multiple Procedures to a Single Profile

1. Highlight the profile on the procedure list or click the **Profile field** and select the profile on which you would like to add procedures.

2. Click the **Add+ button** to the right of the window to display the complete list of available procedures.

3. Click on each procedure to be added to the selected profile.

4. Click **Done**. The procedures will be added to the selected profile.

Adding Multiple Procedures to Multiple Profiles

1. In the Procedure List, highlight the profiles on which you would like to add a procedure.

2. Click the **Add+ button** to the right of the window to display the complete list of available procedures.

3. Click on each procedure to be added to the selected profile.

4. Click **Done**. The procedures will be added to the selected profiles.

Adding Profile-specific Procedures to a Single Profile

1. Highlight the profile on the procedure list or click the **Profile field** and select the profile on which you would like to add the **profile-specific procedures** or **panel set**.

2. Click the **Procedure Drop-Down Order Menu** to the right of the window to select the profile of procedures that you would like to add. These items appear in the drop down menu with **Prof:** preceding the procedure name (Example: Prof: Liver).

3. Click **Add** to the left of this field or select *Add Procedure* from the *Procedures Menu*. The procedure will be added to the selected profile. What this will do is add all of the procedures included in that profile to the highlighted profile WITHOUT adding an additional block to the specimen.

Editing Procedures

1. Highlight the procedure(s) that you wish to edit on the procedure list.

2. Double click the highlighted procedure or select *Edit Procedure* from the *Procedures Menu* or type **ALT+P** to open the **Procedure Result Window** shown in Figure 2.

3. From this window, you can edit the status, number of slides, procedure comment, clinical results, QC flag and QC reason, add/delete a table or result molecular and clinical procedures.

Deleting Procedures

1. Highlight the procedure(s) that you wish to delete on the procedure list.

2. Select *Delete Procedure(s)* from the *Procedures Menu*.

3. The highlighted procedure(s) will be deleted from the procedure list.

Procedure Result Window

Molecular Procedures and Clinical Procedures are resulted in the Procedure Result Window, shown in Figure 2. All Procedures can be edited, signed out and advanced in the Procedure Result Window.

Figure 2 – **Procedure Result Window**

Procedure Result Window Fields

- **Status** – the current processing status of the procedure.

- **Work Group** – the work group associated with the procedure.

- **Slides** – the number of slides for the procedure.

- **Performed By/On** – the User who last advanced the status of the procedure and the date.

- **Comment** – an optional comment associated with the procedure. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library** – **Procedure Comment Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Instructions** – optional instructions associated with the profile. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library** – **Profile Instructions Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Internal Comment** – an optional comment associated with the profile. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library** – **Profile Comment Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Result (Result, Flag, Range, Reported, Delta Check, Text Result)** – for clinical procedures, the result, flag, range, reported and delta check. For text results, you can type free text in the un-labeled field below the **Result Field** or press **CTRL+L** to display entries from the **Diagnosis Library**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- *Result Text (read only)* – canned default read-only text associated with the current procedure in the Procedures Library.

- *Report Info* – when the User enters a critical clinical result, this field is used to enter notations.

- *Reason* – after indicating the QA adequacy of the current Procedure using one of the three **QC radio buttons**, this field is for the User to enter the **QC Reason**. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library** – **QC Reason Box**.

Procedure Window Action Buttons

- **Delete (Table)** – deletes the table associated with the procedure.

- **Result All** – not used.

- **Next** – opens the **Procedure Window** for the next procedure in the procedure list.

- **Previous** – opens the **Procedure Window** for the previous procedure in the procedure list.

- **Sign** – if the currently highlighted procedure requires a signature, the **Sign button** will become available.

- **Cancel** – closes the **Procedure Window** without saving any changes.

- **Done** – closes the **Procedure Window**, saving any changes.

Procedure Window Check Box

- **Table** – opens the **Table Library**, where a table can be added to the procedure. Tables are discussed earlier in the chapter.

Procedure Window Radio Buttons

- **Satisfactory** – flags the QC status of the procedure as satisfactory.

- **Less Than Opt**. – flags the QC status of the procedure as less than optimum.

- **Unsatisfactory** – flags the QC status of the procedure as unsatisfactory.

Procedure Result Window Menu

Procedure Menu

- *Latest Correction Reason* – not used.

- *Show Profile* – opens the **Profile Window** for the current profile.

- *Evaluate a Reflex Rule* – opens the **Reflex Rule Code List Box**, allowing the user to select and then evaluate a pre-define Reflex Rule from the Reflex Tests Library.

- *Show Clinical Test Code* – opens the **Clinical Test Code Window** for the current procedure, if it is associated with a clinical code.

- *Show Patient* – opens the **Patient Window** for the current Patient.

- *Show Positive Reflex Rules* – If the pending diagnosis would invoke a Reflex Rule upon sign out, the window that opens will display which rule expected to be invoked upon sign out.

- *Show Range Data* – opens the **Case Range Data Dialog**.

- *Sign Out* – if the currently highlighted procedure requires a signature, the **Sign button** will become available. Click this menu item to also sign out a procedure.

- *Unsign Out* – click to unsign out a procedure.

Previewing & Printing Worklists

The Procedures Window may be filtered by the user to generate and print different worklists by Selected Procedure, by Case Number, by Profile or by Completes. The formats of these worklists are hard-coded and may not be modified by the user.

Previewing Worklists

1. Filter the **Case List** to *Needs Procedures*.

2. Press **CTRL+A** to select all Cases.

3. Click **Procedures**.

4. The **Procedure List Window** (Figure 1) opens.

5. Using the **Procedure List Window Drop-Down Filter Fields,** filter the list box so that only the information desired is displayed.

6. Highlight all of the rows displayed in the list box by hitting **CTRL+A**.

7. To **Preview** a worklist, select one of the 3 preview items listed in the **Worklists Menu: Preview Worklist for Selected Procedures**, **Preview Worklist by Case Number** or **Preview Worklist by Profile**.

Printing Worklists

1. Filter the **Case List** to *Needs Procedures*.

2. Press **CTRL+A** to select all Cases.

3. Click **Procedures**.

4. The **Procedure List Window** (Figure 1) opens.

5. Using the **Procedure List Window Drop-Down Filter Fields,** filter the list box so that only the information desired is displayed.

6. Highlight all of the rows displayed in the list box by hitting **CTRL+A**.

7. To **Print** a worklist, select one of the 4 print items listed in the **Worklists Menu: Print Worklist for Selected Procedures**, **Print Worklist by Case Number** or **Print Worklist by Profile**.

8. To print a worklist including completed procedures, select the **Print Completes on Worklists** toggle item in the Worklist Menu and then repeat step 7 above.

Previewing & Printing Procedure Labels

Previewing Procedure Slide Labels

1. Filter the **Case List** to *Needs Procedures*.

2. Press **CTRL+A** to select all Cases.

3. Click **Procedures**.

4. The **Procedure List Window** (Figure 1) opens.

5. Using the **Procedure List Window Drop-Down Filter Fields,** filter the list box so that only the information desired is displayed.

6. Highlight all of the rows displayed in the list box by hitting **CTRL+A**.

7. To **Preview** Procedure Labels, select the **Preview Labels for Selected Procedures** menu item from the **Labels Menu.**

Printing Procedure Slide Labels

1. Filter the **Case List** to *Needs Procedures*.

2. Press **CTRL+A** to select all Cases.

3. Click **Procedures**.

4. The **Procedure List Window** (Figure 1) opens.

5. Using the **Procedure List Window Drop-Down Filter Fields,** filter the list box so that only the information desired is displayed.

6. Highlight all of the rows displayed in the list box by hitting **CTRL+A**.

7. To **Print** Procedure Labels, select the **Print Labels for Select Procedures** menu item from the **Labels Menu.**

8. If there is more than one Procedure Slide Label Format defined in the Formatter, a drop-down menu of procedure label formats is displayed. Click on the desired format and click **Done.**

9. The Label Start Prompt is displayed. Enter the row and column where the first label should print on the stock or enter a starting label number. Click **Done** to display the standard print window. Click **OK** after selecting the appropriate label printer.

10. After you have reviewed and accepted the printed labels, click the right double arrows under **Listed Procedures** until each procedure has reached the status **FINISH** (or the last processing status defined for each procedure). These cases are now complete for procedures and will no longer be included when filtering the **Case List** to *Needs Procedures*. The flag super-subscript will no longer appear for these Cases.

Reprinting Procedure Slide Labels

Procedure Labels may be reprinted at any time. Follow the instructions for Printing Procedure Slide Labels.

Previewing & Printing Profile Labels

Previewing Profile Cassette Labels

1. Filter the **Case List** to *Needs Procedures*.
2. Press **CTRL+A** to select all Cases.
3. Click **Procedures**.
4. The **Procedure List Window** (Figure 1) opens.
5. Using the **Procedure List Window Drop-Down Filter Fields,** filter the list box so that only the information desired is displayed.
6. Highlight all of the rows displayed in the list box by hitting **CTRL+A**.
7. To **Preview** Profile Cassette Labels, select the **Preview Labels for Selected Blocks** menu item from the **Labels Menu.**

Printing Profile Cassette Labels

1. Filter the **Case List** to *Needs Procedures*.
2. Press **CTRL+A** to select all Cases.
3. Click **Procedures**.
4. The **Procedure List Window** (Figure 1) opens.
5. Using the **Procedure List Window Drop-Down Filter Fields,** filter the list box so that only the information desired is displayed.
6. Highlight all of the rows displayed in the list box by hitting **CTRL+A**.
7. To **Print** Profile Cassette Labels, select the **Print Labels for Selected Blocks** menu item from the **Labels Menu.**
8. If there is more than one Profile Cassette Label Format defined in the Formatter, a drop-down menu of profile label formats is displayed. Click on the desired format and click **Done.**
9. The Label Start Prompt is displayed. Enter the row and column where the first label should print on the stock or enter a starting label number. Click **Done** to display the standard print window. Click **OK** after selecting the appropriate label printer.

Reprinting Profile Labels

Profile Cassette Labels may be reprinted at any time. Follow the instructions for Printing Profile Cassette Labels.

Printing Labels via Instrument Interface

Rather than printing paper labels to networked label printers, WindoPath can also print both Procedure Slide Labels and Profile/Cassette Block Labels to printers via Instrument Interface. (Ex: Glass Slide Etchers, Cassette Etchers, etc.) To do this, you will need a direct instrument interface from WindoPath to the instrument printer.

Printing to a Slide Labeler via Instrument Interface

1. Filter the **Case List** to *Needs Procedures*.

2. Press **CTRL+A** to select all Cases.

3. Click **Procedures**.

4. The **Procedure List Window** (Figure 1) opens.

5. Using the **Procedure List Window Drop-Down Filter Fields,** filter the list box so that only the information desired is displayed.

6. Highlight all of the rows displayed in the list box by hitting **CTRL+A**.

7. To **Print** Procedure Labels, select the **Sent to Stainer (Interface)** menu item from the **Procedures Menu** or select the **Print Slide Label (Interface)** menu item from the **Labels Menu.** *Note: Your Interface Programmer will determine and let you know which of the two menu items mentioned above should be selected.*

8. The print job will be sent across the interface to the Slide Labeler for printing.

9. After you have reviewed and accepted the printed labels, click the right double arrows under **Listed Procedures** until each procedure has reached the status **FINISH** (or the last processing status defined for each procedure). These cases are now complete for procedures and will no longer be included when filtering the **Case List** to *Needs Procedures*. The flag super-subscript will no longer appear for these Cases.

Printing to a Cassette Labeler via Instrument Interface

1. Filter the **Case List** to *Needs Procedures*.

2. Press **CTRL+A** to select all Cases.

3. Click **Procedures**.

4. The **Procedure List Window** (Figure 1) opens.

5. Using the **Procedure List Window Drop-Down Filter Fields,** filter the list box so that only the information desired is displayed.

6. Highlight all of the rows displayed in the list box by hitting **CTRL+A**.

7. To **Print** Profile Cassette Labels, select the **Print Cassette (Interface)** menu item from the **Profiles Menu.**

8. The print job will be sent across the interface to the Cassette Labeler for printing.

QC Labels

Select *Print/Generate QC Labels* from the **Procedures Window** – *Labels Menu* or type **CTRL+SHIFT+Q** to open the **QC Label Window** (Figure 3).
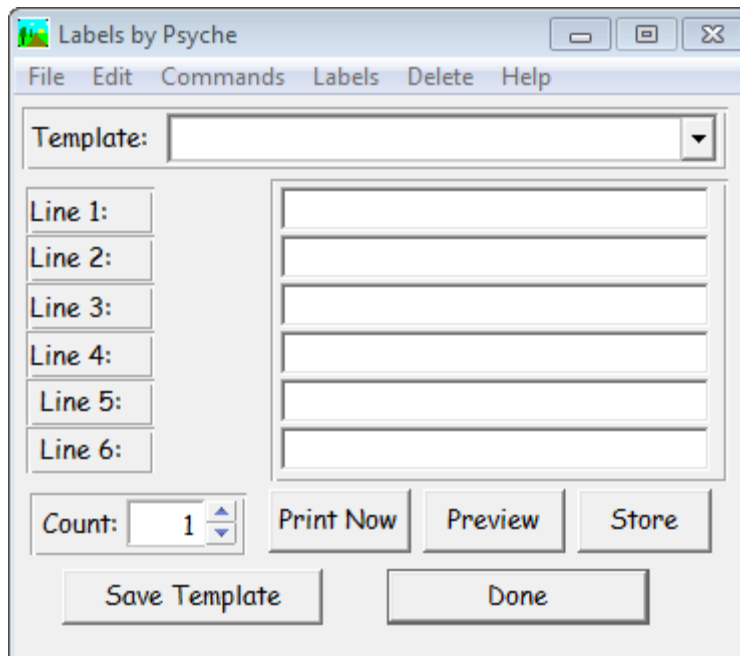
Figure 3 – **QC Label Window**

The **QC Label Window** allows you to print customized labels as needed, using up to six lines of User-defined text. You can also save the templates you create to be used at a later time.

You can type free text on each of the six lines. You can also automatically insert such items as the technologist's initials and current date and time by selecting items from the *Labels Menu*.

QC Label Window Fields

- *Template* – this drop-down menu allows you to select previously stored templates. If creating a new template, enter a name for the template in this field. The six lines of information currently displayed are stored as the template.

- *Line 1 through Line 6* – free text entries can be made in these lines. The maximum length of each line is determined by the number of characters that will fit the defined Label Width using the specified Label Font. You can also select options from the *Labels Menu* to specify information for label printing.

- *Count* – type free text or use the **arrow buttons** to enter the number of labels you wish to print.

QC Label Window Action Buttons

- **Print Now** – prints the specified number of labels using the currently displayed template.

- **Preview** – opens the Print Preview Window, displaying a preview of labels for the selected procedures.

- **Store** – stores the count number and the template information for the next time you print labels. When printing procedure labels, **WindoPath** checks to see if QC labels have been specified. If QC labels have been stored for later printing, you are prompted to print the QC labels along with the requested procedure labels.

- **Save Template** – saves the currently displayed template with the name displayed in the **Template field**. If the field is empty, you are prompted for the name of a template.

- **Done** – closes the **QC Label Window**.

QC Label Window Menus

Labels Menu

- *Clear Window* – **CTRL+W** – clears all lines in the **QC Label Window**.

- *Insert Tech Initials* – **CTRL+I** – inserts the current User's initials in the line where the cursor is positioned.

- *Insert Count* – **CTRL+C** – inserts the label count displayed in the Count: field in the line where the cursor is positioned.

- *Insert Date* – **CTRL+D** – inserts the current date in the line where the cursor is positioned.

- *Insert Time* – **CTRL+T** – inserts the current time in the line where the cursor is positioned.

- *Insert Date and Time* – **CTRL+A** – inserts the current date and time in the line where the cursor is positioned.

- *Insert Note Fields* – **CTRL+N** – inserts both notes defined in the **QC Label Format Window** in the line where the cursor is positioned.

- *Insert Note 1 Field* – **CTRL+X** – inserts Note 1 defined in the **QC Label Format Window** in the line where the cursor is positioned.

- *Insert Note 2 Field* – **CTRL+Y** – inserts Note 2 defined in the **QC Label Format Window** in the line where the cursor is positioned.

Delete Menu

- *Delete Template* – deletes the template currently displayed in the **Template field**.

Printing QC Labels

1. Fill in all desired fields on the **QC Label Window**.
2. Click **Print Now**.

3. If there is more than one QC Label Report defined in the Formatter, a drop-down menu of label report formats is displayed. Click on the desired format and click **Done**.

4. The **Label Start** prompt opens. Enter the row and column where the first label should print or enter the starting label number. Click **Done** to display the standard print window. Click **OK** after selecting the appropriate labels printer.

Storing QC Labels

1. Fill in all desired fields on the **QC Label Window.**

2. Click **Store**.

3. The next time procedure labels are printed, the message **Include QC Labels** will be displayed. Respond **Yes** to print the stored QC labels.

4. A drop-down menu of Procedure Label Report formats is displayed. Click on the desired format and click **Done**.

5. A drop-down menu of QC Label Report formats is displayed. Click on the desired format and click **Done**.

6. The **Label Start** prompt opens. Enter the row and column where the first label should print or enter the starting label number. Click **Done** to display the standard print window. Click **OK** after selecting the appropriate labels printer.

Specimen and Procedure Tracking

WindoPath v8 offers an integrated process and complete chain of custody wherein Users may track specimens and procedures at any time, providing increased employee productivity, increased quality and increased patient safety gains.

Specimen and Procedure Tracking is designed to allow specimens to be followed through the entire histology process, workstation to workstation, documenting each step.

WindoPath has the ability to generate and read barcodes, so users are able to scan a bar-coded label on a requisition or slide to automatically accession the case or to automatically locate the case in the CLW.

All tracking functionality is directly accessed by the User from the **Tracking Menu** from the **Dispatcher Window** (Figure 4).
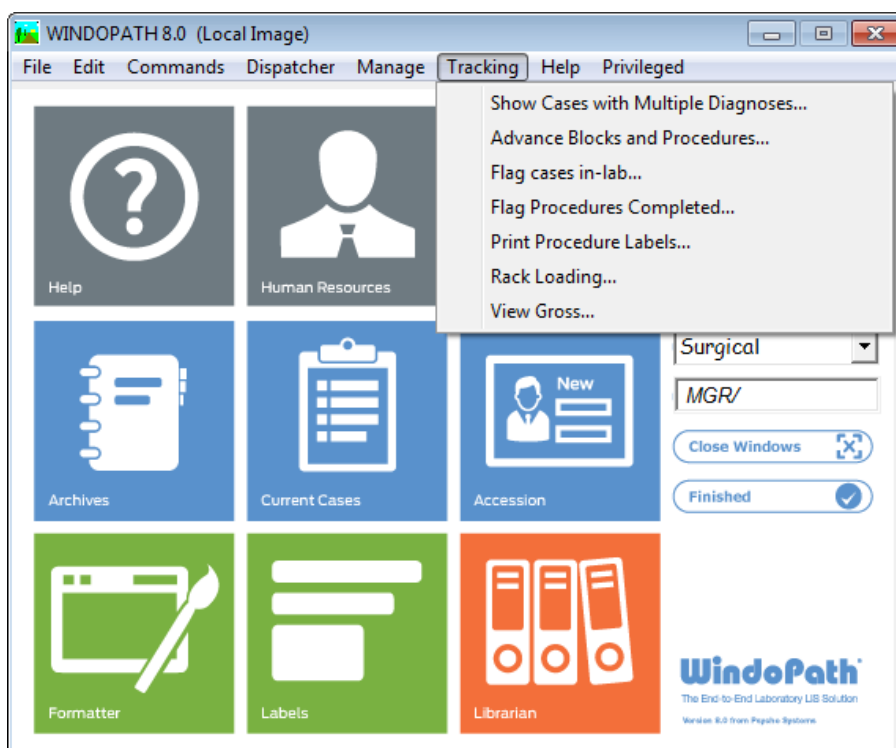
Figure 4 – **Dispatcher Window – Tracking Menu**

Tracking Menu

- *Show Cases with Multiple Diagnosis* – opens a scrolling window listing the case numbers of all of the current cases which have *Multiple Diagnosis'* on them.

- *Advance Blocks and Procedures* – opens the **Advance Procedures** Tracking Window (Figure 5).

- *Flag Cases In-Lab* – not used.

- *Flag Procedures Completed* – opens the **Verify Procedures** Tracking Window (Figure 7).

- *Print Procedure Labels* – opens the **Print Labels for Procedures** Tracking Window (Figure 8).

- *Rack Loading* – opens the **Rack Loading** Tracking Window (Figure 9).

- *View Gross* – opens the **View Gross** Tracking Window (Figure 10).

Advance Procedures Window

Select *Advance Blocks and Procedures* from the **Dispatcher Window** – *Tracking Menu* to open the **Advance Procedures Window** (Figure 5).

The **Advance Procedures Window** allows you to efficiently advance each cassette's block status. Basic set up requires you to define each Histology Workstation in the Workstation Library. Ex: **Embed**, **Cut** and **Gross**. After the case is accessioned and the Profiles are ordered, a 2D barcode is generated for each cassette block.

Depending on which Workstation the User is currently using, the User must first select the appropriate Block Status in the **Step to Set To** drop-down menu. Next, in the **Enter ID** field, the User scans the unique barcode on the current cassette. In this one action, WindoPath will:

- Advance the Block Status to the selected status in the drop-down menu.

- In the **Advance Procedures List Box**, WindoPath will display every Procedure ordered on the given block, the Procedure Status of every Procedure and the current Block Status.

Please contact your Application Specialist or WindoPath Support for set-up assistance when implementing this functionality.
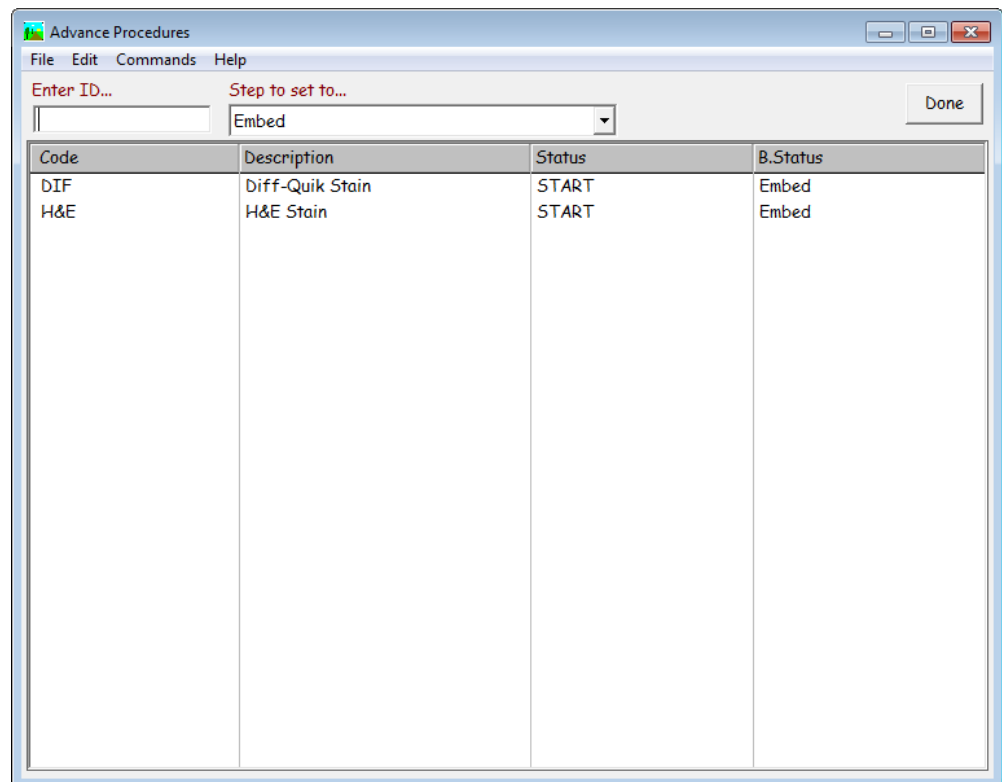
Figure 5 – **Advance Procedures Tracking Window**

Verify Procedures Window

Select *Flag Procedures Completed* from the **Dispatcher Window** – *Tracking Menu* to open the **Verify Procedures Window** (Figure 6).

The **Verify Procedures Window** allows you to verify that each procedure belongs to the scanned case. It also allows you to advance each procedure's status to its final step.

The basic set up requires you to: set up and print a requisition label containing a bar code with either the case number or the case Object ID; set up and print procedure labels containing a bar code with the procedure Object ID (Tag.specimenBlockProcedure).

Scan the case number or Object ID in the first field of the **Verify Procedures Window**. All of the procedures for this case will display in the column area of the

window. Scan each procedure label into the second field. If the procedure belongs to this case, the Verified column will change to **True**, the B. Status column will change to Complete and the Status column will change to the last step for this procedure.

Figure 6 – **Verify Procedures Tracking Window**

Print Labels for Procedures Window

Select *Print Procedure Labels* from the **Dispatcher Window** – *Tracking Menu* to open the **Print Labels for Procedures Window** (Figure 7).

The **Print Labels for Procedures Window** allows you to efficiently print Procedure slide labels for each cassette block. After the case is accessioned and the Profiles are ordered, a 2D barcode is generated for each cassette block.

In the **Scan Cassette Label** field, the User scans the unique barcode on the current cassette. In this one action, WindoPath will:

- In the **Print Labels for Procedures List Box**, WindoPath will display every Procedure ordered on the given block, a **True**/**False** value for **Printed**, the Procedure Status of every Procedure, the current Block Status of the Profile and the slide count. In the additional fields below the List Box, WindoPath with display other case/Profile specific information whenever applicable including the specimen's Gross Description, the assigned case Submitter, Special Flags and Special Instructions.

- WindoPath will automatically open a series of **Print Dialogue Windows** so that the User may select the appropriate printer to print slide labels to.

Please contact your Application Specialist or WindoPath Support for set-up assistance when implementing this functionality.

*Figure 7 –* **Print Labels for Procedures Tracking Window**

Rack Loading Window

Select *Rack Loading* from the **Dispatcher Window** – *Tracking Menu* to open the **Rack Loading Window** (Figure 8).

The **Rack Loading Window** allows you to keep track of your specimens, profiles and procedures. Prior to using this feature, you will need to define your racks in the Librarian, *Library menu*, Rack Definitions. These are meant to correspond to the physical racks you are using to store your specimens, profiles and procedures.

Additional set will include:

- If you are going to use rack loading to store your specimens, you will need a bar coded specimen Object ID on your specimen labels.

- If you are going to use rack loading to store your profiles, you will need a bar coded specimen block Object ID on your block (profile) labels.

- If you are going to use rack loading to store your procedures, you will need a bar coded specimen block procedure Object ID on your procedure labels.

Select the rack type from the drop-down in the upper, left corner of the window. Select the specific rack you are going to load. All items currently in this rack will display on the right side of the window. To load a specimen into a rack, scan the bar code on the specimen label into the field which states, **Scan label here to add to rack…** The field to the right of that shows the next available slot. Hit the enter key and the specimen will be loaded into the next available slot.

If you want to locate a particular specimen, scan the bar code into the field to the far right labeled **Scan label here to look up…**

Follow the same method for loading and locating procedures and profiles as stated above for specimens.

Figure 8 – **Rack Loading Tracking Window**

View Gross Window

Select *View Gross* from the **Dispatcher Window** – *Tracking Menu* to open the **View Gross Window** (Figure 9).

The **View Gross Window** allows you to scan a bar-coded cassette label into a field to view the Gross Description for the specimen in the text box below. Click the **Case button** to open the **Quick Case Window** with the Gross Tab brought forward. Click **Done** to close the window.
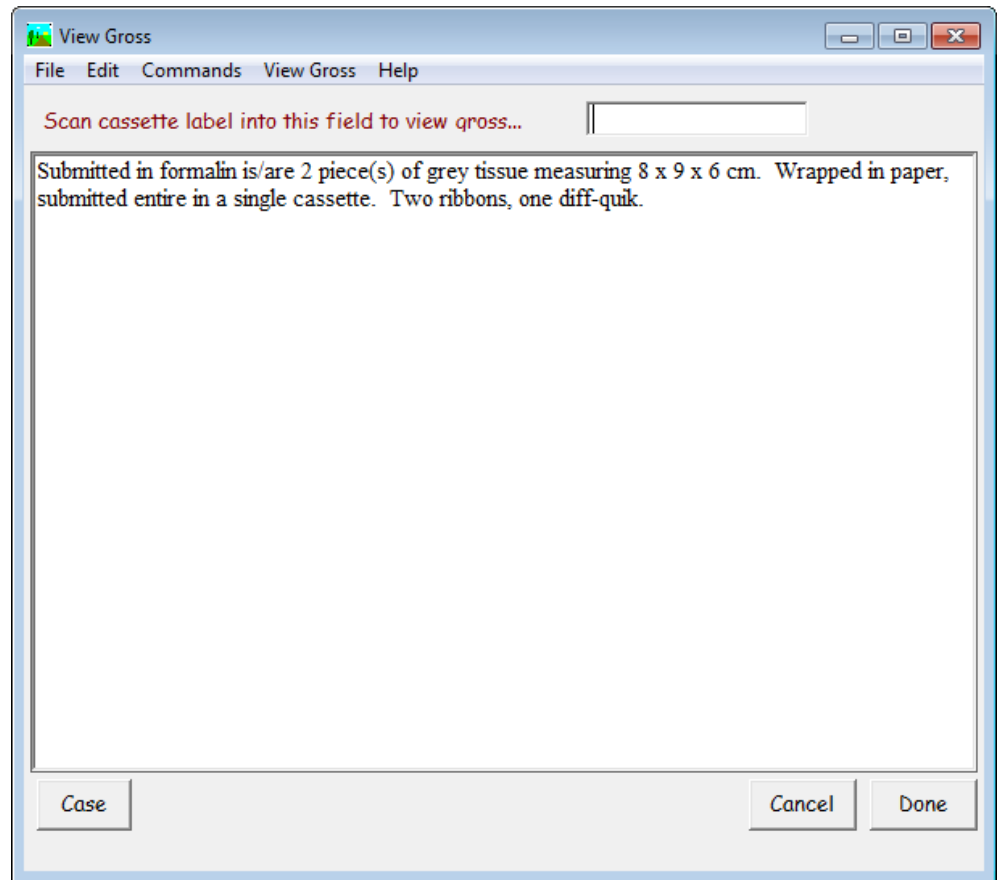
Figure 9 – **View Gross Tracking Window**

Chapter 6 – Diagnostic Result Entry & Sign Out

Once cases have had gross descriptions entered, they advance to the status of *Needs Microscopic*. Once cases have had microscopic descriptions entered, they advance to the status of *Needs Diagnosis*. Once cases have had diagnosis results entered, they advance to the status of *Needs Signature*.

This chapter describes the steps involved in diagnostic result entry and signing out cases. Since charges are usually adjusted when Cases are signed out, adding, deleting and modifying charges is also described in this chapter.

Microscopic Description

Depending on the lab's workflow, there are a few different methods to enter a microscopic description on a case specimen; Free Text Microscopic Entry from Dictation, Microscopic Entry Using Canned Paragraphs and Default Microscopic Entry by Source.

Free Text Microscopic Entry from Dictation

The dictation functionality requires a microphone or other sound input device in order to create sound files. Within the Directory Specification Window (from Preference List Window's Site Wide Menu, 'Directories' menu item), there is a directory called **Dictation Directory.** This directory contains any created dictation files. When the dictation directory is specified, a dialog will appear advising the user that a default sound file, 'sound.wav', must be created in this directory. A file navigation dialog will appear asking the user to indicate the default sound recording application. This is the application that is set to open when a .wav file is opened. After the user has specified the recording application, another dialog appears telling the user to save an empty sound file called 'sound.wav' to the dictation directory. The sound recording application is then invoked. It is the user's responsibility to create 'sound.wav'. If 'sound.wav' does not exist, the user will receive an error message advising the user to create 'sound.wav'.

The Pathologist reviews the case in WindoPath while dictating the microscopic description into dictation software or recording device. The dictated microscopic is then accessed by a Transcriptionist who actually performs the entry of the microscopic description into the **Micro** tab in the **Quick Case Window.**

Bolding and italics can be turned on or off by highlighting the desired text and using the following commands:

- **ALT+B** – defines bold text.
- **ALT+I** – defines italic text.
- **ALT+CTRL+B** – defines bold italic text
- **ALT+U** – defines underlined text.
- **ALT+N** – defines normal text.

Microscopic Entry Using Canned Paragraphs

Free text can be entered as the microscopic description or press **CTRL+L** to display entries from the **Paragraphs Library**.

1. The User may locate the desired case in the **Case List Window** using one of the following methods:

   - Scan a case-specific bar code (either from a slide or requisition label) using **Load Case** (**CTRL+K**) from CLW.

   - Filter the **Case List Window** accordingly.

2. Once the appropriate Case or Cases are selected and listed in the **Case List**, highlight the bottom (or first) Case in the list. Double click the Case or click **Open** to open the **Quick Case Window**, shown in Figure 1.

3. To pull a canned microscopic paragraph from the **Paragraphs Library**, hit **CTRL+L** to display entries from the **Paragraphs Library**. Multiple paragraphs can be selected at one time by clicking on each selection in the order that you want them. The entire interpretation is built in the bottom of the window.

4. A specific paragraph can be entered automatically by typing the code for the paragraph and pressing **CTRL+L**.

5. If the selected microscopic paragraph does contain any underscores for variable information entry, the microscopic description for the specimen is considered to be **incomplete.** Hit **CTRL+I** to move the cursor to the next blank space or underscore. Continue to hit **CTRL+I** to fill in the blanks until there are no remaining blank underscores.

6. Once the text becomes lengthy enough, scroll bars appear on the right so that the complete description can be viewed.

7. If a Case has more than one Specimen, highlight the next Specimen in the **Specimen List Box** to open the **Micro tab** for the next Specimen on the Case.

8. Once the microscopic description has been entered for **each** Specimen on a Case, the Case *Needs* advance to *Needs Diagnosis.*

9. Click **Next** in the **Quick Case Window** to open the next Case for microscopic description entry.

Default Microscopic Entry by Source

If you want a specific canned microscopic description to be entered on every specimen with a specific source built in the Sources Library, you can link the canned microscopic paragraph to that specific source. When a specimen with this source is saved in the

Accession Window, the default microscopic description is automatically entered on the specimen in the **Quick Case Window, Micro tab**.

Once a completed microscopic description has been entered for **each** Specimen on a Case, the Case will advance from *Needs Microscopic* to *Needs Diagnosis.*

If all of the case's specimens have a defaulted microscopic paragraph which does not contain any underscores for variable information entry, the microscopic description for the specimen is considered to be **complete** and the case status will have already been automatically advanced to *Needs Diagnosis.*

On the contrary, if any of the defaulted microscopic paragraphs do contain any underscores for variable information entry, the microscopic description for the specimen is considered to be **incomplete** and the case status will not advance to *Needs Diagnosis* until there are no remaining blank underscores.

CTRL+I is used to move the cursor to fill in the blanks that can be stored in the canned paragraphs.

Figure 1 - **Quick Case Window with microscopic description entered**

Adding a Diagnosis

Depending on the lab's workflow, there are a few different methods to enter a diagnosis on a case specimen; Free Text Diagnosis from Dictation, Diagnosis Entry Using Canned Paragraphs and Default Diagnosis Entry by Source. If the Diagnosis for a Specimen is available at the time the microscopic is entered, it is usually entered then, but it can be entered at any time.

You can type free text in the **Diagnosis tab** or press **CTRL+L** to display the **Diagnosis Selection Window**. This window lists all Diagnoses associated with the Specimen source in the **Source Library**. This window also lists all Diagnoses that have been defined in the **Diagnosis Library** as **Applies to All Sources**. This allows you to create

a single non-site specific Diagnosis, such as *carcinoma*, yet have it listed for all Specimen types.

Figure 2 shows the **Quick Case Window** with the **Diagnosis tab** selected.

Partial searches on the Diagnosis code can be performed by typing the pound sign (#) followed by the full or partial Diagnosis code, then pressing **CTRL+L**. (Alternately, you can enter the partial code, then press **SHIFT+CTRL+L**.) The **Diagnosis List Window** then displays only the Diagnoses matching the specified criteria.

The **Diagnosis Selection Window** lists Diagnoses in the format *CODE: Diagnosis text* in the top half of the window. The bottom half of the window displays the complete text of all the Diagnoses you have selected from the list. Select a Diagnosis by clicking on it in the list and clicking **Select**. Multiple Diagnoses can be strung together by double clicking each Diagnosis in the list in the order in which you want them to appear. To enter the selected Diagnoses in the **Diagnosis tab**, click **Done**.

The Diagnosis will now appear in the **Diagnosis List Box**.

Figure 2 - **Quick Case Window with Diagnosis tab selected**

Free Text Diagnosis from Dictation

The Pathologist reviews the case in WindoPath while dictating the diagnosis into dictation software or recording device. The dictated diagnosis is then accessed by a Transcriptionist who actually performs the entry of the diagnosis into the **Diag** tab in the **Quick Case Window.**

Bolding and italics can be turned on or off by highlighting the desired text and using the following commands:

- **ALT+B** – defines bold text.

- **ALT+I** – defines italic text.

- **ALT+CTRL+B** – defines bold italic text

- **ALT+U** – defines underlined text.
- **ALT+N** – defines normal text.

Diagnosis Entry Using Canned Paragraphs

Free text can be entered as the diagnosis or press **CTRL+L** to display entries from the **Diagnosis Library**.

1. The Pathologist may locate the desired case in the **Case List Window** using one of the following methods:

   - Scan a case-specific bar code (either from a slide or requisition label) using **Load Case** (**CTRL+K**) from CLW.

   - Filter the **Case List Window** accordingly.

2. Once the appropriate Case or Cases are selected and listed in the **Case List**, highlight the bottom (or first) Case in the list. Double click the Case or click **Open** to open the **Quick Case Window**, shown in Figure 1.

3. To pull a canned diagnosis entry from the **Diagnosis Library**, hit **CTRL+L** to display entries from the **Diagnosis Library**. Multiple paragraphs can be selected at one time by clicking on each selection in the order that you want them. The entire interpretation is built in the bottom of the window.

4. A specific diagnosis entry can be entered automatically by typing the code for the paragraph and pressing **CTRL+L**.

5. If the selected diagnosis does contain any underscores for variable information entry, the diagnosis for the specimen is considered to be **incomplete.** Hit **CTRL+I** to move the cursor to the next blank space or underscore. Continue to hit **CTRL+I** to fill in the blanks until there are no remaining blank underscores.

6. Once the text becomes lengthy enough, scroll bars appear on the right so that the complete description can be viewed.

7. If a Case has more than one Specimen, highlight the next Specimen in the **Specimen List Box** to open the **Diag tab** for the next Specimen on the Case.

8. Once a diagnosis has been entered for **each** Specimen on a Case, the Case *Needs* advance to *Needs Signature.*

10. Click **Next** in the **Quick Case Window** to open the next Case for diagnosis entry.

Default Diagnosis Entry by Source

If you want a specific canned diagnosis paragraph to be entered on every specimen with a specific source built in the Sources Library, you can link the canned diagnosis paragraph to that specific source. When a specimen with this source is saved in the **Accession Window**, the default diagnosis is automatically entered on the specimen in the **Quick Case Window, Diag tab**.

Once a completed diagnosis entry has been entered for **each** Specimen on a Case, the Case will advance from *Needs Diagnosis* to *Needs Signature.*

Assuming the defaulted diagnosis paragraphs contain any underscores for variable information entry, the diagnosis entry for the specimen is considered to be **incomplete**

and the case status will not advance to *Needs Signature* until there are no remaining blank underscores.

CTRL+I is used to move the cursor to fill in the blanks that can be stored in the canned paragraphs.

Entering Multiple Diagnoses

To add a second (or third, etc.) Diagnosis to the highlighted Specimen in the **Specimen List Box**, select *Add Diagnosis* from the *Add/Delete Menu* and follow the instructions in the section entitled **Adding Diagnoses**.

Assign Diagnosis to All Specimens

Selecting this menu item from the *Add/Delete Menu* or pressing **CTRL+ALT+A** copies the text of the Diagnosis selected in the **Diagnosis List Box** to each of the Specimens on the Case.

Deleting a Diagnosis

To delete a Diagnosis, highlight the appropriate Diagnosis in the **Diagnosis List Box** and select *Delete Diagnosis* from the *Add/Delete Menu*. At the prompt, **Really delete diagnosis**, click **Yes**. Click **No** to cancel the operation.

If the Case has been signed out and the current User is *not* the Case signer, the *Delete Diagnosis* menu item is not available for selection. If the Case is at the stage *Complete*, no User can delete the Diagnosis.

SNOMED

The **SNOMED tab** lists the SNOMED codes that are associated with the current Diagnosis.

SNOMED codes are usually associated automatically through those Diagnoses defined in the **Diagnosis Library** or in the **Phrases Library.**

SNOMED codes can also be added manually by selecting **Add SNOMED Code** from the Add/Delete Menu.

ICD Code

The **ICD tab** lists the ICD codes that are associated with the current Diagnosis.

ICD codes are usually associated automatically through those Diagnoses defined in the **Diagnosis Library** or in the **Phrases Library.**

ICD codes can also be added manually by selecting **Add ICD Code** from the Add/Delete Menu or by hitting **CTRL+SHIFT+I** in the **ICD tab**.

Diagnosis Code

To modify a Diagnosis Code, highlight the Diagnosis in the **Diagnosis List Box** and select *Diagnosis Code* from the *Modify Menu*. The Diagnosis Code box is displayed. Edit the Diagnosis Code and click **OK** to save your changes.

If a Diagnosis Code has been entered on a Diagnosis Entry in the Diagnosis Library, the code will be automatically linked to the specimen diagnosis and displayed in the **Diagnosis List Box** on the **Quick Case Window**.

Diagnosis Note

Click the **D Note tab** to bring it forward. You can type free text in this tab or press **CTRL+L** to display entries from the **Paragraphs Library**.

If a Diagnosis Note has been entered on a Diagnosis, the note will be displayed in the **Diagnosis List Box** on the **Quick Case Window**.

All data entered on the D Note tab will display on the report in the **D Note** section.

Synoptic Reporting

You can add a Synoptic Report to a diagnosis either 1) electronically using CAP's eCC Electronic Cancer Checklists or 2) manually using templates that you created or downloaded from the CAP website.

The **Syn tab** in the **Quick Case Window** is a place for the specimen's synoptic report to be displayed and stored. Any data entered on this tab will display in the **Synoptic Report** section in the Formatter.

You can also print the synoptic report BELOW the specimen diagnosis in the **Diagnosis Section** of the report by setting preference O694, **Print Synoptic in diagnosis section of report**, set to **True**.

Electronic Synoptic Reporting – CAP eCC Electronic Cancer Checklists

In order to perform electronic synoptic reporting in WindoPath you must contact CAP to purchase an annual license for your lab to use CAP's eCC Electronic Cancer Checklists. CAP will then provide your lab with the eCC templates **in XML format** (not PDF or Word formats).

Contact WindoPath Support for set up and installation assistance to utilize electronic synoptic reporting.

1. Select the appropriate case in the Case List Window. Click the **Open button** on the bottom, left corner of the window.
2. After the Quick Case Window opens for the selected case, go to the Reporting Menu and select Synoptic Report or use the keyboard shortcut **CTRL+Y**.
3. The Synoptic Reporting window will open. The patient name, case number and specimen site will be displayed in the top right corner of the window.
4. In the bottom left corner, click the **New Template button** to search for the appropriate synoptic template. The **Select Template** window will appear and will display all of the templates available. Double click the appropriate template in the pick list and you will be brought back to the main Synoptic Window.
5. Fill out the electronic synoptic report template. For more information, please reference the published document **How to Create a Synoptic Report** or contact WindoPath Support for more information.
6. After you are finished filling out the synoptic report and saving it, the Synoptic Reporting Window will close and you are brought back to the **Syn**

tab in the **Quick Case Window**. The saved synoptic report will display in the **Syn tab.**

To Load a New Template

You may replace a current template with a new one by pressing the **Load Template button** located at the bottom of the **Synoptic Report Window**. A file navigation dialog will appear allowing you to open the desired template.

Once a template has been loaded, you may use various keyboard strokes to fill in the checklist.

Synoptic Report Window Action Buttons

- **Last Blank** – moves the cursor to the last blank on the checklist.

- **Next Blank** – moves the cursor to the next blank on the checklist.

- **Last Section** – moves the cursor to the first checklist item of the last section.

- **Next Section** – moves the cursor to the first checklist item of the next section.

- **Check** – inserts an 'x' besides a checklist item. To remove the 'x' double-click the check box.

- **Load Button** – opens the Synoptic Reports Directory.

- **Done** – saves the Synoptic Report.

Case Report Window

If you prefer editing text in a word processor, select *Word Process* from the **Quick Case Window** - *Reporting Menu* or press **CTRL+W**. The full report will be displayed in the **Case Report Window** (Figure 3).
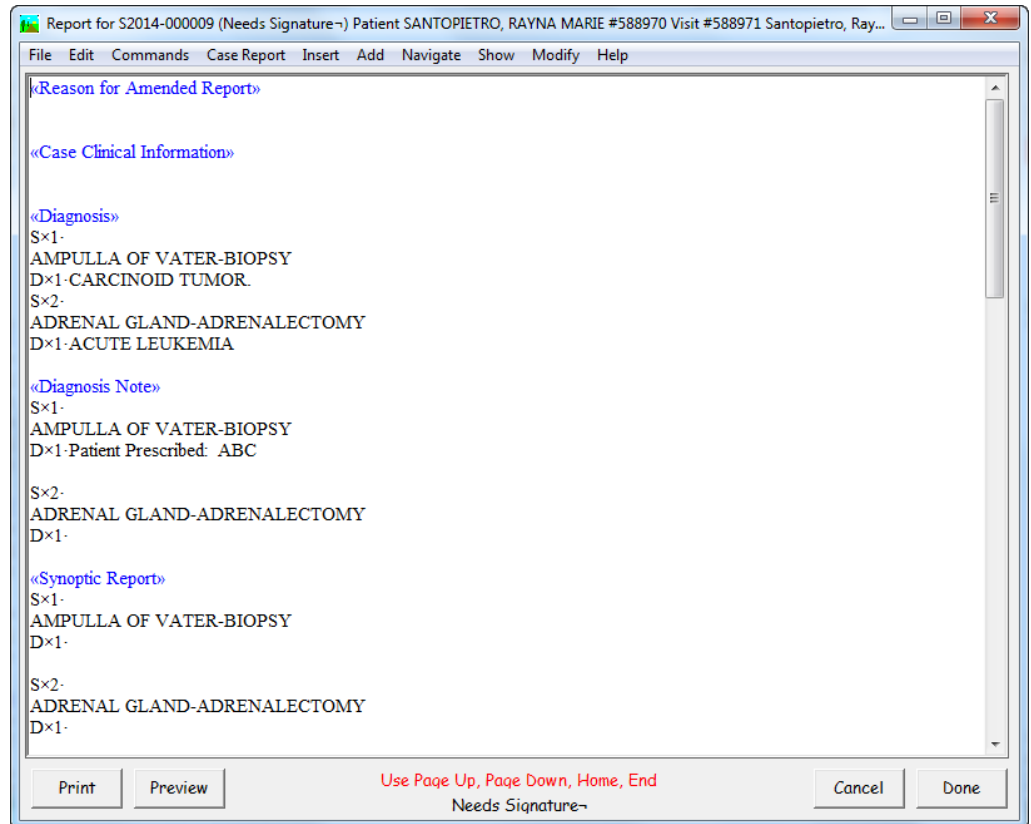
Figure 3 – **Case Report Window**

The sections of the report are listed in alphabetical order. Section headings are displayed in blue and are enclosed in brackets. The text for each section is under each section heading. The text of the report is displayed in normal text font.

If the section is a Case level section, it will not be labeled. If the section is a Specimen level section, it will be labeled with the letters Sx and the Specimen number/letter. *Example*: SxA. If the section is a Diagnosis level section, each Diagnosis will be labeled with the Specimen number/letter and Diagnosis number. *Example*: SxA Dx1.

NOTE: DO NOT delete the Specimen and Diagnosis section labels.

Case Report Window Action Buttons

- **Print** – **CTRL+SHIFT+P** – opens the standard print window to print a report for the current Case.

- **Preview** – opens the **Print Preview Window** displaying the report for the current Case on the screen.

- **Cancel** – closes the **Case Report Window** without saving any changes.

- **Done** – closes the **Case Report Window** saving any changes.

Case Report Window Menus

Case Report Menu

- *Print* – **CTRL+SHIFT+P** – opens the standard print window to print a report for the current Case.

- *Print Preview* – **CTRL+0**– opens the **Print Preview Window** displaying the report for the current Case on the screen.

Insert Menu

- *Insert Coded Phrase* – if the cursor is placed in a report section that corresponds to the **Phrases Library** (ex. Case Clinical Information), typing a code or partial code and selecting this menu item opens the appropriate Phrases Library Box, where one or more phrases can be selected.

- *Insert Paragraph* – if the cursor is placed in a report section that corresponds to the **Paragraphs Library** (ex. Gross Description), typing a code or partial code and selecting this menu item opens the **Paragraphs Library**, where one or more paragraphs can be selected.

- *Insert Diagnosis* – if the cursor is placed in the Diagnosis Section, typing a code or partial code and selecting this menu item opens the **Diagnosis Library**, where one or more Diagnosis definitions can be selected.

Add Menu

- *Add Specimen* – opens the **Accession Window** with the **Specimen tab** selected. Press **CTRL+N** to create a new Specimen.

- *Add Diagnosis* – **CTRL+SHIFT+D** – creates a new Diagnosis record labeled with the appropriate number (ex. Dx2).

Navigate Menu

- *Go to Top* – **CTRL+ALT+T** – moves the cursor to the top of the **Case Report Window**.

- *Go to Gross* – **CTRL+ALT+G** – moves the cursor to the beginning of the first gross description.

- *Go to Microscopic* – **CTRL+ALT+M** – moves the cursor to the beginning of the first microscopic description.

- *Go to Diagnosis* – **CTRL+ALT+D** – moves the cursor to the beginning of the first Diagnosis.

- *Go to Bottom* – **CTRL+ALT+B** – moves the cursor to the bottom of the **Case Report Window**.

- *Switch to Quick View* – **CTRL+Q** – opens the **Quick Case Window** for the current Case.

- *Next Section* – **ALT+T** – moves the cursor to the next modifiable section.

- *Previous Section* – **CTRL+ALT+SHIFT+S** – moves the cursor to the previous modifiable section.

- *Next Entry* – **CTRL+ALT+E** – moves the cursor to the next Specimen or Diagnosis label.

- *Previous Entry* – **CTRL+ALT+SHIFT+E** – moves the cursor to the previous Specimen or Diagnosis label.

Show Menu

- *Procedures* – opens the **Procedures Window**, displaying all procedures for the current Case.

- *History* – opens the **History Window**, displaying all past Diagnoses for the current Patient.

Modify Menu

Refer to the section entitled **Modify Menu** in *Chapter 4 – Current Cases, Grossing and Result Entry* for a description of this menu.

Text Editing in an External Word Processor

To edit text in an external word processor, the reserved preference **Word Processing Mode** must be set to **False**. Selecting *Word Process* from the **Quick Case Window – *Reporting Menu*** opens the Case report in Microsoft Word or the word processing program set as the default on the PC.

Keywords

The Keywords function aids in text editing by allowing specification of terms that are prone to error.

When a Case is at *Needs Signature* and at least one keyword has been defined in the **Phrases Library – Keywords Box**, all keywords will be highlighted in the current tab of the **Quick Case Window**.

If the Case is not at *Needs Signature*, keywords can be highlighted by selecting *Highlight Keywords* from the *Reporting Menu*.

Signing Out a Case

Once Cases have had microscopic descriptions and Diagnoses entered, they have the status of *Needs Signature*. This chapter describes the steps involved in signing out Cases and printing final reports. Since charges are usually adjusted when Cases are signed out, modifying charges is also described in the section below.

WindoPath was designed for the Pathologist to perform the final review of each Case on line and sign out each Case while reviewing and/or modifying charges.

To sign out Cases, you must first create a **Case List** containing Cases that need to be signed out. Click **Current Cases** on the **Dispatcher Window** or the desk file drawer if you are using the **Office Dispatcher**, to open the **Case List Window**. The **Case List Window** is described in *Chapter 4 – Current Cases, Grossing & Result Entry.*

Click on the drop-down menu of Case *Needs*. Click on *Signature* to select it. Once *Needs Signature* is selected, the **Case List** displays only Cases that need signatures. The Case List can also be limited by Case type and/or Pathologist.

Sign Out from the Quick Case Window

1. Once the appropriate Cases are selected and listed in the **Case List**, highlight the bottom (or first) Case in the list. Double click the Case or click **Open** to open the **Quick Case Window**. The **Quick Case Window** is described in *Chapter 4 – Current Cases, Grossing & Result Entry.*

2. After the Pathologist completely reviews the Case in the **Quick Case Window**, the Case is signed out by clicking **Sign** or pressing **ALT+X**. The **Pathologist Signature Window** opens. The Pathologist assigned to the User account is highlighted in the list box. If this is not the Pathologist signing the Case, double click the correct Pathologist in the list. The Type column indicates whether each Pathologist is a Signer or Cyto Signer. Only Signers may sign out Cases from the **Quick Case Window**.

3. Enter the electronic signature password of the Pathologist signing out the Case. This is the Pathologist whose signature appears on the report along with the facsimile signature, if one is stored for the Pathologist. Click **Done**.

4. The **Really sign out** prompt is displayed. Click **Yes** to sign out the Case. Click **No** to cancel the operation. After sign out, the Case is now at the status *Needs Final Report*.

Sign Out from the Preview Window

1. Once the appropriate Cases are selected and listed in the **Case List**, highlight the bottom (or first) Case in the list. Double click the Case or click **Open** to open the **Quick Case Window**.

2. With Preference O387, **Allow Sign out from preview window**, set to **True**, the pathologist may preview cases in the **Preview Window** and then use the enabled **Sign button** to sign out cases. Click the **Preview button** to view the full report in the **Preview Window.**

3. After the Pathologist completely reviews the Case in the **Preview Window**, the Case is signed out by clicking the **Sign button**. The **Pathologist Signature Window** opens. The Pathologist assigned to the User account is highlighted in the list box. If this is not the Pathologist signing the Case, double click the correct Pathologist in the list. The Type column indicates whether each Pathologist is a Signer or Cyto Signer. Only Signers may sign out Cases from the **Quick Case Window**.

4. Enter the electronic signature password of the Pathologist signing out the Case. This is the Pathologist whose signature appears on the report along with the facsimile signature, if one is stored for the Pathologist. Click **Done**.

5. The **Really sign out** prompt is displayed. Click **Yes** to sign out the Case. Click **No** to cancel the operation. After sign out, the Case is now at the status *Needs Final Report*.

Charge Selection Window

Charges can be assigned either to the Case or to the Specimen. Charges can be applied manually or automatically if they are specified in the **Charges Library**.

The **Charge Selection Window**, shown in Figure 5, is used to view charges that are currently applied to a Case or to a Specimen. This window is also used to manually manipulate charges.

Figure 4 - **Charge Selection Window**

The **Charge Selection Window** is accessible from a variety of locations throughout **WindoPath**:

- *View Charges* from the **Pap Case Window** – *Case Menu*.
- *Charges* from the **Quick Case Window** – *Add/Delete Menu*.
- *Charges* from the **Accession Window** – *Case Menu*.
- *Charges* button in the **Prostate Resulting Window.**

Charge Selection Window Fields

- **Carrier** – displays the contents of the **Insured By field** from the **Patient Window**.
- **Find** – highlights the appropriate code in the **Charge Codes to Choose From List Box** based on entered criteria.
- **Count** – the number of times to add the charge from the **Charge Codes to Choose From List Box** to the **Charges Selected List Box.**

Charge Selection Window List Boxes

- **Specimen List Box** - lists all the Specimens on the Case. Clicking on each Specimen lists the charges that have been applied to the Specimen in the **Charges Selected List Box**. When the **Charge Selection Window** is first opened, the first Specimen on the Case is highlighted and the Specimen charges for this Specimen are listed in the **Charges Selected List Box**.

- **Charges Selected List Box** - lists the charges currently applied to either the Case or one of the Specimens, depending on which is currently selected.

- **Charge Codes to Choose From List Box** - lists all available charges defined in the **Charges Library**. This list actively reflects the type of charges currently displayed. For example, charges associated with Every Case are only displayed when the Case is check box is selected. To add a charge to a Case or Specimen, click the Case check box or highlight the Specimen in the **Specimen List Box** and then click on the appropriate charge in this list box. The charge is then added to the **Charges Selected List Box**.

Charge Selection Window Action Buttons

- **Reverse** – applies the currently selected billed charge in the **Charges Selected List Box** as a credit.

- **Release** – sets the Case charge release date to the current date.

- **New** – opens the **Charges Library** where a new charge code can be added.

- **Next –** not used.

- **Previous –** not used.

- **Done** – closes the **Charge Selection Window** applying all charges or credits listed in the **Charges Selected List Box**.

Charge Selection Window Check Box

- **Case Check Box** – click this box to view or modify charges applied to the Case. A check mark in the box indicates that Case charges are currently displayed.

Charge Selection Window Menu

Charge Selection Menu

- *Add Code* – **ALT+A** – adds the charge code highlighted in the **Charge Codes to Choose From List Box** to the selected Specimen or Case.

- *Enter Code* –**ALT+E** – moves the cursor to the **Find: field** to enter the code of the charge to be selected.

- *Load Case* – **CTRL+K** – opens a window where the user can enter the desired case number. Once you enter the case number and hit Enter or click the **Done button**, the **Charge Selection Window** changes to reflect the charges on the new case number.

- *Remove Code* – **ALT+SHIFT+A** – removes the charge code highlighted in the **Charges Selected List Box** from the selected Specimen or Case.

- *Toggle Case/Specimen* – **ALT+T** – toggle switch to display Case level charges (if Specimen charges are currently selected) or Specimen level charges (if Case charges are currently selected).

- *Send Outs Only* – **ALT+SHIFT+S** – filters the **Charge Codes to Choose From List Box** to display only charges flagged as **Send Out** in the **Charges Library**.

- *In House Only* – **ALT+SHIFT+I** – filters the **Charge Codes to Choose From List Box** to display only charges flagged as **In House** in the **Charges Library**.

Once charges are applied to a Case or a Specimen, they are available for processing, either by a Query billing report or an installed billing interface. A billing interface flags the individual charges as being billed on the current date.

Billed charges are flagged in the **Charges Selected List Box** with a billing date in the Bld. column.

Case and Specimen charges can be applied automatically if they are defined to do so in the **Charges Library**. Refer to *Chapter 11 – The Library* for more information.

Adding Charges

To add a charge to a Case or Specimen, open the **Charge Selection Window**.

1. Click the **Case Check Box** or the appropriate Specimen in the **Specimen List Box**.

2. Click the charge to be added in the **Charge Codes to Choose From List Box**. It is then displayed in the **Charges Selected List Box**.

3. Click **Done** or press **ENTER**.

Deleting Charges

To remove a charge from a Case or Specimen, open the **Charge Selection Window**.

1. Click the **Case Check Box** or the appropriate Specimen in the **Specimen List Box**.

2. Double click the charge to be removed in the **Charges Selected List Box**. It is then removed from the box. To delete multiple charges, highlight the desired charges, the select *Remove Code* from the *Charge Selection Menu* or type **ALT+SHIFT+A**.

3. Click **Done** or press **ENTER**.

Refer to the following section if the charge is flagged with a Billed Date as already having been billed.

Un-billing Charges

When double clicking on a charge that has a Billed Date, the message **This procedure has been billed. Issue a reversal** will be displayed. Responding **Yes** issues a credit.

Crediting Charges

To credit a charge that has already been billed, open the **Charge Selection Window**.

1. Click the **Case Check Box** or the appropriate Specimen in the **Specimen List Box**.

2. Click the charge(s) to be credited in the **Charges Selected List Box**. Hold the **CTRL** or **SHIFT** key to highlight multiple charges.

3. Click **Reverse**.

4. The charge is displayed in the **Charges Selected List Box** with the letter **Y** in the credit column.

5. Click **Done** or press **ENTER**.

Chapter 7 – Final Report and Report Distribution

Once Cases have been signed out, they have the status of *Needs Final Report*. This chapter describes the steps involved in report distribution.

If the *Reporting Menu's Auto Print Reports* toggle switch is on, the **Distribute multiple copies** box opens. Click **No** to print one copy of the report. Click **Yes** or press **ENTER** to print multiple copies. Multiple copies include one Original copy and one for each Physician associated with the Case. Billing, File and Medical Records copies may be printed if the preferences to do so are set to **True**. The report prints to the PC's default printer. The Case is now at the status *Needs Distribution*.

If the *Reporting Menu's Auto Fax/eMail Reports* toggle switch is on, the **Fax Selection Window** opens. Refer to the section entitled **Automatic Report Faxing at Case Sign Out** for more information.

Final Reports

Final reports can be printed individually when Cases are signed out. Final reports can also be printed in a batch and sorted in a specified order.

To print final reports in batch mode, you must first create a **Case List** containing Cases that need final reports. Click **Current Cases** on the **Dispatcher Window**. Click the Needs check box to open the *Case Needs Menu*. Highlight *Final Report* to select it. Once *Needs Final Report* is selected, the **Case List** displays only Cases that need final reports.

Cases can also be limited by Case type by clicking the Case Type check box.

Once a batch of Cases needing final reports has been listed in the **Case List**, the *Case Report Menu* is used to print Case reports. Although reports can be printed at any time, they are usually printed after the Case has been signed out. Select one of the printing options described in the section entitled **Printing Reports**.

Holding Final Reports

On occasion, you may wish to delay the printing of a final report for a Case. For instance, when waiting for the results of a consult. These cases can be set on hold until the final reports can be released.

Set On Hold

1. Select *Set on Hold* from the **Accession Window** – *Case Menu*; **Quick Case Window** – *Reporting Menu*; or **Case List Window** – *Case List Menu*.

2. A pop-up date entry box opens.

3. Enter the date and time until which the Case's final report should be held.

4. When the Case is signed out, the Case *Needs* are advanced to *Needs Release* instead of *Needs Final*.

Needs Release

Final reports for Cases at *Needs Release* may be printed at any time after the Set on Hold time has expired.

To manually advance cases from *Needs Release* to *Needs Final Report*, highlight the Case(s) in the **Case List** and press **CTRL+M**.

Printing Reports

Final Reports are most often printed from the *Case Report Menu* on the **Case List Window**. However, Final Reports may also be printed from the *Reporting Menu* on the **Quick Case Window** or from the **Preview Window**.

Printing Reports from the Case List Window, Case Report Menu

- *Preview Selected Cases* – opens the **Print Preview Window** (Figure 1) for the highlighted Case(s) in the Case List. Use the scroll bars or click **Scroll** to view the entire page and/or subsequent pages. Click **Done** to exit the **Print Preview Window**.
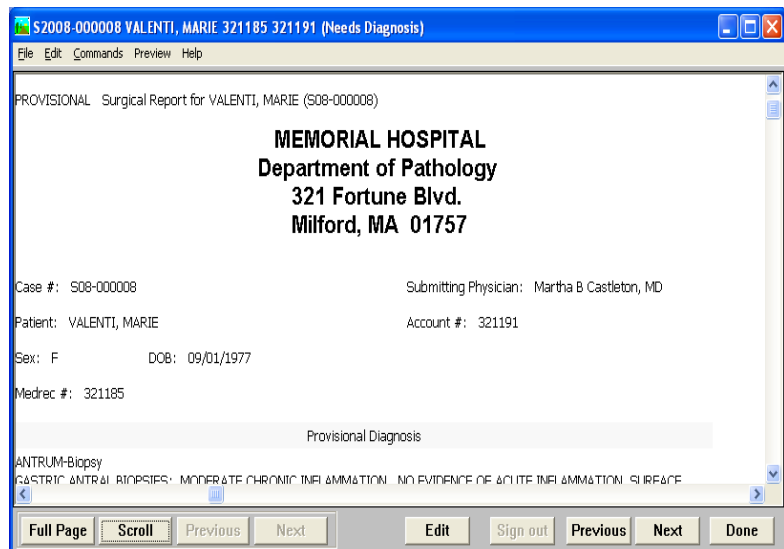

Figure 1 – **Print Preview Window**

- *Open PDF* – displays a preview of the Case report in Adobe Acrobat, if installed.

- *All Cases as Listed* – opens the standard print window to print reports for the entire batch of cases in the **Case List**. With this option, reports are sorted in the order in which they appear in the **Case List**.

- *Selected Cases Only* – opens the standard print window to print reports for the currently highlighted Case(s) in the **Case List**.

- *Schedule Next Report* – Selecting this toggles a check mark on and off next to it. When the item is checked, the next collated report that is selected will open a Scheduled Report window instead of actually printing. The Scheduled Report window will be loaded with the parameters of the report that would have printed. In order to save this report, the user must enter a code and press the **Done button**. After the window closes, the Case List Window remains open and the check mark next to the menu item is removed. This allows a user to schedule a report directly from the case list window.

- *Collate by Current Check Box* – reports are printed in order based on the check box currently selected in the **Case List Window**. For example, if the *Needs* check box is selected, reports will be printed on order by Case *Needs*.

- *Collate by Physician Group* – allows Case reports to be printed to individual Physician printers. With this option, the primary sort is by Stop, the secondary sort is by Group and the tertiary sort is by Physician. Refer to the section entitled **Collating Reports** for more information. Also refer to the section entitled **Physician Fax Window** in *Chapter 10 – Human Resources* for information on setting up Physicians to receive collated reports.

- *Collate by Physician Location* – allows Case reports to be printed to individual Physician printers. With this option, the primary sort is by Physician, the secondary sort is by Location and the tertiary sort is by Case Number. Refer to the section entitled **Collating Reports** for more information. Also refer to the section entitled **Physician Fax Window** in *Chapter 10 – Human Resources* for information on setting up Physicians to receive collated reports.

- *Collate by Submitter* – opens the standard print window to print reports for the batch of Cases currently in the **Case List**. With this option, the reports are sorted in Submitter order.

- *Select by Case Number Range* – opens the **Report Case Number Range Box** where you can enter a range of Case numbers to print.

- *Select by Received Date Range* – opens the **Date Time Dialog** where you can enter a range of received dates to print.

- *Select by Sign Out Date Range* – opens the **Date Time Dialog** where you can enter a range of sign out dates to print.

- *Fax/eMail All Cases* – faxes and/or e-mails all signed out Case reports currently in the **Case List**. Facsimile reports are automatically sent to all Case Physicians if they meet the criteria listed in the section entitled **Fax Criteria**.

- *Fax/eMail Selected Cases* – opens the **Fax Selection Window,** shown in Figure 2. This window allows you to specify which Physicians should receive a single facsimile/e-mailed report for the currently highlighted Case(s).

- *Fax/eMail to Specified Recipients* – opens the **Fax Selection Window,** shown in Figure 2. This window allows you to specify which Physicians from the **Physicians Library** should receive a single facsimile/e-mailed report for the currently highlighted Case(s). You can also enter a fax/e-mail recipient by typing free text.

- **Compress Reports –** used to decrease the font size of the current report in order to achieve a more compressed or 1 page report. This item opens a prompt for the User to enter a number value to compress the report by.

- *Show Report Definition* – displays the report template (defined in the **Formatter**) that will be used when printing the report for this Case.

- *Show Scheduled Reports* – opens the **Scheduled Report Library List Window.**

Printing Reports from the Quick Case Window, Reporting Menu

Refer to the section entitled **Quick Case Window Menus – Reporting Menu** in *Chapter 4 – Current Cases, Grossing and Result Entry.*

Printing Reports from the Print Preview Window

Users may sign out and print reports from the **Print Preview Window** with Preference O387, **Allow sign out from the Preview Window**, set to **True**.

The **Print Preview Window** is accessible from a variety of locations throughout **WindoPath**:

- *Preview Selected Cases* from the **Case List Window** – *Case Report Menu*.

- *Print Preview* from the **Quick Case Window** – *Reporting Menu*.

- The *Preview button* from the **Quick Case Window**.

- *Preview* from the **Prostate Result Window** – *Prostate Menu*.

- The *Preview button* from the **Prostate Result Window**.

- *Print Preview* from the **Pap Case Window** – *Case Menu*.

- The *Preview button* from the **Pap Case Window**.

Collating Reports

The Collate function allows Case reports to be printed in a batch and sorted in a specific order to individual Physicians' networked printers. Optionally, a copy of every Case report printed may be printed to specified departments, such as Medical Records or Billing.

A print queue for each Physician's printer must be installed on every PC that will be printing collated reports.

A printer must be selected for each Physician in the **Physician Fax Window**. Refer to the section entitled **Physician Fax Window** in *Chapter 10 – Human Resources* for instructions on setting up Physician print locations.

Batch Printing Final Reports Collated by Current Check Box

When collating by Current Check Box, reports are not printed to individual physician printers, but to the printer selected in the standard print window. This feature will print out the cases in order of the Check Box you have selected in the Case List Window.

1. Click **Current Cases** on the **Dispatcher** to open the **Case List Window**.

2. Select the cases you wanted printed.

3. Click any Check Box you prefer in the **Case List Window** to use as the sort order.

4. Select *Collate by Current Check Box* from the *Case Report Menu*.

5. Respond **Yes** or **No** to the **This will collate by xxxx** prompt.

6. Respond **Yes** or **No** to the **Also fax x cases for y physicians that are eligible for faxing** prompt.

7. Select the printer to which you would like all of your reports printed and click the **Print button**.

8. Respond **Yes** or **No** to the **Send faxes** prompt.

9. Each Case report will be printed to the selected printer.

10. Reports are sorted in order according to the Current Check Box.

Batch Printing Final Reports Collated by Physician Location

1. Click **Current Cases** on the **Dispatcher** to open the **Case List Window**.

2. Filter the **Case List** to those Cases that have a status of *Needs Final Report*. Click the Needs check box to open the *Case Needs Menu*. Highlight *Final Report* to select it. Once *Needs Final Report* is selected, the **Case List** displays only Cases that need final report.

3. Optionally filter the **Case List** by Case Type using the same method as for *Needs*.

4. Select *Collate by Physician Location* from the *Case Report Menu*.

5. Respond **Yes** or **No** to the **Also fax x cases for y physicians that are eligible for faxing** prompt.

6. Respond **Yes** or **No** to the **Include historical cases** prompt.

7. Each Case report will be printed to the appropriate printer selected for each Physician in the **Physician Fax Window**.

8. If any Physician (department) has been designated as **Assign to All Cases**, a copy of each Case report printed will also be printed to the printer specified for that department in the **Physician Fax Window**.

9. If any Physician (department) has been designated as **Assign to Location**, a copy of each Case report printed for each matching location will also be printed to the printer specified for that department in the **Physician Fax Window**.

10. Reports are sorted in the following order: first, by Physician; second, (within each Physician batch), by Location; and third, (within each Location batch), by Case Number.

Batch Printing Final Reports Collated by Physician Group

1. Click **Current Cases** on the **Dispatcher** to open the **Case List Window**.

2. Filter the **Case List** to those Cases that have a status of *Needs Final Report*. Click the Needs check box to open the *Case Needs Menu*. Highlight *Final Report* to select it. Once *Needs Final Report* is selected, the **Case List** displays only Cases that need final report.

3. Optionally filter the **Case List** by Case Type using the same method as for *Needs*.

4. Select *Collate by Physician Group* from the *Case Report Menu*.

5. Respond **Yes** or **No** to the **Also fax x cases for y physicians that are eligible for faxing** prompt.

6. Respond **Yes** or **No** to the **Include historical cases** prompt.

7. Each Case report will be printed to the appropriate printer selected for each Group in the **Physician Fax Window**.

8. If the reserved preference **When collating by group, include physician copy** is set to **True**, a copy of each report printed will also be printed for each Physician associated with the Case.

9. If any Physician (department) has been designated as **Assign to All Cases**, a copy of each Case report printed will also be printed to the printer specified for that department in the **Physician Fax Window**.

10. If any Physician (department) has been designated as **Assign to Location**, a copy of each Case report printed for each matching location will also be printed to the printer specified for that department in the **Physician Fax Window**.

11. Reports are sorted in the following order: first, by Stop; second, (within each Stop batch), by Group; and third, (within each Group batch), by Physician.

Batch Printing Final Reports Collated by Submitter

When collating by Submitter, reports are not printed to individual physician printers, but to the printer selected in the standard print window.

1. Click **Current Cases** on the **Dispatcher** to open the **Case List Window**.

2. Filter the **Case List** to those Cases that have a status of *Needs Final Report*. Click the Needs check box to open the *Case Needs Menu*. Highlight *Final Report* to select it. Once *Needs Final Report* is selected, the **Case List** displays only Cases that need final report.

3. Optionally filter the **Case List** by Case Type using the same method as for *Needs*.

4. Select *Collate by Submitter* from the *Case Report Menu*.

5. Respond **Yes** or **No** to the **Also fax x cases for y physicians that are eligible for faxing** prompt.

6. Respond **Yes** or **No** to the **Include historical cases** prompt.

7. The standard print window opens. Select the appropriate printer and click **Print**.

8. Reports are sorted in the following order: first, by Physician and second, (within each Physician batch), by Case number.

Batch Printing Final Reports with Attached Case Documents

When printing final reports, if any of the Cases being printed have documents that are flagged as **print**, the documents will print after the batch of reports.

Faxing Reports

Reports can be faxed individually or in a batch as described in the section entitled **Case Report Menu**.

Fax Criteria

Fax Criteria for Single Reports

In order for a Physician to receive a facsimile report, the following criteria must be met:

1. A Fax number is entered on the **Physician Fax Window**.

Fax Criteria for Batch Reports

In order for a Physician to receive a facsimile report, the following criteria must be met:

1. A Fax number is entered on the **Physician Fax Window**.

2. **Report and Fax/eMail** or **Fax/eMail Only** is selected under the **How to Report** options on the **Physician Fax Window**.

3. **Days of the Week** check boxes are checked on the **Physician Fax Window**.

4. **The Cases must be signed out.**

Single Report Faxing to a Single Recipient

1. Highlight the Case in the **Case List**.

2. Select *Fax/eMail to Specified Recipients* from the *Case Report* menu.

3. Each location for each Physician associated with the Case is listed in the **Fax Recipient List Box**.

4. If necessary, add Physicians to the **Fax Recipient List Box** as described in the section entitled **Fax Selection Window**.

5. In the **Fax Recipient List Box**, highlight each Physician location to receive a copy of the report.

6. Click **Send** to send specified faxes to the fax queue.

7. Each Physician in the **Fax Recipient List Box** will receive one copy of the selected Case report. Reports will be sent from the fax queue at the date and time specified in the **Physician Fax Window**. If no time has been specified, reports will be sent from the fax queue on the day they were faxed in the order in which they were received.

Multiple Report Faxing to a Single Recipient

1. Highlight the Cases in the **Case List**.

2. Select *Fax/eMail to Specified Recipients* from the *Case Report* menu.

3. Each location for each Physician associated with the Case is listed in the **Fax Recipient List Box**.

4. If necessary, add Physicians to the **Fax Recipient List Box** as described in the section entitled **Fax Selection Window**.

5. In the **Fax Recipient List Box**, highlight each Physician location to receive a copy of the reports.

6. Click **Send** to send specified faxes to the fax queue.

7. Each Physician in the **Fax Recipient List Box** will receive one copy of each of the selected Case reports. Reports will be sent from the fax queue at the date and time specified in the **Physician Fax Window**. If no time has been specified, reports will be sent from the fax queue on the day they were faxed in the order in which they were received.

Batch Report Faxing

1. Filter the **Case List** to include all reports to be batch faxed.

2. Select *Fax/eMail All Cases…* from the *Case Report Menu*.

3. All eligible Case reports will be sent to the fax queue. Refer to the section entitled **Fax Criteria for Batch Reports** for a list of eligibility requirements.

4. Reports will be sent from the fax queue at the date and time specified in the **Physician Fax Window**. If no time has been specified, reports will be sent from the fax queue on the day they were faxed in the order in which they were received. If a Physician has more than one report in the queue, all reports for that Physician are sent under one fax cover page.

Automatic Report Faxing at Case Sign Out (Auto Faxing)

Automatic Faxing (Individual Cases)

From the Accession Window:

Select *Fax/eMail on Sign Out* from the *Case Menu*. There will now be a check mark next to this menu item. When the Case is signed out, the **Fax Selection Window** opens. Refer to the next section entitled **Fax Selection Window**.

Automatic Faxing (All Cases)

From the Quick Case Window:

Select *Auto Fax/eMail Reports* from the *Reporting Menu*. There will now be a check mark next to this menu item. When each Case is signed out, the **Fax Selection Window** opens. Refer to the next section entitled **Fax Selection Window**.

From the Pap Case Window:

Select *Auto Fax/eMail* from the *Case Menu*. There will now be a check mark next to this menu item. When each Case is signed out from the **Pap Case Window**, the **Fax Selection Window** opens. Refer to the next section entitled **Fax Selection Window**.

Fax Selection Window

The **Fax Selection Window**, shown in Figure 2, contains the **Fax Recipient List Box** listing all Physicians associated with the Case.

Figure 2 – **Fax Selection Window**

Fax Selection Window Columns

- **Code** – the Physician code and print/fax/e-mail location as specified in the **Physician Window** and **Physician Fax Window**.

- **Name** – the Physician's name.

- **Fax or eMail** – the Physician's fax number as specified in the **Fax field** of the **Physician Fax Window**. If an e-mail address has been entered in the **eMail field** of the **Physician Fax Window**, that address is displayed in this column.

Fax Selection Window Fields

- **Code** – free text field for manual entry of additional fax recipients. Refer to the section entitled **Adding Fax Recipients From the Physicians Library**.

- **Name** – free text field for manual entry of additional fax recipients. Refer to the section entitled **Adding Other Fax Recipients**.

- **eMail or Fax** – free text field for manual entry of additional fax recipients. Refer to the section entitled **Adding Other Fax Recipients**.

Fax Selection Window List Box

- **Fax Recipient List Box** – by default, lists each Physician associated with the case. Additional fax recipients may be added to the list manually either from the **Physicians Library** or by free text entry. Refer to the sections entitled **Adding Fax Recipients From the Physicians Library** and **Adding Other Fax Recipients**.

Fax Selection Window Action Buttons

- **Add** – adds the recipient listed in the free-text fields to the **Fax Recipient List Box** to receive facsimile reports.

- **Add Physician Location** – opens the **Select Physician Window**, which displays the complete Physicians Library, allowing the user to select and add a specific physician's Fax Location to the **Fax Recipient List Box.**

- **Cancel** – closes the **Fax Selection Window** without sending any facsimile reports.

- **Send** – closes the **Fax Selection Window**, sending a facsimile report for the highlighted Physicians in the **Fax Recipient List Box** to the fax queue. The reports are sent according to the date and time specified or on the day they were faxed in the order in which they were received.

Other recipients can be added to the **Fax Recipient List Box** by entering the appropriate information in the **Code**, **Name** and **Fax Number** fields.

Adding Fax Recipients from the Physicians Library

To add a fax recipient from the **Physicians Library**, either click the **Add Physician Location button** or type the code of the Physician in the **Code field**. All of the Physician's fax locations from the **Physicians Library** will be loaded into the **Fax Recipient List Box**.

Adding Other Fax Recipients

To add any other fax recipient, type the name and fax number (or e-mail address) in the **Name field** and **eMail or Fax field**. Click in the **Code field**. The **Add button** becomes available. Click **Add** to add the recipient to the **Fax Recipient List Box**.

Selecting Fax Recipients

Fax recipients must be highlighted in the **Fax Recipient List Box** in order to receive a fax/e-mail. Click on the desired recipients to highlight them.

Sending Faxes

Highlight each recipient in the **Fax Recipient List Box** who is to receive a facsimile of the Case report. Each recipient must have a Name and Fax Number (or e-mail address) listed. If the Name or Fax Number (or e-mail address) is not listed for any selected recipient, no facsimile report will be sent to that recipient. Click **Send** to send a facsimile report for the highlighted recipients in the **Fax Recipient List Box** to the fax queue. The reports are sent according to the date and time specified for the Physician or on the day they were faxed in the order in which they were received.

Completing Cases

The final case status for every case is always *Needs Complete.* Various, preference-driven option can occur upon completing a case.

Once Cases are flagged as *Complete*, they cannot be modified by any User. You must create a corrected Case to make changes unless you are adding procedures, modifying charges, adding SNOMED or ICD Codes or adding a supplemental report.

Cases must be flagged as *Complete* in order to be eligible for deactivation. Deactivated cases no longer appear in the current Case List, but may be looked up from the Archives. Refer to *Chapter 14 – Manager's Guide* for more information about the deactivation program.

Distribution Step

Once final reports have been printed, the Case *Needs* advance to *Needs Distribution*. The Distribution step is the last opportunity to make modifications to a Case.

Cases that have the status of *Needs Distribution* can still be modified by the signing Pathologist. Any User with a Pathologist associated with his/her User account in Human Resources is eligible to modify that Pathologist's Cases prior to Case completion.

If you want to advance Cases from *Final Report* to *Complete* without having a *Distribution* step, set the reserved preference S66, **Flag distributed automatically**, to **True**. (**True**: Case Needs advance from Needs Final Report to Complete after final reports are printed. Cases may not be modified once they have reached the stage Complete.)

Advancing Cases to Complete

To flag Cases as *Complete*, create a **Case List** containing any Cases at *Needs Distribution* or *Needs Final Report* that you want to complete.

Press **CTRL+A** to select all Cases in the Case List and select *Advance Selected Cases* from the *Case List Menu* or press **CTRL+M** to flag all Cases in the **Case List** as *Complete*.

These Cases are eligible to be deactivated the next time the deactivation program runs. Cases with pending Procedures, Consults or Add-Ons are not eligible for deactivation.

Quickest Path to Signing Out, Printing & Completing Cases

The following steps describe the quickest path to signing out Cases, printing final reports and completing Cases.

Sign Out

1. Click **Current Cases** on the **Dispatcher** to open the **Case List Window**.

2. Filter the **Case List** to those Cases that have a status of *Needs Signature*. Click the Needs check box to open the *Needs Menu*. Highlight *Signature* to select it. Once *Needs Signature* is selected, the **Case List** displays only Cases that need signatures.

3. Optionally filter the **Case List** by Case Type using the same method as for *Needs*.

4. Use the mouse or arrow keys to highlight the bottom (lowest numerically) Case in the **Case List**.

5. Double click on the Case or click **Open** to open the **Quick Case Window**.

6. Review all information on the Case in the **Full tab**. The Patient's history can be reviewed by clicking **History** at the bottom of the window. Patient histories can also be displayed automatically for subsequent Patients by selecting *Auto Display History* from the *Reporting Menu*. The Patient's **History Window** is displayed before each Case is displayed in the **Quick Case Window**.

7. Make any modifications to the Case by editing the text in the appropriate tabs.

8. Click **Sign** or press **ALT+X** to open the **Pathologist Signature Window**.

9. Enter the electronic signature password of the Pathologist signing out the Case. This is the Pathologist whose signature appears on the report, along with the facsimile signature, if one is stored for the Pathologist.

10. Click **Done** or press **ENTER**.

11. The **Charge Selection Window** automatically opens if the site wide preference to **Review charges at sign out** is set to **True**.

12. Add or delete charges for the Case and/or Specimen(s) as necessary.

13. Click **Done** or press **ENTER** on the **Charge Selection Window**.

14. If you are not automatically printing reports at sign out, the Case *Needs* are now at *Needs Final Report*. Skip the next 2 steps. If *Auto Print Reports* has been specified, the **Distribute multiple copies** prompt is displayed.

15. At the **Distribute multiple copies** prompt, click **No** to print one copy of the report. Click **Yes** or press **ENTER** to print multiple copies. Multiple copies include one original copy and one for each Physician associated with the

Case. Billing, File and Medical Records copies may be printed if the preferences to do so are set to **True**.

16. The standard print window opens. Verify the selected printer and click **OK** or press **ENTER**. The Case *Needs* are advanced to *Needs Distribution* (or *Complete* if the reserved preference **Flag distributed automatically** is set to **True**).

17. Click **Next** or press **CTRL+N**, to display the next Case in the **Case List**. If *Auto Display History* was previously selected, the **History Window** for the next Patient is displayed.

18. Repeat from step #6 for each Case.

19. When all Cases have been signed out, click **Done** to close the **Quick Case Window**.

If final reports were automatically printed as Cases were signed out, the Case *Needs* are at *Needs Distribution*. In this case, the next procedure that describes the steps to batch print reports is omitted.

If final reports were not automatically printed as Cases were signed out, final reports are batch printed using the following procedure.

Batch Sign Out

1. Click **Current Cases** on the **Dispatcher** to open the **Case List Window.**

2. Filter the **Case List** to those Cases that have a status of *Needs Signature*. Click the Needs check box to open the *Needs Menu*. Highlight *Signature* to select it. Once *Needs Signature* is selected, the **Case List** displays only Cases that need signatures.

3. Optionally filter the **Case List** by Case Type using the same method as for *Needs*.

4. Type **CTRL+A** to highlight all Cases.

5. Select *Sign Out Selected Cases* from the *Case List Menu*.

6. Enter the electronic signature password of the Pathologist signing out the Case. This is the Pathologist whose signature appears on the report, along with the facsimile signature, if one is stored for the Pathologist.

7. Respond **Yes** to the **all cases needing signature will be signed** prompt.

Batch Printing Final Reports

1. Click **Current Cases** on the **Dispatcher** to open the **Case List Window**.

2. Filter the **Case List** to those Cases that have a status of *Needs Final Report*. Click **Needs** to open the *Case Needs Menu*. Highlight *Final Report* to select it. Once *Needs Final Report* is selected, the **Case List** displays only Cases that need final report.

3. Optionally filter the **Case List** by Type using the same method as for *Needs*.

4. Choose the parameter by which you want the reports sorted from the *Case Report Menu*. You can sort the reports by Physician Group, Physician Location, Submitter, Case Number range, Received Date range or Sign Out Date range. The **Distribute multiple copies** prompt is displayed.

5. At the **Distribute multiple copies** prompt, click **No** to print one copy of the report. Click **Yes** or press **ENTER** to print multiple copies. Multiple copies include one original copy and one for each Physician associated with the Case. Billing, File and Medical Records copies may be printed if the preferences to do so are set to **True**.

6. Depending on the sort method selected, the standard print window may open. Verify the selected printer and click **OK** or press **ENTER**. The Case *Needs* advance to *Needs Distribution* (or *Complete* if the reserved preference **Flag distributed automatically** is set to **True**).

After final reports are printed and no modifications need to be made, use the following steps to flag Cases as complete:

Completing Cases

1. Filter the **Case List** to those Cases that have a status of *Needs Distribution*. Click the Needs check box to open the *Case Needs Menu*. Highlight *Distribution* to select it. Once *Needs Distribution* is selected, the **Case List** displays only Cases that need distribution.

2. Optionally filter the **Case List** by Case Type using the same method as for *Needs*.

3. Press **CTRL+A** to select all Cases in the Case List and select *Advance Selected Cases* from the *Case List Menu* to flag all Cases in the **Case List** as *Complete*.

4. Click **Done** to close the **Case List Window**.

Cases are now flagged as *Complete* and are available for deactivation. Cases with pending Procedures, Consults or Add-Ons are not eligible for deactivation.

Sign Out & Final Report Options

The following details other Sign Out and Final Report Options and Tasks.

Include Historical Cases Prompt

If the User preference **Prompt to print historical cases when printing reports** is set to **True**, when any of the printing or faxing menu options are selected, you will be prompted with the message **Include historical cases**. Click **Yes** or press **ENTER** to print the Related Cases section on the report(s) (if Related Cases is a selected section in the **Formatter** for the current report definition.) This section includes all past Diagnoses for the Patient.

Distribute Multiple Copies Prompt

When any of the printing or faxing menu options is selected, you will be prompted with the message **Distribute multiple copies**. Click **Yes** to print a separate report for each of the Patient's Physicians and one original copy labeled appropriately. Billing, File and Medical Records copies may be printed if the preferences to do so are set to **True**. Click **No** to print one copy of the report, labeled **Original Copy** or **Duplicate Copy**.

Save Original Reports

Set the site wide preference **Save Original Reports** to **True**. When this preference is enabled, every time a Case is advanced from *Needs Distribution* to *Complete*, a .jpg image of the report is saved to an **Original Reports** directory on the server. Each page of the report is saved as a separate .jpg file. Files are saved in the format S2015-000001_p1.jpg. When printing reports, if an original report exists for any Case, the message **Printing report from saved report image** is displayed.

By preference, original reports can also be saved in .bmp or .pdf formats.

Supplemental Reports

Supplemental Reports may be added to Cases after they have reached the stage *Complete*. There are two types of Supplemental Reports: unsigned and signed.

Unsigned Supplemental Reports

Unsigned Supplemental Reports are entered in the **Sup Rep tab** of **the Quick Case Window**. You can enter free text in this tab or press **CTRL+L** to display entries from the **Paragraphs Library**.

If the site wide preference **Require signature on supplementals** is set to **True**, the Sup Rep tab will not accept text entry. Supplemental Reports must be entered as Signed Supplementals from the **Add-Ons Check Box** on the **Quick Case Window**.

Signed Supplemental Reports

Signed Supplemental Reports are entered from the **Add-Ons Check Box** on the **Quick Case Window**. Select the **Supplemental Report** type on the **Add-On Window**. These Supplemental Reports must be signed out by a Pathologist.

To restrict Users to Signed Supplemental Reports only, set the site wide preference **Require signature on supplementals** to **True**.

Corrected (Amended) Cases

You cannot change the Patient or Visit on a corrected Case. To modify the Patient or Visit on a completed Case, you must remove the Case from history and reaccession the Case on the correct Patient and/or Visit or use the Switch Patient/Switch Visit function.

Once a Case has reached the status Complete, it cannot be modified by any User. (Exceptions are adding procedures, charges, consults or supplemental reports). To modify a completed Case, you must issue a corrected (amended) Case.

Creating a Corrected Case (all Case types except Pap):

1. Open the **Quick Case Window** for the Case.

2. Select *Correct Case* from the *Modify Menu*.

3. A duplicate Case is created, appending .1 to the original Case number (or .2, .3 etc. for subsequent corrections of the same Case.) Corrected Cases are created at the status *Needs Correction*.

4. In the **Reason** tab, enter the reason for Case correction. You can type free text in the tab or press **CTRL+L** to display entries from the **Paragraphs Library**.

5. Make any necessary changes to the Case.

6. Sign out the Case.

Creating a corrected Case (Pap only):

1. Open the **Pap Case Window** for the Case.

2. Select *Corrected Case* from the *Case Menu*.

3. In the **Reason Window**, enter the reason for the Case correction. You can type free text in this window or press **CTRL+L** to display entries from the **Paragraphs Library**. Click **Done**.

4. A duplicate Case is created, appending .1 to the original Case number (or .2, .3 etc. for subsequent corrections of the same Case.) Corrected Cases are created at the status *Needs Correction*.

5. Make any necessary changes to the Case.

6. Sign out the Case.

Removing Cases from History

On occasion, Cases might inadvertently be accessioned on an incorrect Patient or Visit. This can result in an incorrect diagnosis appearing on a Patient history. To correct this problem, you can remove the Case from history. Only users with *Manager* privileges can remove Cases from history.

1. Set the site wide preference **Allow removal of Cases from history by managers** to **True**.

2. Highlight the desired Case in the **Case List**.

3. Select *Delete Selected Cases* from the *Case List Menu*.

4. Respond **Yes** to the prompt **Really delete these cases**.

5. Click **OK** on the information message **Case is signed. Cannot delete**.

6. Respond **Yes** to the prompt **Remove case from history**.

7. The **enter reason for removal** window opens. Enter the reason and click **Done**.

8. The Case number will be appended with an 'e' to indicate that the Case is erroneous. Cases flagged with an 'e' do not appear on Patient histories.

9. You can now reaccession the Case on the correct Patient and/or Visit, using the original Case number.

If a Case was accessioned on an incorrect Patient or Visit and has not yet been signed out, the Case may be modified using the *Switch Patient* or *Switch Visit* menu items from the **Case List Window** – *Select Menu*.

Unremoving Cases from History

If a Case has been erroneously removed from history, the Case may be returned to history by selecting *Unremove From History* from the *Case List Menu*. Highlight the Case(s) to be returned to history in the Case List. Select *Unremove From History*.

Respond Yes to the **Remove the 'e' flag** prompt. The 'e' flag will be removed from the Case number and the Diagnoses on this Case will appear in the Patient's history.

Switch Patient/Switch Visit

Switch Patient

Selecting *Switch Patient* from the **Case List Window** – *Select Menu* opens the **Switch Patient Window**, allowing the User to move Visits and all their Cases to a different Patient. Only Users with *Manager* privileges may switch a Case to a different Patient. *This menu item is available only if the Case is still modifiable.*

Highlight each Case to be switched in the Case List. Select *Switch Patient* to open the **Switch Patient Window**.

In the top list box, select all Visits to be switched to another Patient.

In the **Medrec field**, enter the Medical Record Number of the new Patient and press **TAB**. Alternately, you can enter the name of the new Patient in the **Name field** and press **TAB**.

In the bottom list box, select the new Patient. Click **Switch** to complete the Visit and Case move to the new Patient.

Switch Visit

Selecting *Switch Visit* from the **Case List Window** – *Select Menu* prompts the User to move the Case currently highlighted in the Case List to a different Visit. Responding **Yes** will prompt the User to enter a Visit account number. (The Case may be switched to a Visit belonging to the same Patient or to a different Patient). If a valid account number is entered, the User is prompted to confirm moving the case to the new Visit (and/or Patient, if the account number belongs to a different Patient). Responding **Yes** completes the Case move to the new Visit (and/or Patient.) *Only Users with Manager privileges can switch Visits/Cases to a different Patient. This menu item is available only if the Case is still modifiable*

Chapter 8 – Pap Cases

WindoPath's Pap Case Type and Cytology Module features a unique result entry window for Cytology cases, modeled after the Bethesda outline and designed with the Cytotech in mind. It prompts the user to make a decision on adequacy and pick a Bethesda category type. The user indicates organisms and other additional findings as well as adds specific notes for the Pathologist to consider when reviewing the case. This module supports the creation of physician specific reflex rules for cytology standards at any point in the workflow. You are also able to display molecular results directly on your screen, do partial and blended reporting and add standard disclaimers and educational messages to your reports.

Set Up for Pap Cytology Cases

Enabling the WindoPath Cytology Module

To enable the WindoPath Cytology Module, please ask your Application Specialist for assistance. He or she will set certain **Reserved Preferences** for you which will permit cytology processing into the WindoPath LIS database including GYN Pap Cases as well as Non-GYN Cytology Cases.

Pap and Other Cytology Case Types

All Pap and Cytology cases accessioned into WindoPath require the use of specific case types**.** Please see *Chapter 11 – The Library* for more information.

All Pap Case Types for GYN Cytology require the use of one of the 20 available **Pap Case Classes**; for example, **Pap1Case**, **Pap2Case**, **Pap3Case**, etc.

A Case Type's defined Case Class helps WindoPath determine specific workflows for cases, advance cases to specific case statuses and will enable other related functionality within the system.

Use of the **Pap Case Class** will follow the specific **WindoPath Pap Case Type Module's Workflow**. Specifically, when a user opens a Pap case type WindoPath will open the **Pap Result Window** for result entry RATHER than the Quick Case Window. After accession, a Pap Case's **Needs Status** will advance to **Needs Diagnosis** rather than **Needs Gross** as it does with surgical cases.

Likewise, Non-GYN Case Types for Non-GYN Cytology require the use of one of the 10 available **Non-GYN Case Classes**; for example, **NonGYN1Case**, **NonGYN2Case**, **NonGYN3Case**, etc.

Use of the **Non-GYN Case Class** will follow the same workflow of that of Pap Cases, described above.

The third and last Case Type available for Cytology Processing is the **Cytology Case Type** and its respective **Cytology Case Class, CytologyCase.** This Case Class was intended to be used for exception cytology cases.

Unlike Pap cases and Non-GYN cases, a Cytology case type will be resulted in the **Quick Case Window** rather than the Pap Window. This is the popular alternative to using the Non-GYN Case Class for non-GYN cases and specimens.

Accessioning Pap Cases

Outlined below are two methods of accessioning Pap Cases. The first method details the batch accessioning of all Patients, Visits and Cases in the **Accession Window**, then batch resulting Cases from the **Pap Case Window**. The second method details accessioning and resulting each Case individually before moving on to the next Case. Please review each method and choose the one that best fits your workflow.

Batch Pap Case Accessioning and Resulting

1. Create or look up the Patient and Visit in the **Accession Window** (described in *Chapter 2 – Patients & Visits*.)

2. Create the Case in the **Accession Window** (described in *Chapter 3 – Accessioning*.)

3. The Specimen is entered automatically based on the Source defined as the Default Pap Source. Refer to *Chapter 15 – Preferences* for information on setting the Default Pap Source.

4. Click the **Patient tab** to bring it forward and press **CTRL+N** to clear the fields of the **Patient tab**.

5. Repeat from Step 1 until all Cases have been entered.

6. Click **Done** on the **Accession Window**.

7. Click **Current Cases** to open the **Case List Window**.

8. Filter the *Type Menu* to *Pap* and *Needs Menu* to *Diagnosis*.

9. Open the bottom (lowest numerically) Case in the **Case List** by double clicking on it or click **Open**.

10. Enter the Adequacy, Categorization and sign/flag out the Case as described later in this chapter.

11. Click **Next** to open the next Case in the **Case List**.

12. Repeat from Step 10 until all Cases have been resulted.

Individual Pap Case Accessioning and Resulting

1. Create or look up the Patient and Visit in the **Accession Window** (described in *Chapter 2 – Patients & Visits*.)

2. Create the Case in the **Accession Window** (described in *Chapter 3 – Accessioning*.)

3. The Specimen is entered automatically based on the Source defined as the Default Pap Source. Refer to *Chapter 15 – Preferences* for information on setting the Default Pap Source.

4. Select the *Navigation Menu's **Result Entry*** menu item or press **CTRL+R** to open the **Pap Case Window** for the current Case.

5. Enter the Adequacy, Categorization and sign/flag out the Case as described later in this chapter.

6. Click **Done** on the **Pap Case Window** to return to the **Accession Window**.

7. Click the **Patient tab** to bring it forward and press **CTRL+N** to clear the fields of the **Patient tab**.

8. Repeat from Step 1 until all Cases have been entered and resulted.

Pap Worksheets

If you prefer to use paper worksheets while performing the microscopic interpretation, Pap Worksheets can be printed from the **Case List Window** – *Worklist Menu*.

1. Click **Current Cases** to open the **Case List Window**.

2. Filter the *Type Menu* to *Pap* and *Needs Menu* to *Diagnosis* or *Signature* if the User preference **Default Pap Case to Within Normal Limits** is set to **True**.

3. Press **CTRL+A** to highlight all Cases in the **Case List**.

4. Select *Pap Worksheets* from the *Worklist Menu*.

5. The standard print window will open. Verify the printer and click **OK**.

6. Individual worksheets are printed for each Pap Case in the **Case List**.

7. Fill out each worksheet.

8. Open the bottom (or first) Case in the **Case List** by double clicking on it or click **Open**.

9. Enter the Adequacy, Categorization and sign out the Case (if privileges allow) as described earlier in this chapter.

10. Click **Next** to open the next Case in the **Case List**.

11. Repeat from Step 9 until all Cases have been resulted.

Pap Case Result Window

Since Pap Cases and Non-GYN Cytology Cases are processed differently than other Case types, they are described separately in this chapter. All Cases, including Pap Cases, are accessioned in the **Accession Window** as described in *Chapter 3 – Accessioning*. However, Pap results are entered in the **Pap Case Window**, shown in Figure 1, as opposed to the **Quick Case Window** where other Case types are resulted.

Figure 1 - **Pap Case Window**

Pap Cases are usually resulted by a Cytotechnologist (User associated with a *Cyto Signer*.) Refer to *Chapter 10 - Human Resources* for more information on User security.

In addition, each Cytotechnologist should have his/her own Pathologist account in **Human Resources**, each with a unique electronic signature password for signing out Cases.

Pap Case Window Fields

- **Pathologist** – the name of the Pathologist assigned to the Case.

- **Patient** – the Patient's name in the format *lastname, firstname*.

- **Acces** – the initials of the User who accessioned the Case.

- **Submitter** – the name of the Physician who submitted the Case.

- **Collected/Received** – the dates the Specimen was collected and received in the laboratory.

- **Source** – the Specimen Source.

- **LMP** – the date of the Patient's last menstrual period.

- **Status** – optional status related to the Case.

- **MedRec** – the Patient's Medical Record Number.

- **Acct** – the Patient's account or billing number.

- **Sex** – the Patient's sex.

- **Age** – the Patient's age at the time of the Visit.

- **Loc** – the location of the Patient for this Visit.

- **Slides** – the number of slides specified for the Case.

- **Reason** – the adequacy reason. Selecting one of the **Adequacy radio buttons** displays entries from the **Phrases Library – Reason Box**. To select a library entry, highlight it and click **Select** or press **ENTER**. Click **Cancel** if you do not wish to select a phrase. You can also enter free text in this field.

- **Code** – the Diagnosis Code as defined in the **Phrases Library** for the selected categorization. To enter a different code, type free text in this field.

Any fields in the **Pap Case Window** that are displayed in *italics* indicate that they are *read-only* and cannot be modified in this window. To modify any of these fields, select *Accession Window* from the *Other Menu*.

Pap Case Window List Boxes

- **Physicians** – displays the code and name of any additional Physicians added to the Case. Refer to *Chapter 3 – Accessioning* for more information on adding or deleting Physicians.

- **SNOMEDs** – any SNOMED codes associated with the Diagnosis on the Case. SNOMED codes are associated with Pap Diagnoses in the **Phrases Library**. In the **Coded Phrase Window** for each Pap Diagnosis, enter the desired SNOMED code(s) in one of the three available **SNOMED Code fields**. The specified SNOMED codes will be automatically entered on the Case when this Diagnosis is selected.

- **ICDs** – any ICD codes associated with the Diagnosis on the Case. ICD codes are associated with Pap Diagnoses in the **Phrases Library**. In the **Coded Phrase Window** for each Pap Diagnosis, enter the desired ICD code(s) in one of the six available **ICD Code fields**. The specified ICD codes will be automatically entered on the Case when this Diagnosis is selected.

Pap Case Window Action Buttons

- **Diag** – Not used.

- **Organ** – opens the **Phrases Library – Organisms Box**. Phrases selected from this list are appended to the Diagnosis. To select a library entry, highlight it and click **Select**.

- **Recom** – opens the **Phrases Library – Recommendations Box**. Phrases selected from this list are appended to the Diagnosis. To select a library entry, highlight it and click **Select**.

- **Sign Out/Flag Out** – opens the **Pathologist Signature Window** to sign out or flag out the Case. **Sign Out** is only available if the Case is at the status *Needs Signature,* the Categorization is a normal result and the current User is associated with a *Cyto Signer*. If the Categorization is an abnormal result, Sign Out is only available if the current User is associated with a *Signer*. **Flag Out** is available if the selected categorization is abnormal and the current User is associated with a *Cyto Signer*. After flagging out, the

Case status advances to *Needs Review* and the Case must be signed out by a Pathologist. (Refer to *Chapter 10 – Human Resources* for more information on User privileges.) This button may also display the reason why the Case is ineligible for sign out: No Adequacy, Signed, Cyto Tech (if the Categorization is abnormal), Same Tech (if the Case is at Needs Rescreen) or Max Slides (if the current User has reached the maximum slide limit for his/her User account).

- **History** – opens the **History Window** for the current Patient. The **History Window** lists the first line of all Diagnoses from other cases that have previously been entered for that Patient. The **History Window** is described in *Chapter 10 – Human Resources*.

- **Proc.*** – Opens the **Procedure List Window** for the current case.

- **Preview** – Opens the **Print Preview Window** for the current case.

- **Previous** – opens the previous Pap Case in the current **Case List**.

- **Next** – opens the next Pap Case in the current **Case List**.

- **Done** – closes the **Pap Case Window.**

Organisms and Recommendations Buttons

- Organism and Recommendation comments may be added to the Diagnosis. Click **Organ** to open the **Phrases Library – Organisms Box**. Phrases selected from this list are appended to the Diagnosis. To select a library entry, highlight it and click **Select**.

- Click **Recom** to open the **Phrases Library – Recommendations Box**. Phrases selected from this list are appended to the Diagnosis. To select a library entry, highlight it and click **Select**.

Pap Case Window Check Boxes

- **Comment** – opens the **Quick Case Window** for the current Case so that a Case comment or Specimen comment can be added or viewed.

- **Consults** – opens the **Consult List Window** described in *Chapter 4*.

- **Clinical Info -** opens the **Quick Case Window** for the current Case so that Case clinical information or Specimen clinical information can be added or viewed.

- **Note** – opens the **Quick Case Window** for the current Case so that a final note can be added or viewed.

- **Add**-**Ons** – opens the **Quick Case Window** for the current Case so that Add-Ons can be added or viewed.

- **Images** – opens the **Image List Window**, listing any images that have been added to the Case. Images are described in *Chapter 4*.

Pap Case Window Categorization Check Boxes

The Categorization is the Interpretation category of the Pap smear. Clicking on a **Categorization box** opens a list of any phrases stored in the **Phrases Library** for that Pap category. To select a library entry, highlight it and click **Select** or press **ENTER**.

During your initial system setup and build, you can select up to six different User-defined Categorizations. The names of each of the six Pap categorizations are defined in Reserved Preferences. Please notify your trainer of your selections.

The first category listed, usually defined as Negative, **always** indicates a normal result. Optionally, the second category can be defined as a normal result. Normal results can be signed out by a Cytotechnologist (User associated with a *Cyto Signer*). Abnormal results must be signed out by a Pathologist (User associated with a *Signer*).

The following are example Categorizations as they might appear on the **Pap Case Window**:

- Negative for Intraepithelial Lesion and Malignancy
- Epithelial Cell Abnormality
- Positive for Malignancy
- Other
- Negative Non-Gyn
- Abnormal Non-Gyn

Selecting a Normal Categorization advances the Case to the status *Needs Signature*. **Sign Out** is enabled and the current User can sign out the Case.

Selecting an Abnormal Categorization advances the Case to the status *Needs Signature*. If the current User is associated with a *Signer*, **Sign Out** is enabled and the current User can sign out the Case. If the current User is associated with a *Cyto Signer*, **Flag Out** is enabled and the current User can flag out the Case. The Case needs then advance to *Needs Review*. The Case must be reviewed and signed out by a Pathologist.

Multiple Categorizations may be selected depending upon your laboratory's preference. (Reserved preference: *Make Pap categories mutually exclusive*. Refer to *Chapter 15 – Preferences* for more information on selecting preferences). Regardless of this preference setting, selecting Negative **always** excludes the selection of another Categorization.

Pap Case Window Radio Buttons

Three **radio buttons** are available to enter the Specimen **Adequacy**. Only one Adequacy can be selected per Case. The selections are:

- Unspecified
- Satisfactory
- Unsatisfactory

By default, the Unspecified Adequacy is selected for all Pap Cases at **Needs Diagnosis**. Selection of either Satisfactory or Unsatisfactory is required, as is the entry of an Adequacy Reason. The Case cannot be signed out until an Adequacy is selected by the User.

Selecting an Adequacy displays entries from the **Phrases Library-Reason Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

Selecting **Unsatisfactory** disables the entry of a Categorization as well as the **Interpretation Text Box**. If you have the preference to disable entry of diagnosis on unsatisfactory paps set to **False**, you will be able to enter an interpretation in the **Interpretation Text Box**. You can type free text in this box or press **CTRL+L** to display entries from the **Phrases Library – Pap Diagnosis Box**. To select a library

entry, highlight it and click **Done** or press **ENTER**. This interpretation does not print on reports, if the site wide preference **Do not print Diagnosis section on Inadequate Pap Specimens** is set to **True**. Refer to *Chapter 15 – Preferences* for information on selecting preferences.

Unsatisfactory Specimens must be signed out by a Pathologist (User associated with a *Signer*). If the site wide preference **Allow Cytotechs to sign out unsatisfactory Cases** is set to **True**, Users associated with a *Cyto Signer* may also sign out these Cases.

Pap Case Window Menus

Case Menu

- *Sign Out* – **ALT+X** – opens the **Pathologist Signature Window** to sign out the Case.

- *Unsign Out* **ALT+SHIFT+X** – reverts the Case *Needs* to *Needs Signature*. *This menu item is only available if the Case is at Needs Final Report.*

- *Add Archive Case* – opens the **Accession Window** for the current Patient with the *Case Menu's* **Enter Archive Cases** menu item checked. Refer to the section entitled **Entering Archive Cases** in *Chapter 3 – Accessioning*.

- *Correct Case Number* – opens the **Case Number Entry Box** allowing modification of the current Case's number, in the event an error has been made.

- *Corrected Case* (**Completed Cases Only**) – opens the **Correction Reason Window**. You can type free text in this box or press **CTRL+L** to display entries from the **Paragraphs Library**. To select a library entry, highlight it and click **Done** or press **ENTER**. After entering the Correction Reason, click **Done** or press **ENTER**. A duplicate of the current Case is created at the status *Needs Correction*. The corrected Case has the same Case number as the original Case, followed by .1. Additional corrected Cases on the same Case will be followed by .2, .3, etc. You can now make the necessary modifications to the Case and sign it out.

- *Correction Reason* – displays the Correction Reason on corrected Pap Cases.

- *Print Preview* – opens the **Print Preview Window**. Use the **Full Page button** in the bottom, left corner to view the entire page. Click **Done** to exit the **Print Preview Window**.

- *Print Report* – **ALT+P** – opens the standard print window to print a single report for the current Case. You have the option of printing multiple copies of the Case report. Multiple copies include one original copy and one for each Physician associated with the Case. Billing, File and Medical Records copies may be printed if the site wide preferences to do so are set to **True**.

- *Fax/eMail Report*… – opens the **Fax Selection Window** where you can specify the Physicians to receive a facsimile of the single Case report. The **Fax Selection Window** is described in *Chapter 6*.

- *Open PDF* – opens and displays a PDF copy of the original report.

- *Flag Approved* – A case at Needs Approval has to be flagged as Approved before it can go to Needs Signature. To **Approve** a case, from the Quick Case Window, select the Modify menu and click Flag Approved. The

Reserved Preference **Require flagging cases approved prior to signing** must be set to **True**.

- *Specify Copies* – **ALT+M** – opens the **Extra Copies Window** where you can specify the **Number of Extra Copies** you would like to print for the current Case report. Type a number or use the **arrow buttons**. Click **OK** to accept the number entered. When the Case report is printed, each extra copy specified will be printed, labeled **Extra Copy**.

- *Technical Charge Location* – **ALT+T** – opens the Locations List Box Window allowing the user to select and assign a pre-defined Technical Charge Location for the case.

- *Show Diagnoses* – displays Final, Original, Rescreen and Review diagnoses and initials of the Cytotechnologists and Pathologists screening the Case.

- *View Charges* – **CTRL+=** – opens the **Charge Selection Window** to create, view or modify charges on the current Case. The **Charge Selection Window** is described in *Chapter 6.*

- *Evaluate a Reflex Rule* – opens the **Reflex Rule Code List Box**, allowing the user to select and then evaluate a pre-define Reflex Rule from the Reflex Tests Library.

- *Show Ad Hoc Reflex Tests* – If an Ad Hoc Reflex is ordered on the case at accession, there will be a check mark displaying next to the **Show Ad Hoc Reflex Tests** Menu Item in the Pap Window's Case Menu. This indicates that an Ad Hoc Rule exists for this case. If you click that menu item WindoPath will evaluate if the current diagnosis will order the reflex test. If an Ad Hoc Reflex rule is added to a case which states that if the category is Positive, order an HPV and the pending diagnosis is ASCUS, clicking that item will say **Order will not be placed based on current diagnosis**. If the pending Diagnosis is Positive, the pop-up will say **Order will be placed based on current diagnosis**.

- *Show Positive Reflex Rules* – If the pending diagnosis would invoke a Reflex Rule upon sign out, the window that opens will display all positive rules.

- *Auto Fax/eMail* – toggle switch to automatically fax or e-mail each report after each Case is signed out.

- *Auto History* – automatically displays the **History Window** for each Patient as the Case is displayed in the **Pap Case Window**. The **History Window** is described in *Chapter 10 – Human Resources*.

- *Auto Print* – toggle switch to automatically print each report after each Case is signed out.

- *Organisms* – **ALT+SHIFT+O** – Organism comments may be added to the Diagnosis. Opens the **Phrases Library – Organisms Box**. Phrases selected from this list are appended to the Diagnosis. To select a library entry, highlight it and click **Select**.

- *Recommendation* – **ALT+SHIFT+O** – Recommendation comments may be added to the Diagnosis. Opens the **Phrases Library – Recommendations Box**. Phrases selected from this list are appended to the Diagnosis. To select a library entry, highlight it and click **Select**.

Adequacy Menu

- *1* – **ALT+1** – selects the first **Adequacy radio button**.

- *2* – **ALT+2** – selects the second **Adequacy radio button**.

- *3* – **ALT+3** – selects the third **Adequacy radio button**.

Category Menu

- *1* – **CTRL+1** – selects the first Categorization check box and opens the corresponding Box Name from the **Phrases Library** listing all potential Diagnoses for this category.

- *2* – **CTRL+2** – selects the second Categorization check box and opens the corresponding Box Name from the **Phrases Library** listing all potential Diagnoses for this category.

- *3* – **CTRL+3** – selects the third Categorization check box and opens the corresponding Box Name from the **Phrases Library** listing all potential Diagnoses for this category.

- *4* – **CTRL+4** – selects the fourth Categorization check box and opens the corresponding Box Name from the **Phrases Library** listing all potential Diagnoses for this category.

- *5* – **CTRL+5** – selects the fifth Categorization check box and opens the corresponding Box Name from the **Phrases Library** listing all potential Diagnoses for this category.

- *6* – **CTRL+6** – selects the sixth Categorization check box and opens the corresponding Box Name from the **Phrases Library** listing all potential Diagnoses for this category.

Other Menu

- *Accession Window* – opens the **Accession Window** for the current Case.

- *Case Documents* - opens the **Case Documents List Window** displaying a list of documents attached to the Case.

- *Capture Images* – **ALT+C** – attaches all images from the Captured Specimen Images folder to the current Case.

- *Change User Pathologist* – **CTRL+ALT+SHIFT+P** – opens the **Pathologist Signature Window**. This menu item is only enabled when using the **Change Pathologist User Privilege**. To select a different signer, highlight the appropriate name in the list. Enter the electronic signature password of the Pathologist signing out the case and click **Done**.

- *Diagnosis Code* – opens a pop-up box to add or modify the Diagnosis code.

- *Fax on Sign Out* – toggle switch to automatically fax or e-mail the Case after it is signed out.

- *Flag for Rescreen* – **F6** – advances the Case *Needs* to *Needs Rescreen*. This menu item is only enabled on Normal Pap Cases that have been signed out by a Cytotechnologist. Cases flagged for Rescreen must be signed out by a different Cytotechnologist or by a Pathologist.

- *Flag for Review* - **F7** – advances the Case *Needs* to *Needs Review*. This menu item is enabled on all Pap Cases. Cases flagged for Review must be signed out by a Pathologist.

- *Flag Special* – opens the **Special Flag List Window** allowing the User to select and modify a special flag.

- *Images* – opens the **Image List Window**, listing any images that have been added to the Case. Images are described in *Chapter 4.*

- *Print History* - prints the Case numbers and Diagnoses of all Cases for the current Patient.

- *Procedures* – opens the **Procedure List Window**, displaying all procedures for the current Case. Procedures are described in *Chapter 4.*

- *Set on Hold* – opens a pop-up box to specify a date and time until which to hold the Case's Final Report.

- *Set Sign Out Location* – opens a drop down menu displaying entries from the **Phrases Library – Sign Out Location Box**. To select a sign out location, select an entry from the list and click **Done**. Click **Cancel** to cancel the operation.

- *Show History* – opens the **History Window** for the current Patient. The **History Window** lists the first line of all the Diagnoses that have been entered on the Patient. The **History Window** is described in *Chapter 10 – Human Resources*.

- *Show Rescreen Percent* – displays the user-defined rescreen percentage.

- *Switch to Quick View* – **ALT+Q** -opens the **Quick Case Window** for the current Case.

- *Go to Gross – ALT+G* – opens the **Quick Case Window, Gross Tab.**

- *Load Case* – **CTRL+K** – opens the **Case Number Entry Box** where the number of the next Case to be opened can be entered. You can use the **arrow buttons** to enter the Case letter prefix, year and accession number or type free text. Enter the complete Case number you wish to search for and click **Done**. Since you are in the **Pap Case Window**, you will only be able to open Pap cases. Click **Cancel** to quit the search. If a Case with that number is found, the **Pap Case Window** will remain open but will now display the contents of the requested Case. If no Case number matching the number entered is found, the message **No such Case** is displayed. Click **OK** to close the box and return to the **Pap Case Window**.

- *Log to Audit Trail* – opens the **Log Audit Window** to record the duration of a Cytotechnologist's Pap Case processing for CLIA and CAP reports. Management reports can be run to collect this information.

Display Menu

The Display Menu is described in *Chapter 2 – Patients & Visits.*

Pap Diagnosis/Interpretation Text Box

The **Diagnosis/Interpretation Text Box** displays the interpretation or Diagnosis, for the Case. This box displays text selected from the **Phrases Library** when entering the Categorization. Free text can also be typed in this box. To enter free text, place the cursor in the desired position within the **Interpretation Text Box** and begin typing. To start a new line of text, press **ENTER**.

Pap Comment Text Box

The **Comment Text Box** displays any comments entered for the Case. This box corresponds to the **C Com** (Case Comment) tab in the **Quick Case Window**. You can free text in this box or add text selected from the **Phrases Library, Comment Box.** .

Signing Out a Normal Pap Case

Once an Adequacy, a Categorization and an interpretation have been entered, the Case can be signed out. If a category indicating a Normal result was selected, the Case can be signed out by a Cytotechnologist (User associated with a *Cyto Signer*). Click **Sign Out** or press **ALT+X.** You will be prompted to enter an electronic signature password. Enter the password, then click **Done** or press **ENTER** to sign out the Case. Click **Cancel** to cancel the operation.

If the site wide preference to review charges at sign out is set to **True**, the **Charge Selection Window** will open. (Refer to *Chapter 6* for information on charges.) Modify charges as needed, then click **Done** or press **ENTER**.

After the Case has been signed out, it is now at the status of *Needs Final Report*. Refer to *Chapter 7* for instructions on printing reports.

Signing Out an Abnormal Pap Case

Once an Adequacy, a Categorization and an interpretation have been entered, the Case can be signed out. If a category indicating an Abnormal result was selected, the Case must be signed out by a Pathologist (User associated with a *Signer*).

If the current User is associated with a Cyto Signer:

Click **Flag Out** or press **ALT+X**. You will be prompted to enter an electronic signature password. Enter the password, then click **Done** or press **ENTER** to flag out the Case. Click **No** to cancel the operation. If the preference to review charges at sign out has been selected, the **Charge Selection Window** will open. (Refer to Chapter 6 for information on charges.) Modify charges as needed, then click **Done** or press **ENTER**. Case needs will advance to *Needs Review*. The Case can now be signed out by a Pathologist as described below.

If the current User is associated with a Signer:

Click **Sign Out** or press **ALT+X**. You will be prompted to enter an electronic signature password. Enter the password, then click **Done** or press **ENTER** to sign out the Case. Click **No** to cancel the operation. If the preference to review charges at sign out has been selected, the **Charge Selection Window** will open. (Refer to *Chapter 6* for information on charges.) Modify charges as needed, then click **Done** or press **ENTER**.

After the Case has been signed out, it is now at the status *Needs Final Report*. Refer to *Chapter 7* for instructions on printing reports.

Batch Sign Out of Abnormal Pap Cases

The Pathologist might wish to sign out all Abnormal Pap Cases at once.

1. Click **Current Cases** to open the **Case List Window**.

2. Filter the *Type Menu* to *Pap* and *Needs Menu* to *Review.*

3. Open the bottom (or first) Case in the **Case List** by double clicking on it or click **Open**.

4. Click **Sign Out** or press **ALT+X.**

5. Enter your electronic signature password.

6. Click **Done** or press **ENTER**.

7. If the preference to review charges at sign out is selected, the **Charge Selection Window** will open. (Refer to *Chapter 6* for information on charges.) Modify charges as needed, then click **Done** or press **ENTER**.

8. Click **Next** to open the next Case in the **Case List**.

9. Repeat from Step 4 until all Cases have been signed out.

After the Case has been signed out, it is now at the status *Needs Final Report*. Refer to *Chapter 7* for instructions on printing reports.

Pap Rescreens

In order for the Rescreen process to work properly, each Cytotechnologist must have a unique Pathologist assigned to his/her User account. This is best accomplished by creating a Pathologist entry in **Human Resources** for each Cytotechnologist. This Pathologist entry is then associated with the corresponding Cytotechnologist in the **User Library**.

Automatic Flagging for Rescreen

Incorporated in **WindoPath** is an automatic flagging of normal Pap Cases for rescreening. A User-defined percentage of Pap Cases that are signed out by a Cytotechnologist (User associated with a *Cyto Signer*) are flagged for rescreen by another Cytotechnologist. A rescreen percentage may be set for each Pap Case type in the **Case Type Library**. (For CLIA compliance, this percentage must be set to at least 10%.) A rescreen percentage can also be specified per Pathologist in **Human Resources**. The Pathologist's rescreen percentage overrides the Case type rescreen percentage.

If the site wide preference **Flag Pap Cases for rescreen if there was a previous abnormal** is set to **True**, when a Pap Case is signed out and the Patient has one or more abnormal Pap Cases in the database, the Case is automatically flagged for rescreen.
Once a Case has been flagged as *Needs Rescreen*, it cannot be rescreened by the original Cytotechnologist. A second Cytotechnologist must rescreen the Case and report his/her results. If the second interpretation **matches** the first, the Case can be signed out by the second Cytotechnologist. If the second interpretation **does not match** the first, the Case is flagged as *Needs Review* and must be reviewed and signed out by a Pathologist (User associated with a *Signer*).

Manual Flagging for Rescreen

Pap Cases can be flagged for rescreen by selecting *Flag for Rescreen (F6)* from the *Other Menu* on the **Pap Case Window**. This menu item is only enabled on Normal Pap Cases that have been signed out by a Cytotechnologist.

Abnormal Rescreens

If the site wide preference **Rescreen abnormal Paps** is set to **True**, Abnormal Pap Cases Flagged out by a cytotech (User associated with a *Cyto Signer*) are flagged for *Needs Ab Rescreen* instead of *Needs Review*. These cases may be rescreened by a second cytotech. If the second cytotech changes the categorization to a Normal category, the Case is Signed out by the second cytotech. The Case *Needs* advance to *Needs Final Report*. If the second cytotech agrees with the first cytotech's Abnormal categorization, the Case is Flagged out by the second cytotech. The Case Needs advance to *Needs Review*. The Case must be reviewed and signed out by a Pathologist (User associated with a *Signer*.) The Case *Needs* advance to *Needs Final Report*.

Batch Rescreening

Click **Current Cases** to open the **Case List Window**.

Filter the *Type Menu* to *Pap* and *Needs Menu* to *Rescreen.*

Open the bottom (or first) Case in the **Case List** by double-clicking on it or click **Open**.

If you **agree** with the original interpretation:

1. Click **Sign Out** or press **ALT+X**.
2. Enter your electronic signature password.
3. Click **Done** or press **ENTER**.
4. If the preference to review charges at sign out has been selected, the **Charge Selection Window** will open. (Refer to *Chapter 6* for information on charges.) Modify charges as needed then click **Done** or press **ENTER**.
5. Click **Next** to open the next Case in the **Case List**.
6. Repeat from Step 1 until all Cases have been rescreened.

If you **disagree** with the original interpretation:

1. Click the desired Categorization to open the **Phrases Library** for that Pap category.
2. To select a library entry, highlight it and click **Select** or press **ENTER**. To enter free text, place the cursor in the desired position within the **Interpretation Text Box** and begin typing. To start a new line of text, press **ENTER**.
3. Click **Flag Out** or press **ALT+X**.
4. Enter your electronic signature password.
5. Click **Done** or press **ENTER**.
6. Click **Next** to open the next Case in the **Case List**.
7. Repeat from Step 1 until all Cases have been rescreened.

Pap Reviews

Cases flagged for Review must be Signed out by a Pathologist (User associated with a *Signer*).

Automatic Flagging for Review

Pap Cases are automatically flagged for Review when:

1. The Case is at *Needs Signature*: The selected categorization is Abnormal and the current User is associated with a *Cyto Signer*. The Case is Flagged out by the cytotech.

2. The Case is at *Needs Signature*: The site wide preference **Allow cytotechs to sign out unsatisfactory Cases** is set to **False**. The selected Adequacy is Unsatisfactory and the current User is associated with a *Cyto Signer*. The Case is Flagged out by the cytotech.

3. The Case is at *Needs Signature*: The site wide preference **Flag Pap Cases for review if there was a previous abnormal** is set to **True**. The current Patient has one or more previous abnormal Pap Cases in the database. The Case is Flagged out by the cytotech.

4. The Case is at *Needs Rescreen*: The site wide preference **Flag for review only if category changes** is set to **True**. The second cytotech disagrees with the first cytotech's interpretation. The selected categorization is Abnormal and the current User is associated with a *Cyto Signer*. The Case is Flagged out by the second cytotech.

5. The Case is at *Needs Rescreen*: The site wide preference **Flag for review only if category changes** is set to **False**. The second cytotech modifies any information on the Case. The Case is Flagged out by the second cytotech.

6. The Case is at *Needs Ab Rescreen*: The second cytotech agrees with the first cytotech's Abnormal categorization. The Case is Flagged out by the second cytotech.

Manual Flagging for Review

Normal Pap Cases that have been signed out by a cytotech can be flagged for Review by selecting *Flag for Review (F7)* from the *Other Menu* of the **Pap Case Window**. A confirmation dialog will display **Really flag for Review**. Cases flagged for Review must be signed out by a Pathologist.

Unflagging for Review

Pap Cases that have been flagged for Review, either manually or automatically, can be unflagged for Review. Selecting the **Unsign Out** item from the *Case Menu* reverts the Case *Needs* to *Needs Signature*.

Severity Codes

The Severity Code for each Pap Case is used for generating discrepancy reports to show the level of discrepancy between screeners. Severities are generally coded on a scale of 0-6, where code Severity0 indicates an Unsatisfactory adequacy, a code of

Severity1 indicates a normal result and a code of Severity6 indicates a severely abnormal result.

Severity Codes are created in the **Phrases Library**, box name **Severity**. They are added to the **Severity Field** of each pap diagnosis in the **Phrases Library** using **CTRL+L**.

Pap Preferences

The following User, Site Wide and Reserved preferences are specific to Pap Cases. Refer to *Chapter 15 – Preferences* for a detailed description of each preference.

User
Default Pap Case to Within Normal Limits
Default Pap Cases to satisfactory
Load only Pap Cases

Site Wide
Add Pap diagnoses on same line
Allow cyto techs to sign out unsatisfactory Cases
Combine Adequacy Reason section with Adequacy section
Do automatic case charges when signing out Paps
Do not print Diagnosis Section on Inadequate Pap Specimens
Flag for review only if category changes
Flag Pap cases for rescreen if there was a previous abnormal
Flag Pap cases for review if there was a previous abnormal
In pap case window add headings when buttons pushed
On Pap history, print only paps and correlated cases
Prompt for rescreens
Rescreen abnormal Paps
Suppress extra copies for pap cases
Suppress reviewer's signature on reports
Suppress source from diagnosis section of pap cases

Site Wide Menu
Default pap slide count

Reserved
Allow batch sign out of normal Paps
Allow only one signature on Pap reports
Automatically delete charges in unsatisfactory paps
Bold diagnoses for pap categories 3 thru 6
Disallow entry of diagnosis on unsatisfactory Paps
Do not prompt for pieces on pap or cyto cases
Fax malignant paps on sign out
Flag for review instead of rescreen
Flag unsatisfactory paps for rescreen
Make Pap categories mutually exclusive
New Bethesda Rules
On an unsatisfactory pap case, delete HPV procedures
Require adequacy entry for Pap cases
Store multiple diagnosis codes

V8 Do not require adequacy reason on pap cases
V8 Only examine latest pap result when checking abnormals for review

Reserved Menu
Pap Categories

Reflex Rules

Many pathology laboratories frequently order follow-up testing for patient cases when certain results are observed. This is known as reflex testing. Reflex tests are used to clarify or elaborate on primary test results. WindoPath can automatically initiate the ordering of a reflex test for a case. This is known as a reflex rule. User Privilege 118, **Modify Reflex Rules**, must be set to **True** for the user to access the Reflex Tests Library.

Refer to the section entitled **Reflex Tests Library** in *Chapter 11 – The Library* for more information on how to create, define and trigger Reflex Rules for Pap Cases.

Integrated Molecular Tests & Molecular Cases

Many Pathology Laboratories frequently order Molecular Tests on their Pap Cases. Ex: HPV, GC, CT, etc. Many Laboratories also frequently process **Molecular Only** cases using the **Histology Case Type**.

Please contact your Application Specialist or WindoPath Support for assistance when implementing this functionality. Because the workflow of each lab is unique, individualized assistance will be provided to your lab detailing specifics including Set-up, Ordering options, Resulting options, Report Distribution options and Formatter Display options.

Chapter 9 – Prostate Cases

Prostate Cases are processed differently than other Case types and so they are described separately in this chapter.

All Cases, including Prostate Cases, are accessioned in the **Accession Window** as described in *Chapter 3 – Accessioning*. However, Prostate results are entered in the **Prostate Case Window**, shown in Figure 2, as opposed to the **Quick Case Window** where other Case types are resulted.

When the Prostate Module is enabled, prostate specimens processed in WindoPath are reported with corresponding, color coded histograms plotted on either 1 out of 8 of WindoPath's Prostate Diagrams or they can be plotted on a custom prostate diagram created and provided by the user.

WindoPath will automatically create several, diagram-specific prostate sources for each corresponding prostate diagram in the Sources Library. WindoPath requires the use of these standardized sources for accurate histogram plotting on the prostate diagram.

The Prostate Module enables the user to create up to 3 Prostate Case Types using up to 3 Prostate Case Classes: **Prostate1Case**, **Prostate2Case**, **Prostate3Case**, etc. However, if you do not wish to create a separate case type for prostate cases, you may process prostate cases using the Surgical Case Type and still utilize all of the Prostate Module's functionality.

Set Up for Prostate Cases

Enable Prostate Module and Prostate Sources

To enable the Prostate Module in WindoPath to process prostate cases, Reserved Preference O515, **Enable Prostate Cases**, must be set to **True**. Please ask your Application Specialist or WindoPath Support for assistance setting this reserved preference to **True**.

When Reserved Preference O515, **Enable prostate cases**, is set to **True**, the User is prompted to create sources for prostate Cases. Responding **Yes** to the prompt automatically creates source definitions in the correct **PROS** format.

The diagram and sector specific prostate sources are coded with a very specific nomenclature that may NOT be modified by the user. Aside from this one exception, you may modify all other elements for these prostate source definitions. (Ex: You may modify the Description, you may add default Profiles and Charges, etc.)

Using Prostate Case Types

The Prostate Module enables the user to create up to 3 Prostate Case Types using up to 3 Prostate Case Classes: **Prostate1Case**, **Prostate2Case**, **Prostate3Case**, etc.

To create a Prostate Case Type using a Prostate Case Class, please refer to *Chapter 11 – The Library.*

Using the Surgical Case Type for Prostate Cases

If you do not wish to create a separate case type for prostate cases, you may process prostate cases using the Surgical Case Type and still utilize all of the Prostate Module's functionality. However, WindoPath still requires you to use the WindoPath-created standardized Prostate Sources. For more information on how to accession Prostate Cases using the Prostate Case Type, please refer to the section entitled **Accessioning Prostate Cases** later on in this chapter.

In addition, a Prostate-specific Report Definition with the selected case type of **Surgical** will need to be created in the Formatter. For more information on how to set this Report Definition up, please refer to the section later in this chapter entitled **Report Formatter – Surgical Case Type for Prostate Cases**.

Physician Defaults for Prostate Cases

In **Human Resources – Physicians**, open the **Physician Window** for each Physician who will be submitting Prostate Cases. In the Prostate Sectors section, click the **radio button** corresponding with the number of prostate sectors the Physician will be using – 6, 12, 18 or 24. When creating a new Physician, a default of 6 sectors is selected. When accessioning a Prostate Case, the number of sectors associated with the Case Submitter will be displayed in the **Prostate Selection Dialog**.

Prostate Diagrams & Prostate Diagram Directory

WindoPath Prostate Diagrams

All of the Prostate Diagram image files use the .jpg file format. Each image file displays the same Posterior View image of the organ with different margins super-imposed to define specific sector counts. All image files include a Histogram Legend displaying the default histogram colors.

Figure 1 – **Prostate 01 Sector Diagram**
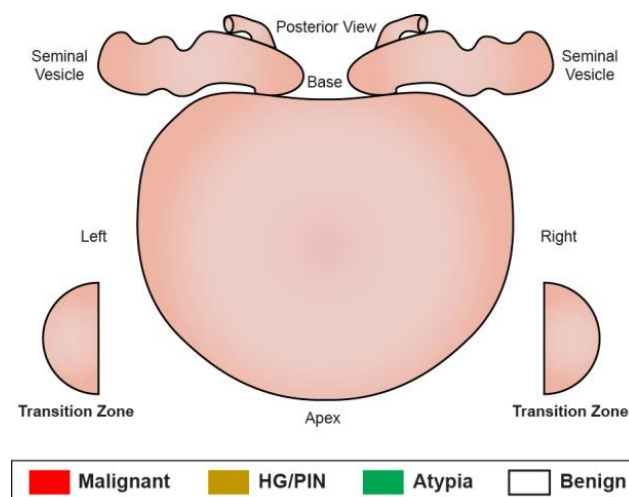
01 Sector Diagram & Corresponding Sources

- The 01 Sector Diagram displays the image of the organ with no margins super-imposed. This Sector Diagram is designed to be used with prostate cases which only have 1 specimen, Specimen A (Figure 1).

- Histograms representing each core or piece included on Specimens with the source **PROS1 – 01 ALL** defined will display in the center of the image.

- Histograms representing each core or piece included on Specimens with any of the four **SEMINAL VESICLE** or **TRANSITION ZONE** sources defined will display in the appropriate corresponding area of the image file.

- Corresponding Default Sources Available:

  - **PROS1 – 01 ALL**
  - **PROS1 – 02 LEFT SEMINAL VESICLE**
  - **PROS1 – 03 RIGHT SEMINAL VESICLE**
  - **PROS1 – 04 LEFT TRANSITION ZONE**
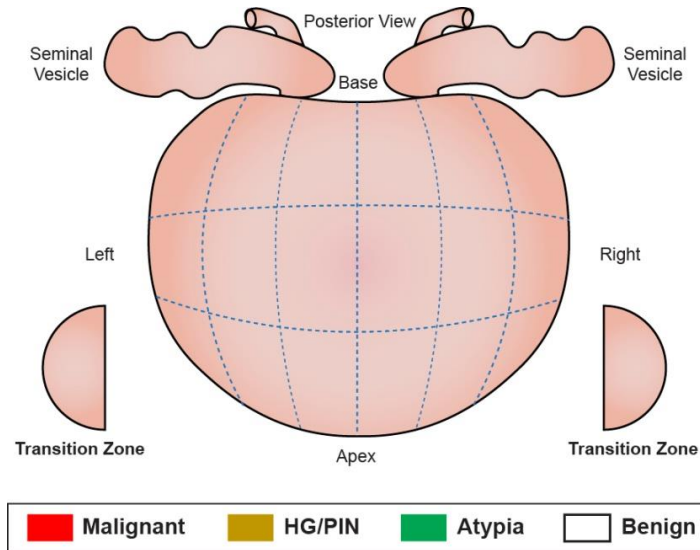 - **PROS1 – 05 RIGHT TRANSITION ZONE**
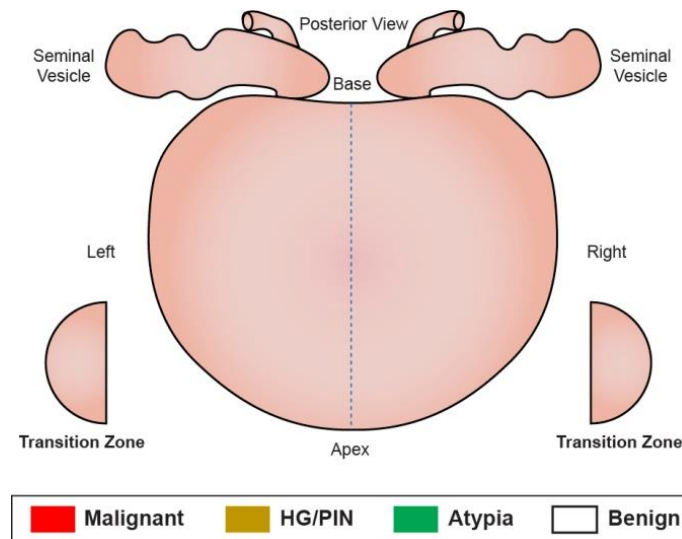
Figure 2 – **Prostate 02 Sector Diagram**

02 Sector Diagram & Corresponding Sources

- The 02 Sector Diagram displays the image of the organ with one margin super-imposed down the center of the organ, creating a Left Hemisphere and a Right Hemisphere. This Sector Diagram is designed to be used with prostate cases which have 2 specimens labeled Left and Right (Figure 2).

- Histograms representing each core or piece included on Specimens with either of the first 2 sources listed below defined will display in the center of each LEFT or RIGHT HEMISPHERE.

- Histograms representing each core or piece included on Specimens with any of the four **SEMINAL VESICLE** or **TRANSITION ZONE** sources defined will display in the appropriate corresponding area of the image file.

- Corresponding Default Sources Available:

  - **PROS2 – 01 LEFT**

- **PROS2 – 02 RIGHT**
- **PROS2 – 03 LEFT SEMINAL VESICLE**
- **PROS2 – 04 RIGHT SEMINAL VESICLE**
- **PROS2 – 05 LEFT TRANSITION ZONE**
- **PROS2 – 06 RIGHT TRANSITION ZONE**
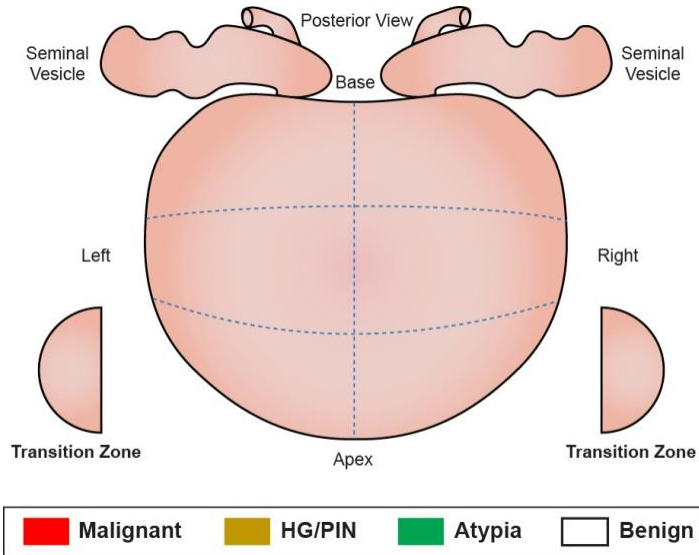
Figure 3 – **Prostate 06 Sector Diagram**

06 Sector Diagram & Corresponding Sources

- The 06 Sector Diagram displays the image of the organ with multiple margins super-imposed on it creating 6 sectors. This Sector Diagram is the WindoPath Default (Figure 3).

- Histograms representing each core or piece included on Specimens with any of the first 6 sources listed below defined display in the appropriate corresponding area of the image file.

- Histograms representing each core or piece included on Specimens with any of the four **SEMINAL VESICLE** or **TRANSITION ZONE** sources defined will display in the appropriate corresponding area of the image file.

- Corresponding Default Sources Available:

  - **PROS6 – 01 LEFT BASE**
  - **PROS6 – 02 LEFT MID**
  - **PROS6 – 03 LEFT APEX**
  - **PROS6 – 04 RIGHT BASE**
  - **PROS6 – 05 RIGHT MID**
  - **PROS6 – 06 RIGHT APEX**
  - **PROS6 – 07 LEFT SEMINAL VESICLE**
  - **PROS6 – 08 RIGHT SEMINAL VESICLE**
  - **PROS6 – 09 LEFT TRANSITION ZONE**
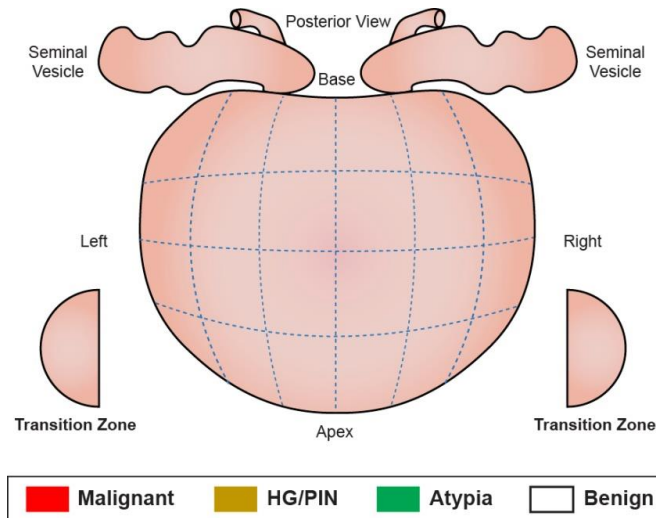 - **PROS6 – 10 RIGHT TRANSITION ZONE**
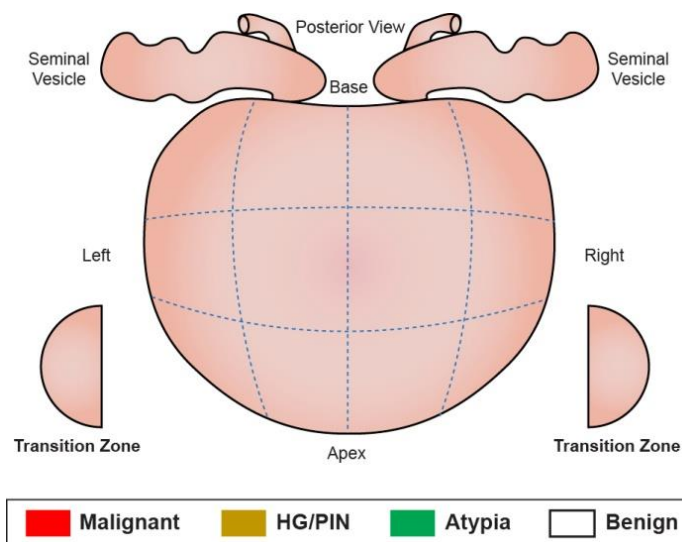
Figure 4 – **Prostate 12 Sector Diagram**

12 Sector Diagram & Corresponding Sources

- The 12 Sector Diagram displays the image of the organ with multiple margins super-imposed on it creating 12 sectors (Figure 4).

- Histograms representing each core or piece included on Specimens with any of the first 12 sources listed below defined display in the appropriate corresponding area of the image file.

- Histograms representing each core or piece included on Specimens with any of the four **SEMINAL VESICLE** or **TRANSITION ZONE** sources defined will display in the appropriate corresponding area of the image file.

- Corresponding Default Sources Available:

    - **PROS12 – 01 LEFT BASE LATERAL**

    - **PROS12 – 02 LEFT MID LATERAL**

    - **PROS12 – 03 LEFT APEX LATERAL**

    - **PROS12 – 04 LEFT BASE**

    - **PROS12 – 05 LEFT MID**

    - **PROS12 – 06 LEFT APEX**

    - **PROS12 – 07 RIGHT BASE**

    - **PROS12 – 08 RIGHT MID**

    - **PROS12 – 09 RIGHT APEX**

    - **PROS12 – 10 RIGHT BASE LATERAL**

    - **PROS12 – 11 RIGHT MID LATERAL**

    - **PROS12 – 12 RIGHT APEX LATERAL**

    - **PROS12– 13 LEFT SEMINAL VESICLE**

    - **PROS12– 14 RIGHT SEMINAL VESICLE**

    - **PROS12 – 15 LEFT TRANSITION ZONE**

    - **PROS12– 16RIGHT TRANSITION ZONE**
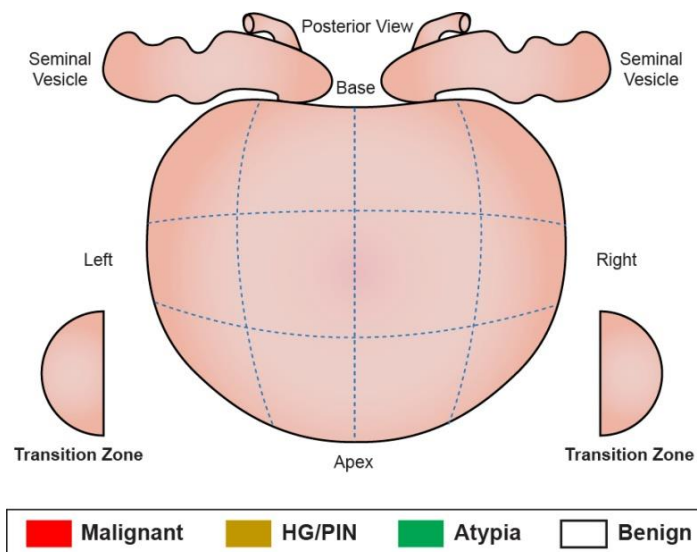
Figure 5 – **Prostate 14 Sector Diagram**

14 Sector Diagram & Corresponding Sources

- The 14 Sector Diagram and corresponding sources are nearly identical to the 12 Sector Diagram and Sources. The MAJOR difference between the 14 Sector Diagram and the 12 Sector Diagram is the addition of 2 additional sources to the standard 12; **TRANSITION ZONE** and **ANTERIOR ZONE** (Figure 5).

- The 14 Sector Diagram displays the image of the organ with multiple margins super-imposed on it creating 12 sectors.

- Histograms representing each core or piece included on Specimens with any of the first 12 sources listed below defined display in the appropriate corresponding area of the image file.

- Histograms representing each core or piece included on Specimens with any of the four **SEMINAL VESICLE** or **TRANSITION ZONE** sources defined will display in the appropriate corresponding area of the image file.

- Histograms representing each core or piece included on Specimens with either the **TRANSITION ZONE** or the **ANTERIOR ZONE** defined DO NOT DISPLAY on the image of the organ at all. Rather, they display in the white space to the left and right margins of diagram image file.

- Corresponding Default Sources Available:

    - **PROS14 – 01 LEFT BASE LATERAL**

    - **PROS14 – 02 LEFT MID LATERAL**

    - **PROS14 – 03 LEFT APEX LATERAL**

    - **PROS14 – 04 LEFT BASE**

    - **PROS14 – 05 LEFT MID**

    - **PROS14 – 06 LEFT APEX**

    - **PROS14 – 07 RIGHT BASE**

    - **PROS14 – 08 RIGHT MID**

    - **PROS14 – 09 RIGHT APEX**

- **PROS14 – 10 RIGHT BASE LATERAL**
- **PROS14 – 11 RIGHT MID LATERAL**
- **PROS14 – 12 RIGHT APEX LATERAL**
- **PROS14 – 13 LEFT SEMINAL VESICLE**
- **PROS14 – 14 RIGHT SEMINAL VESICLE**
- **PROS14 – 15 LEFT TRANSITION ZONE**
- **PROS14 – 16RIGHT TRANSITION ZONE**
- **PROS14 – 17 TRANSITION ZONE**
- **PROS14 – 18 ANTERIOR ZONE**

Figure 6 – **Prostate 18 Sector Diagram**

18 Sector Diagram & Corresponding Sources

- The 18 Sector Diagram displays the image of the organ with multiple margins super-imposed on it creating 18 sectors (Figure 6).

- Histograms representing each core or piece included on Specimens with any of the first 18 sources listed below defined display in the appropriate corresponding area of the image file.

- Histograms representing each core or piece included on Specimens with any of the four **SEMINAL VESICLE** or **TRANSITION ZONE** sources defined will display in the appropriate corresponding area of the image file.

- Corresponding Default Sources Available:
   - **PROS18 – 01 LEFT BASE VERY LATERAL**
   - **PROS18 – 02 LEFT MID VERY LATERAL**
   - **PROS18 – 03 LEFT APEX VERY LATERAL**
   - **PROS18 – 04 LEFT BASE LATERAL**
   - **PROS18 – 05 LEFT MID LATERAL**
   - **PROS18 – 06 LEFT APEX LATERAL**

- **PROS18 – 07 LEFT BASE**

- **PROS18 – 08 LEFT MID**

- **PROS18 – 09 LEFT APEX**

- **PROS18 – 10 RIGHT BASE**

- **PROS18 – 11 RIGHT MID**

- **PROS18 – 12 RIGHT APEX**

- **PROS18 – 13 RIGHT BASE LATERAL**

- **PROS18 – 14 RIGHT MID LATERAL**

- **PROS18 – 15 RIGHT APEX LATERAL**

- **PROS18 – 16 RIGHT BASE VERY LATERAL**

- **PROS18 – 17 RIGHT MID VERY LATERAL**

- **PROS18 – 18 RIGHT APEX VERY LATERAL**

- **PROS18– 19 LEFT SEMINAL VESICLE**

- **PROS18– 20 RIGHT SEMINAL VESICLE**

- **PROS18 – 21 LEFT TRANSITION ZONE**

- **PROS18– 22 RIGHT TRANSITION ZONE**
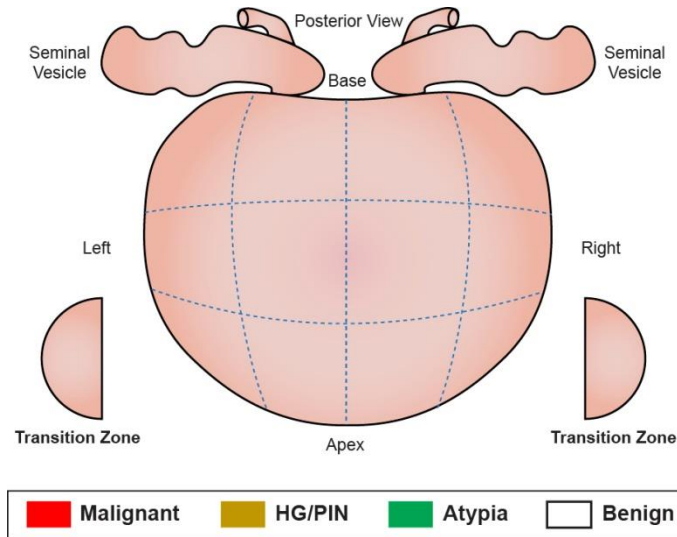
Figure 7 – **Prostate 20 Sector Diagram**

20 Sector Diagram & Corresponding Sources

- This is actually the same as the 12 sector prostate with eight additional custom defined site names. After the user selects the sites, if any of the custom defined names were selected, a new dialog will display to allow them to set the custom site names (Figure 7).

- There is also a menu item in the Prostate Window's *Prostate Menu* labeled **Rename Custom Sites**. This allows the user to change the custom site names, if any exist on that case.

- The custom site names will be displayed on the Prostate Diagram in the white space on the left and right side of the diagram. The corresponding histograms will display immediately above the custom site name.

- Corresponding Default Sources Available:

  - **PROS20 – 01 LEFT BASE LATERAL**
  - **PROS20 – 02 LEFT MID LATERAL**
  - **PROS20 – 03 LEFT APEX LATERAL**
  - **PROS20 – 04 LEFT BASE**
  - **PROS20 – 05 LEFT MID**
  - **PROS20 – 06 LEFT APEX**
  - **PROS20 – 07 RIGHT BASE**
  - **PROS20 – 08 RIGHT MID**
  - **PROS20 – 09 RIGHT APEX**
  - **PROS20 – 10 RIGHT BASE LATERAL**
  - **PROS20 – 11 RIGHT MID LATERAL**
  - **PROS20 – 12 RIGHT APEX LATERAL**
  - **PROS20 – 13 LEFT SEMINAL VESICLE**
  - **PROS20 – 14 RIGHT SEMINAL VESICLE**
  - **PROS20 – 15 LEFT TRANSITION ZONE**
  - **PROS20 – 16 RIGHT TRANSITION ZONE**
  - **PROS20 – 17 USER DEFINED NAME**
  - **PROS20 – 18 USER DEFINED NAME**
  - **PROS20 – 19 USER DEFINED NAME**
  - **PROS20 – 20 USER DEFINED NAME**
  - **PROS20 – 21 USER DEFINED NAME**
  - **PROS20 – 22 USER DEFINED NAME**
  - **PROS20 – 23 USER DEFINED NAME**
  - **PROS20 – 24 USER DEFINED NAME**

Figure 8 – **Prostate 24 Sector Diagram**

24 Sector Diagram & Corresponding Sources

- The 24 Sector Diagram displays the image of the organ with multiple margins super-imposed on it creating 24 sectors (Figure 8).

- Histograms representing each core or piece included on Specimens with any of the first 24 sources listed below defined display in the appropriate corresponding area of the image file.

- Histograms representing each core or piece included on Specimens with any of the four **SEMINAL VESICLE** or **TRANSITION ZONE** sources defined will display in the appropriate corresponding area of the image file.

- Corresponding Default Sources Available:

  - **PROS24 – 01 LEFT BASE VERY LATERAL**
  - **PROS24 – 02 LEFT LOWER MID VERY LATERAL**
  - **PROS24 – 03 LEFT UPPER MID VERY LATERAL**
  - **PROS24 – 04 LEFT APEX VERY LATERAL**
  - **PROS24 – 05 LEFT BASE LATERAL**
  - **PROS24 – 06 LEFT LOWER MID LATERAL**
  - **PROS24 – 07 LEFT UPPER MID LATERAL**
  - **PROS24 – 08 LEFT APEX LATERAL**
  - **PROS24 – 09 LEFT BASE**
  - **PROS24 – 10 LEFT LOWER MID**
  - **PROS24 – 11 LEFT UPPER MID**
  - **PROS24 – 12 LEFT APEX**
  - **PROS24 – 13 RIGHT BASE**
  - **PROS24 – 14 RIGHT LOWER MID**
  - **PROS24– 15 RIGHT UPPER MID**
  - **PROS24 – 16 RIGHT APEX**

- **PROS24 – 17 RIGHT BASE LATERAL**
- **PROS24 – 18 RIGHT LOWER MID LATERAL**
- **PROS24 – 19 RIGHT UPPER MID LATERAL**
- **PROS24 – 20 RIGHT APEX LATERAL**
- **PROS24 – 21 RIGHT BASE VERY LATERAL**
- **PROS24 – 22 RIGHT LOWER MID VERY LATERAL**
- **PROS24 – 23 RIGHT UPPER MID VERY LATERAL**
- **PROS24 – 24 RIGHT APEX VERY LATERAL**
- **PROS24 – 25 LEFT SEMINAL VESICLE**
- **PROS24 – 26 RIGHT SEMINAL VESICLE**
- **PROS24 – 27 LEFT TRANSITION ZONE**
- **PROS24 – 28 RIGHT TRANSITION ZONE**

Prostate Diagram Directory

In order for the Prostate Diagrams themselves to be accessible to all Users, the Prostate Diagram Image Files should be stored in a shared folder on the fileserver. The Prostate Diagram Directory should be specified from the **Preference List Window** – *Site Wide Menu* – *Directories* menu item.

Defining Prostate Histogram Colors

There are 4 general Histogram Types. Each are listed below with their default color:

- Malignant (Adenocarcinoma) = Red
- HG/PIN = Yellow
- Atypia = Green
- Benign = White

Previously mentioned, each Prostate Diagram image file includes a color-coded Histogram Legend displaying the 4 Histogram Types. These 4 Histogram Colors are defined as they are above by default in the **Site Wide Preference Menu** – *Prostate Colors.*

If you would like to change the color of one or more Histogram Type:

1. You will need to modify the color-coded Histogram Legend on each of Psyche's Prostate Diagram Image files accordingly.

2. You will then need to modify the default histogram color in the **Site Wide Preference Menu** – *Prostate Colors* to match the legend.

Accessioning Prostate Cases

Prostate Cases may be accessioned using either the Prostate Case Type or the Surgical Case Type.

Accessioning Using the Prostate Case Type

1. In the **Accession Window**, select a Patient and Visit as described in *Chapter 3 – Accessioning*. From the Case type drop-down menu in the lower left, select the appropriate Prostate Case type.

2. Save the Case on the Case Tab of the Accession Window by clicking **Save Case**. After the Case number is assigned, the new **Prostate Selection Dialog** opens (Figure 9).

3. The **Prostate Selection Dialog** allows the user to select which Prostate Sector Diagram will be used for the case, it displays all of the corresponding sources for that sector and then it allows the user to select sectors as specimens for the case.

4. The drop-down menu in the lower left of the dialog displays the sector counts available. Each sector count in this drop-down menu corresponds to a respective Prostate Diagram: 1 Sector, 2 Sectors, 6 Sectors, 12 Sectors, 14 Sectors, 18 Sectors, 20 Sectors and 24 Sectors.

5. The default sector count in this drop-down menu is **06 Sectors**. If the Case Submitter has a default sector count defined in the Physicians Library, this sector count will override the default sector count **06 Sectors**.

6. To override the WindoPath default sector count or a Physician default sector count, select the desired sector count from the drop-down menu.

7. After selecting the appropriate sector count in the drop-down menu, the appropriate sector-specific sources will be displayed in the top list box. For each specimen received on the case, click on the correct source in the top list box to select the source for Specimen A, Specimen B, etc. Each selected sector will be added as a Specimen on the Case.

8. The order in which sectors are added as specimens does not matter. You are not required to select every sector listed in the top list box, only the sectors you need for the case specimens.

Figure 9 – **Prostate Selection Dialog**

9. To remove a selected sector specimen, click the sector you wish to remove in the lower list box.

10. Click **Done** and you will be brought back to the Case Tab. Click the **Specimen action button** to advance to the Specimen Tab. All of the sectors selected in the **Prostate Selection Dialogue** will automatically be listed in the list box on the Specimen Tab. You may enter any additional information (specimen comment, clinical info, etc.) for each specimen just like you would for any other surgical case, making sure to click **Save Specimen** to save the changes. Click **Done** to finish accessioning this case.

11. If you wish to add additional sectors or modify existing sectors, select *Specify Sectors* from the **Accession Window** – *Case Menu*. All sectors already selected will be highlighted in the list box. Click on highlighted sectors to deselect them or click on any additional sectors you wish to add to the Case and click **Done**. Click on the **Specimen tab** to view the modified sectors.

Accessioning Using the Surgical Case Type

1. In the **Accession Window**, select a Patient and Visit as described in *Chapter 3 – Accessioning*. From the Case type drop-down menu in the lower left, select the Surgical Case type.

2. Save the Case on the Case Tab of the Accession Window by clicking **Save Case**. Contrary to Accessioning with a Prostate Case Type, the **Prostate Selection Dialog** WILL NOT automatically open after the case number is assigned. You must manually open it.

3. Manually open the **Prostate Selection Dialog** by selecting *Specify Sectors* from the **Accession Window** – *Case Menu* or by hitting **CTRL+P.**

4. Follow steps 7 through 11 above to finish accessioning this Surgical Prostate Case.

Prostate Case Window

With the Prostate Module enabled, prostate results are entered in the **Prostate Case Window**, shown in Figure 10, as opposed to the **Quick Case Window** where other Case types are resulted.

Figure 10 – **Prostate Case Window**

Prostate Case Window Fields

- **Diagnosis** – the Diagnosis for the currently highlighted Specimen in the **Prostate Specimens List Box**. This is a required field for every specimen on the case. There is no character limit in this field and the text entered in this field will properly text wrap when it is displayed on the report in the Prostate Specimen Table **Diagnosis Column.**

After selecting a type and hitting the **Tab** key, WindoPath will automatically populate the **Diagnosis Field** with the type that was selected. For example, if the user selects the type **Atypia** for a Piece and then hits the **Tab** key, WindoPath will automatically populate the **Diagnosis Field** with the text **Atypia**.

Likewise, if there is more than 1 Piece (added to the specimen) each with a different type selected, WindoPath with favor the Piece with the most severe type and populates the **Diagnosis Field** with it. For example, if the user selects the type **Atypia** for Piece #1, selects the type **Adenocarcinoma** for Piece #2 and then hits the **Tab** key, WindoPath will automatically populate the **Diagnosis Field** with the text **Adenocarcinoma**.

You may choose leave this automatically-populated text as a diagnosis for the currently highlighted specimen or you may choose to delete the text and then manually enter a diagnosis or press **CTRL+L** to display entries from the **Phrases Library – Prostate Diagnosis Box**.

- **Cancer %** – manual override for the cancer percentage automatically calculated in the **Pieces List Box**.

- **Atypia** – you can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Atypia Box**.

- **Gleason** – the Gleason Score for the selected Specimen.

- **Perineural** – you can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Nerve Involvement Box**.

- **Specimen Information** – clinical information for the selected Specimen. You can type free text in this field or press **CTRL+L** to display entries from the **Paragraphs Library**.

- **Case Summary** – summary for the Case. You can type free text in this field or press **CTRL+L** to display entries from the **Paragraphs Library**.

- **Gross** – the gross description for the selected Specimen. You can type free text in this field or press **CTRL+L** to display entries from the **Paragraphs Library**.

- **Final Diagnosis** – the Diagnosis for the Case. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library, Final Prostate Diagnosis Box**.

Prostate Case Window Specimens List Box

The Prostate Case Window Specimens List Box displays information for all of the specimens on the Case one specimen per prostate sector.

- **#** – Specimen number/letter.

- **Site** – The Specimen Source.

- **Diagnosis** – The diagnosis entered for the current specimen.

- **Pieces** – The number of pieces included on the current specimen.

- **Canc.** − Cancer. The total number of pieces marked with the Type **Adenocarcinoma**.

- **G1** – Gleason Score 1.

- **G2** – Gleason Score 2.

- **%** – **Percent Cancer**. This column displays the total cancer % for all of the pieces included on the current specimen.

- **Atypia** – Optional Field. You may choose to use it if the current specimen is **Atypia** and further detail is needed. You can free text or select canned text from the Phrases Library, **Atypia Box** by hitting **CTRL+ L**.

- **Peri.** − **Perineural Involvement**. If the **Perineural** check box is check for the current specimen, this column will display a value of **True**. If unchecked, the column will display the value **False**.

- **Imgs.** − **Images**. This column displays the number of images added for the current specimen. If the specimen has no images associated with it, the column will display a value of **None**.

Prostate Case Window Pieces List Box

The Prostate Case Window Pieces List Box displays all of the pieces included on the specimen that is currently highlighted in the **Prostate Specimens List Box.** Each specimen has 1 piece by default. To add more pieces to the specimen currently highlighted, click the **Add** button. Click **Delete** to delete a piece from the specimen.

- **#** – Piece number.

- **Length** – The total length for the current piece (mm). This is a required field for each Piece included on each Specimen.

- **C Len.** − **Cancer Length**. If the current piece is malignant, use this field to enter a value for **Cancer Length**. If the Piece is NOT Malignant, do not enter any value in this field.

  If Reserved Preference O521, **Use Cancer Lengths for Prostates**, is set to **True** when the user enters values in both the **Length** and **C Len** columns for the current Piece, the total percent (%) cancer for that Piece will automatically calculate and display in the **% Column**. For example, if a Piece has a **Length** of 2 and a **C Len** of .5, then WindoPath will display 25% in the **% (Cancer) Column.**

  If Reserved Preference O521, **Use Cancer Lengths for Prostates**, is set to **False** (the more preferred setting for this preference), when the user enters values in both the **Length** and **% (Cancer)** columns for the current Piece a value for **Cancer Length** will automatically populate in the **C Len Column.** For example, if a Piece has a **Length** of 4 and a **% (Cancer)** of 50%, then WindoPath will display 2.0 automatically in the **C Len Column.**

- **%** – **Percent Cancer**. If the current piece is malignant, use this field to enter a value for **Percent Cancer**. If the Piece is NOT malignant, do not enter any value in this field. Depending on how Reserved Preference O521 is set, the user may either enter a value in this field manually or the user may enter values in both the **Length** and **C Len** columns and have WindoPath automatically populate a value in the **% (Cancer) Column.**

- **C Start** – **Cancer Start**. Entering a value for **Cancer Start** is optional. **Cancer Start** is defined as the measured mark (mm) out of the total length of the Piece the **Cancer Length** actually begins.

For example, let's say the current Piece has a value of 10 in the **Length Column** and a value of 5.0 in the **C Length Column**. If the user were to enter a value of 2.3 in the **C Start Column**, this is the same as saying that the total length of the Piece is 10.0mm, with the 5.0mm of cancer beginning at the 2.3mm mark.

If a value is optionally entered for **C Start**, WindoPath will reflect the Cancer Start value in color in the histogram that displays on the report for that sector.

- **Type – Histogram Type**. This is a required drop down field. Each Piece included on each Specimen must be assigned 1 of the 5 hard-coded Histogram Types: **Adenocarcinoma**, **High Grade**, **Atypia**, **Benign** and **Unknown**. After selecting a type from the drop down list, hit the **Tab** key to save the Histogram Type.

  With the exception of the type **Unknown**, the remaining 4 types are each associated with a unique, user-defined color. (Please refer to the section entitled **Prostate Preferences** later in this chapter for more information on how to set user-defined colors for the 4 histogram types.)

  After the user hits the **Tab** key to save the histogram type:

  a) WindoPath will display the text in the **Prostate Specimens List Box** for the current specimen in the corresponding color that is defined for the type selected.

  b) Display the Piece's corresponding histogram on the diagram on the report.

  When a specimen has more than 1 Piece, with each Piece assigned a different type, WindoPath will favor the color of the most severe type assigned to a Piece. For example, is a specimen has 2 Pieces and 1 Piece has a type of **Adenocarcinoma** define and the other Piece has a type of **Atypia** defined, WindoPath will favor the color defined for the type Adenocarcinoma (red) rather than favoring the color defined for the type **Atypia**.

  The user should only select the type **Unknown** if the current Piece on the Specimen was never received, is intangible or cannot be grossed or processed. When **Unknown** is selected, WindoPath will NOT DISPLAY a histogram for that Piece on the diagram because it does not exist.

Prostate Case Window Action Buttons

- **Charges** – opens the standard Charge Window for the case.

- **Add** – adds a piece to the **Pieces List Box** for the selected Specimen.

- **Delete** – deletes the selected piece from the **Pieces List Box**.

- **Next** – opens the Prostate Case Window for the next prostate case in the current Case List.

- **Previous** – opens the Prostate Case Window for the previous prostate case in the current Case List.

- **Preview** – opens a print preview of the Case report.

- **Sign Out** – opens the **Pathologist Signature Window** to sign out the Case. **Sign** is only available if the Case is at the status *Needs Signature* and the

current User has an associated Pathologist defined as a Signer. Refer to *Chapter 10 – Human Resources* for more information on User security.

- **Cancel** – closes the **Prostate Case Window** without saving any changes.

- **Done** – closes the **Prostate Case Window**, saving any changes.

Prostate Case Window Menus

Prostate Menu

- **Add Piece – ALT+A** – adds another piece in the **Pieces List Box** to the specimen currently highlighted

- **Next Piece** – **ALT+D** – selects the next piece in the **Pieces List Box**.

- **Next Sector** – **ALT+P** – selects the next sector in the **Specimens List Box**.

- **Previous Piece** – **ALT+SHIFT+D** – selects the previous piece in the **Pieces List Box**.

- **Previous Sector** – **ALT+SHIFT+P** – selects the previous sector in the **Specimens List Box**.

- **Rename Custom Sites** – Opens a prompt that allows the user to change the custom site names, if any exist on that case.

- **Go To Gross** – **CTRL+ALT+G** – moves the cursor to the Gross field.

- **Go To First Core** – **CTRL+ALT+C** – moved the cursor to the first core (or Piece) in the **Length Column** in the **Prostate Pieces List Box**.

- **Go To Specimen Information** – **CTRL+ALT+S** – moves the cursor to the Specimen Information field.

- **Fax/eMail Report** – opens the **Fax Recipient Dialog**, allowing the Case report to be faxed/e-mailed to one or more recipients.

- **Preview** – opens a print preview of the Case report.

- **Print** – opens the standard print window to print a copy of the Case report.

- **Accession Window** – opens the **Accession Window** for the Case.

- **Load Case – CTRL+K** – opens a prompt for case number entry. The entry box is displayed with separate fields for case letter prefix, year and accession number. Click **Done** to open the case entered in the entry box.

- **Quick View – ALT+Q** – opens the **Quick Case Window** for the Case.

- **Report Definition –** allows the User to see what report template this report is using.

- **Set Technical Charge Location – ALT+T –** opens the Locations List Box Window allowing the user to select and assign a pre-defined Technical Charge Location for the case.

- **Sign Out** – **ALT+X** – available if a gross and Diagnosis have been entered on each sector. Opens the **Pathologist Signature Dialog** allowing the Case to be signed out.

- **Unsign Out** – if the Case has been signed out, unsigns the Case and reverts the Case needs to *Needs Diagnosis*.

- **Images** – opens the Specimen Images List Box for the current specimen.
- **Special Flags – CTRL+ALT+F** – opens the Special Flag Dialog. Selecting a special flag from the drop-down menu sets the flag on all selected Cases.

Resulting Prostate Cases

Open any Prostate Case from the **Case List Window**. The **Prostate Case Window** opens (Figure 10).

All sectors on the case are listed in the **Specimens List Box**. The **Pieces List Box** to the right of the window displays all of the pieces for the specimen that is currently highlighted in the **Specimens List Box**.

Result Specimen Pieces (Grossing Specimens)

1. Highlight the first specimen sector (AKA Specimen A) and enter data for this specimen in the **Pieces List Box**. By default, one piece or core is entered on each sector and is listed in the **Pieces List Box**. To add more pieces to the specimen sector currently highlighted, click **Add.**

   *At a minimum, each Piece is required to have a value entered in the **Length** Column (total length of piece/core, mm) and in the **Type** Column.*

2. Enter a value in the **Length** Column.

3. Enter a value in the **Type** Column.

   - Classify the type of piece it is in the **Type** column by placing your cursor in the cell and selecting one of the following from the drop-down menu: **Adenocarcinoma, High Grade PIN, Atypia, Benign** or **Unknown.**

   - After selecting a **Type** from the drop-down menu, hit the **Tab** key to save and display the color-coded histogram type for that piece. Each Type has a default color code associated with it.

     NOTE: Each Type classification corresponds with the colors that are defined in the **Site Wide Preference Menu – Prostate Colors**. Refer to the section in this chapter titled **Defining Prostate Histogram Colors** for more information on how to define default prostate histogram type colors.

   For specimens with multiple Pieces with DIFFERENT Types selected, the histogram color that will display will be the Piece with the **most severe** Type selected. For example, if Specimen A Piece 1 is marked as Type **Adenocarcinoma** (Red) and Piece 2 is marked as Type **Atypia**, the histogram color will display in red.

4. There are 3 additional columns in the **Pieces List** Box that should only be used if the current piece is classified as type **Adenocarcinoma:**

   - **C Len (Cancer Length)** – This is the total Cancer Length in the current Piece. With Preference O521, **Use Cancer Lengths for Prostates**, set to **False**, WindoPath will auto calculate a value for Cancer Length if a value is also added to the **% (%Cancer)** Column for the piece.

- **% (Cancer %)** – This is the percent of cancer seen in the current Piece.

- **C Start (Cancer Start)** – A value for Cancer Start defines where, out of the total Length of the Piece (Length Column), the cancer begins. Entering data in this column is OPTIONAL.

Start by entering a value in the **%** Column (the % of cancer in the current piece). With Preference O521, **Use Cancer Lengths for Prostates**, set to **False**, place your cursor in the **C Len** Column and WindoPath will auto calculate and populate a value for Cancer Length in the cell.

5. Repeat steps 2, 3 and 4 for every Piece added to Specimen A.

6. A traditional **Gross Description** for each specimen may be entered in the OPTIONAL specimen-level field labeled **Gross.**

Next, enter a Gross Description for Specimen A. Highlight Specimen A in the **Specimens List Box**, then enter a Gross Description in the Gross Field Window. Free text can be entered as the gross description or press **CTRL+L** to display entries from the **Paragraphs Library**. Multiple paragraphs can be selected at one time by clicking on each selection in the order that you want them. The entire interpretation is built in the bottom of the window.

7. Unlike Surgical cases, WindoPath does NOT require entry of a Gross Description in the Gross Field for each specimen for the case status to advance to **Needs Diagnosis.** This is optional. The case status will advance from **Needs Gross** to **Needs Diagnosis** after every Piece listed on every Specimen for the case has a value entered in the **Length** column.

Resulting Prostate Specimens (Diagnosis Entry)

1. Highlight Specimen A in the **Specimens List Box.** In the **Diagnosis Field** below the **Specimens List Box**, the specimen's most severe Pieces Type Classification is displayed by default: Adenocarcinoma, High Grade PIN, Atypia or Benign.

You can opt to either free text additional data into the field following the default Type or hit **CTRL+L** to display entries from the **Phrases Library,** *Prostate Diagnosis Box*. Multiple paragraphs can be selected at one time by clicking on each selection in the order that you want them.

2. Every specimen on the case is required to have a diagnosis entered in the **Diagnosis** Field. Repeat Step 1 for every specimen on the case.

Optional Fields for Diagnosis Entry

- **Cancer %:** The **Cancer %** Field defines the total Cancer % for all of the pieces included on a given specimen. **This field is only used if the specimen has a malignant diagnosis.**

  - If you leave this field set to the default of **-1**, WindoPath will automatically calculate and display in the table the total Cancer % for the given specimen, taking into account EACH of the specimen's piece's entered in the **% Cancer** Column in the **Pieces List Box.**

    To override the specimen's automatic calculation for Cancer %, manually enter a value in the **Cancer %** Field (replacing the default of **-1**).

- **Perineural:** Check the check box if the specimen has Perineural involvement. Leave unchecked if it does not. **This field is only used is the specimen has a malignant diagnosis.**

- **Gleason:** The 4 number fields used to define a Gleason Score and any Gleason Percent values for the current specimen. **This field is only used is the specimen has a malignant diagnosis.**

- **Atypia:** This is an optional field. You may choose to use it if the current specimen is **Atypia** and further detail is needed. You can free text or select canned text from the Phrases Library, **Atypia Box** by hitting **CTRL+L**.

- **Specimen Information:** This is an optional field for entering any additional specimen-level information or comments. You can free text or hit **CTRL+L** to display entries from the **Paragraphs Library.**

Finalizing and Signing Out Prostate Cases

After a Diagnosis has been entered for every case specimen, the Case status will advance to **Needs Signature**. Prior to signing out the case, you may add optional case-level information in the **Case Summary** and **Final Diagnosis** Fields.

1. In the **Case Summary** Field, you may enter any summary notes or comments that apply to the entire case. You can free text or hit **CTRL+L** to display entries from the **Paragraphs Library.**

2. In the **Final Diagnosis** Field, enter a summary diagnosis for the case. You can free text or hit **CTRL+L** to display entries from the **Phrases Library, *Final Prostate Diagnosis Box***. Text entered in this field will display as a banner on the report in bold red font above the Prostate Table in the **Prostate Section** OR in the **Prostate Summary Section**.

3. The Prostate Case is signed out by clicking **Sign** or pressing **ALT+X**. The **Pathologist Signature Window** opens. The Pathologist assigned to the User account is highlighted in the list box. If this is not the Pathologist signing the Case, double click the correct Pathologist in the list. The Type column indicates whether each Pathologist is a Signer or Cyto Signer. Only Signers may sign out Cases from the **Prostate Result Window**.

4. Enter the electronic signature password of the Pathologist signing out the Case. This is the Pathologist whose signature appears on the report along with the facsimile signature, if one is stored for the Pathologist. Click **Done**.

5. The **Really sign out** prompt is displayed. Click **Yes** to sign out the Case. Click **No** to cancel the operation. After sign out, the Case is now at the status *Needs Final Report*.

Prostate Preferences

Site Wide Preference Menu Items

- **Directories** – Prostate Diagram Directory

- **Prostate Colors** – Used to define the 4 default Histogram Type Colors: **Malignant**, **High Grade PIN**, **Atypia** and **Benign**.

Reserved Preference Menu Items

- **Maximum Prostate Core Length for Histograms** – This preference allows the user to determine how long histograms are on the prostate diagram. This preference allows the lab to determine the length of histograms relate to core length in the prostate diagram.

  When this is a selected, a number prompter appears that allows the user to enter an integer value. The default is 30. This value is the divisor of a fraction whose numerator is the total length of all prostate cores for a section. The fraction determines what percentage of the maximum histogram width will be used to represent the core. For example, if the preference is set to 20 and there are 3 cores of 5 cm each for a total of 15 cm, the fraction will be 15 over 20 or 75%. The maximum histogram length for a 6 sector diagram is 70. So the length for the present histogram will be 75% of 70.

  Note that the maximum width for a 6 sector prostate is 70 regardless of the total length of cores. So if the cores amount to 25 in the example, making the fraction 25 over 20 or over 100%, the length of the histogram will still be 70. Also note that for diagrams with greater numbers of sectors, the maximum length is less. For example, for a 12 sector diagram, the maximum length of a histogram is half of 70.

Reserved Preferences

- **O515 Enable prostate cases** – must be set to **True** in order to process Prostate Cases. When this preference is set to **True**, the User is prompted to create sources for prostate Cases. Responding **Yes** to the prompt automatically creates source definitions in the correct **PROS** format.

- **O517 Put Gleason Score on prostate diagram** – **True**: Gleason scores appear on the prostate diagram below the histograms. **False**: Gleason scores do not appear on the prostate diagram at all.

- **O521 Use cancer lengths for prostates** – **True**: When the user enters a Length and a C Length (cancer length) for a piece, the % cancer will auto-calculate. (Example: Length of 2, C Length of .5, then the % cancer column will display 25%). **False**: When the user enters a value for Length and % Cancer for a piece, WindoPath will automatically calculate a value for C Length. (Example: Length of 4, % Cancer of 50, then the C Length will display 2.0).

- **O528 Enclose prostate table in grid** – **True**: Encloses the prostate table with a border and grid of rows and columns. **False**: Prostate table displays on report with no grid columns and rows.

- **O529 Double space prostate table** – **True**: Rows in prostate table will be double spaced. This only applies, however, if preference O528 **Enclose prostate table in grid** is also set to **False**. **False**: Rows in prostate table will be of one line.

- **O530 Sort prostate diagnosis by severity** – **True**: The diagnosis with the highest Gleason score is printed first in the list of prostate diagnoses and the one with the lowest score last. This allows the user to display prostate diagnoses with the most severe diagnosis at the top of the **False**: Diagnoses are displayed in the order the sectors were selected at the Specimen level.

- **O531 One histogram per prostate piece – True**: One histogram will be displayed on the diagram in each specimen sector **for each piece associated with that specimen.** So if there are 4 pieces, there will be 4 narrow histograms which display in the matching sector on the diagram. This allows the user to display the amount of cancer in each piece rather than in the sector as a whole. **False**: Diagram displays only 1 histogram for every specimen sector, regardless of how many pieces are associated with the specimen.

- **O549 Suppress predominant Gleason Score – True**: The Prostate Case window and the Prostate Diagram will not display the predominant Gleason score. This allows the pathologists who prefer NOT to use the predominant Gleason score to dispense with it. **False**: Predominant Gleason Score will display.

- **O550 Show mm designation for Length in prostate report table –** This preference works in tandem with preference O645 **Display all core lengths in prostate table**. **True**: Length column title of the prostate table displays as Core Length, mm if preference O645 is also set to **True**. However, if O645 is set to **False**, then the Length column title displays as Length, mm. **False**: No mm designation for Length displays at all. Length column title of the prostate table displays Length.

- **O551 Suppress Gleason Percentage – True**: If a specimen has a primary Gleason score of 4, 3% and a secondary Gleason score of 3, 3%, the Gleason Column in the prostate table will display the Gleason score as 7(4+3). **False**: If a specimen has a primary Gleason score of 4, 3% and a secondary Gleason score of 3, 3%, the Gleason Column in the prostate table will display the Gleason score as 7(4+3) (3% + 3%).

- **O559 Make all prostate histograms the same length – True**: all histograms that are displayed on the prostate diagram will be of the same length. **False**: the histograms are scaled to size.

- **O626 Draw monochrome patterns in prostate diagram histogram –** This preference is useful when printing prostate reports to a black and white only printer. **True**: The legend and histograms in the prostate diagram report section print as black, white, gray and a crosshatched pattern which is useful when not sending reports to a color printer or when faxing. This helps the user to be able to read the histograms when color is not available. **False**: The legend and histograms in the prostate diagram report section print with the colors that are defined in the Site Wide Preference Menu Item **Prostate Colors**.

- **O644 Suppress summary line in prostate section – True**: The last row summary line of the prostate table is removed. **False**: The summary line will display as the last row in the prostate table that displays on the report.

- **O645 Display all core lengths in prostate section – True:** No cancer percents are displayed at all in the Length column; ONLY every core/piece for the specimen displays, separated by commas. The column title displays as Core Length, mm. **False**: Cancer percents are displayed in parenthesis next to each core length that is displayed. The column title displays Length mm if O550 is set to **True** or it displays Length if O550 is set to **False**.

- **O657 Use smaller size for fixed length prostate histograms – True**: WindoPath will use shorter (20 versus 70) fixed-length histograms. Also, it will automatically use fixed length histogram regardless of the setting of

preference O559 **Make all prostate histograms the same length**. **False**: This will use the 70 fixed-length histograms.

So there are three meaningful combinations of these preferences which produce:
1. Variable length histograms (O559 **False** and O657 **True**)
2. Fix length histograms – short (O657 **True** and O559 **True**)
3. Fix length histograms – long

- **O660 Validate prostate final diagnosis level on sign out – True**: WindoPath will check Prostate cases on sign out to ensure that the Final Diagnosis cancer level matches the highest cancer level in the diagnoses list. If it doesn't, an error will display and the case will not be signed out. For example, a prostate case has six sectors, four of which are Benign, one is Atypia and one is High Grade PIN. The highest cancer level of these diagnoses is High Grade PIN. If the Final diagnosis is not also High Grade PIN, then an error will display.

- **O661 Read prostate coordinate files before every prostate report** – **True**: WindoPath will read the file, ProstateDiagramCoordinates.txt every time a prostate diagram section is printed. Otherwise, it reads the file only once and saves the contents in memory for future reports.

  *** If the file is in the folder and you want WindoPath to read it every time you preview a prostate case, set this preference to **True**. This can be useful when modifying the Histogram Coordinate Plot file for custom prostate diagrams.

  *** If the file is NOT in the folder and you are using Psyche's Prostate Diagrams, it does not matter how this preference is set.

- **O664 Print non-malignant prostate text in black** – The text for non-malignant diagnosis will print in black in the Prostate Result Window's Prostate Specimen List Box, as well as in the result table in the Prostate Report Section. Malignant Diagnosis will still display in red.

- **O707 Prostate histograms for non-malignant diagnosis reflect percentages** – **True**: When this preference is set to **True** (and O531 is also **True**), the histograms for Atypia and high grade PIN will reflect the cancer percentage entered for the individual pieces on the Prostate Window.

  ***This preference is only effective when used in conjunction with O531 (One histogram per prostate piece). Normally, the only histograms on the Prostate Diagram that reflect the cancer percentage are the ones showing a malignant diagnosis. Histograms for diagnoses of Atypia and high grade PIN are shown at 100% length.

- **O710 Suppress printing other images with the prostate diagram** – **True**: Normally, WindoPath will print other images along with the prostate diagram in the Prostate Diagram Section. Setting this to **True** will suppress that action and WindoPath will print the other images in their appropriate report section.

- **O712 Remove PNI column from Prostate section** – **True**: PNI column will not display in Prostate table. **False**: PNI column will display in Prostate table.

Prostate Report Formatting

Currently, there are three Sections in the Report Formatter that may be used specifically for Prostate Cases.

Report Formatter – Prostate Sections

- **Prostate Diagram Section** – displays a histogram for each sector with pieces. The Gleason score appears below each histogram if certain preferences are set.

- **Prostate Summary Section** – This section displays the Final Diagnosis, Highest Gleason Score and Tumor Involvement summary banner as centered text in bold, red font. Example below.

<div align="center" style="color:red;font-weight:bold">

Diagnosis: Adenocarcinoma
Highest Gleason Score: 7 (4 + 3); Tumor Involves 5 of 12 Cores

</div>

- **Prostate Section** – displays the color-coded contents of the **Specimens List Box** of the **Prostate Case Window** in a table including Specimen Number, Site, Diagnosis, Cores Involved, % Cancer, Gleason Score (if any), Core Length and PNI (Perineural Involvement). If the **Prostate Summary Section** is NOT included in the formatted Section Template, the Final Diagnosis and Highest Gleason Score summary banner will display above the table in bold, red font.

Using Customized Prostate Diagrams

Rather than using the Prostate Diagrams provided by Psyche, you have the option of using your own, self-provided, image files (.jpg) to display on your reports. With this option, you have the ability to plot histogram coordinates that are specific to your custom image files. Please contact your Application Specialist or WindoPath Support for set-up assistance.

Chapter 10 – Human Resources

Person Tab Window

Human Resources stores data pertaining to Pathologists, Patients, Physicians and Users. The **Person Tab Window** (AKA **Human Resources Window**) is opened by clicking **Human Resources** on the **Dispatcher Window** (Figure 1).
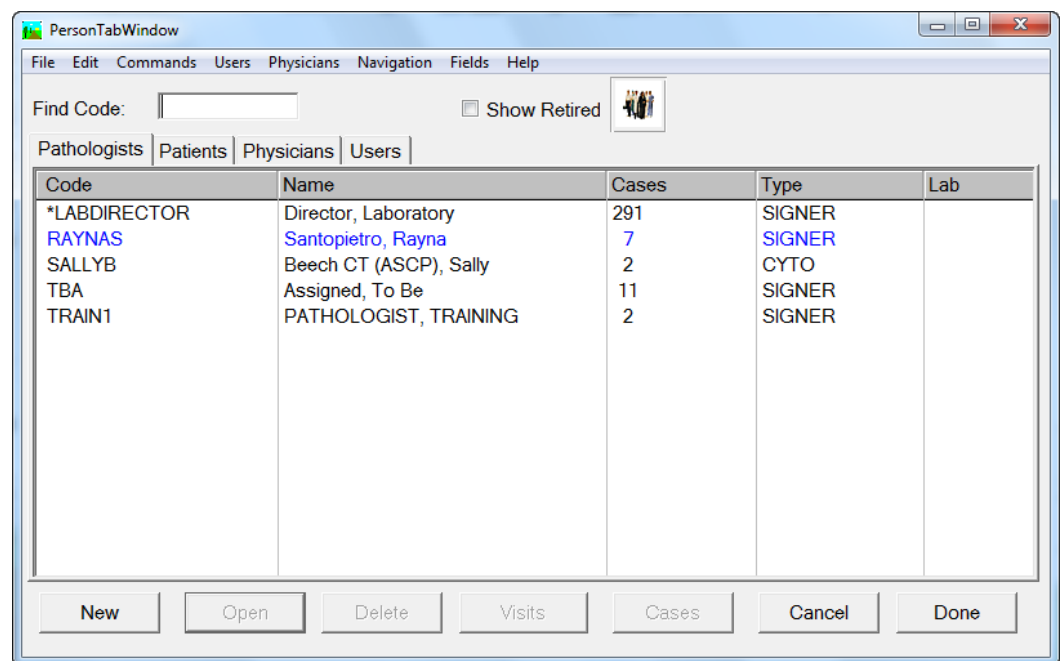
Figure 1 – **Person Tab Window**

Each of the tabs on the **Person Tab Window** opens a **List Window** for that type of person. For example, clicking the **Physicians tab** opens the **Physician List Window**.

Double clicking on a person in a **List Window** opens the window for that person.

Human Resources Window Find: field

To find a person by code, right-click in the Code column heading and type the code (or partial code) in the **Find: field**.

To find a person by name, right-click in the Name column heading and type the name (or partial name) in the **Find: field** in the format *lastname, firstname*.

Person Tab Window Action Buttons

- **New** – opens a blank window to add a new person to the library.

- **Open** – opens the window for the currently highlighted person.

- **Delete** – deletes the currently highlighted person. If the person has an existing Case, the message **You may not delete an item pointed to by existing item** is displayed and the deletion is not allowed.

- **Visits** – opens the **Visit List Window** (Figure 7) for the currently highlighted Patient.

- **Cases** – opens the **Case List Window** listing all current (active) Cases assigned to the currently highlighted person.

- **Cancel** – closes the **Human Resources Window**.

- **Done** – closes the **Human Resources Window**.

Human Resources Window Check Box

- **Show Retired** – by default, retired library entries are not displayed in the list box. To display retired entries, click this check box. Retired entries are displayed in red at the top of the list.

Human Resources Window Menus

Navigation Menu

- *Next Tab* – **CTRL+Right** – opens the next tab in the **Human Resources Window**.

- *Previous Tab* – **CTRL+Left** – opens the previous tab in the **Human Resources Window**.

Fields Menu

- *Save Field Settings* – after dragging and dropping the columns in the list window in the desired User-defined order, select this menu item. Respond **Yes** to the **Save Field Attributes** prompt to save the User-defined field settings.

- *Restore Field Settings* – if the columns in the list window have been rearranged temporarily, select this menu item to restore the User-defined field settings. Respond **Yes** to the **Restore Saved Field Attributes** prompt to restore the User-defined field settings.

- *Reset Fields* – restores the window's default field settings.

Pathologists

Click the **Pathologists tab** to add a new Pathologist to the library or to view, modify, delete or list Cases for an existing Pathologist. Click either **New** or **Open** from the **Pathologist List Window** (Figure 2) to open the **Pathologist Window** (Figure 3).

Pathologist List Window
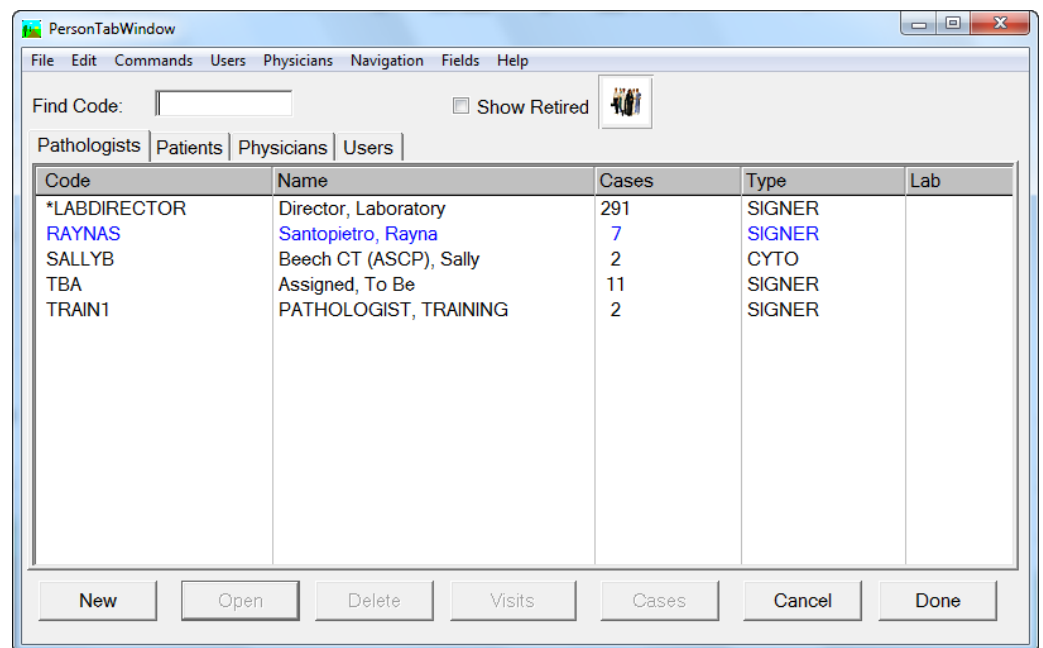
Figure 2 – **Pathologist List Window**

Pathologist List Window Columns

- **Code** – the unique identification code for the Pathologist.

- **Name** – the Pathologist's name in the format *lastname M.D., firstname.*

- **Cases** – the number of **active** Cases assigned to this Pathologist.

- **Type** – the type of signer; either Cyto or Signer.

- **Lab** – the Pathologist's Lab designation if using Site Security.

Pathologist Window

Pathologist Window Fields

- **ID** (**required field**) – the unique identification code for the Pathologist. It can consist of alpha and/or numeric characters.

- **Name** (**required field**) – name in the format *lastname M.D., firstname*. The Pathologist's name as it is entered here prints on Case reports, followed by the title specified below.

- **Title** – the Pathologist's full title. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Title Box**. The title appears on Case reports following the Pathologist's name.

- **Initials** – the Pathologist's initials.

Figure 3 – **Pathologist Window**

- **Provider #** – the Pathologist's provider number.

- **Electronic Signature** – the sign out password that the Pathologist must use when signing out Cases. This signature is not seen on the screen when typed, but is displayed as a series of stars (****). The password must be at least 6 characters long and contain at least one numeric character.

- **eMail address** – the Pathologist's e-mail address.

- **Rescreen%** – for Cyto Signers, allows specification of the percentage of normal Pap Cases signed out by this cytotech to be automatically flagged for Rescreen. This percentage overrides the rescreen percentage set for the Pap Case type.

- **Review%** – for Signers, allows specification of the percentage of Cases signed out by this Pathologist to be automatically flagged for Review. This percentage overrides the review percentage set for the Case type.

- **Facsimile** – displays the signature facsimile if one has been inserted via the *Pathologist Menu*.

Pathologist Window Action Buttons

- **Cancel** – closes the **Pathologist Window** without saving any changes.

- **Cases** – opens the **Case List** containing all the active Cases for the current Pathologist.

- **Create Case** – opens a blank **Accession Window** to create a new Case for the current Pathologist. Usually Cases are created using **Accession** on the **Dispatcher**, but there might be times when you must add a new Pathologist to the library or you might wish to view an existing Pathologist before

creating a Case. Refer to *Chapter 3 – Accessioning* for instructions on creating new Cases.

- **Done** – closes the **Pathologist Window** saving any changes.

Pathologist Window Check Boxes

- **Retired** – check this box to flag this Pathologist as inactive. This Pathologist will not appear in the **Pathologist List** when pressing **CTRL+L** in any field that accesses the **Pathologist Library**.

- **Cyto Only** – check this box to flag this Pathologist as a Cyto Signer. Cyto Signers may sign out only normal Pap Cases.

Pathologist Window Menu

Pathologist Menu

- **Show Facsimile** – opens the **Facsimile Window** to insert a signature facsimile. The Pathologist's signature is scanned into the computer using an image scanner, then converted into a bitmap file using the appropriate software.

Facsimile Window

Select *Show Facsimile* from the **Pathologist Window** – *Pathologist Menu* to open the **Facsimile Window**.

Facsimile Window Fields

- **Height** – the height of the current bitmap (in bits).
- **Width** – the width of the current bitmap (in bits).

Facsimile Window Action Buttons

- **Cancel** – closes the **Facsimile Window** without saving any changes.
- **Erase** – erases the current contents of the **Facsimile Window**.
- **Load** – opens the standard file selection window where the desired electronic signature bitmap file can be selected.
- **Copy** – copies the current bitmap to the PC's clipboard.
- **Paste** – pastes the bitmap from the PC's clipboard to the **Facsimile Window**.
- **Done** – closes the **Facsimile Window** saving any changes.
- **Show Actual Size** – not used.

Scanning a Facsimile Signature

Each person requiring a facsimile signature should sign with black ink on plain white paper so that the signatures are at least an inch apart and do not touch each other or any other text on the page. The signature should be the same size you wish to appear on reports.

Follow your scanner's instructions to scan each signature. The resolution should be set to 300 dpi with a picture type of grayscale/line art. Be sure to crop all extra white space from around each signature.

Save each signature as a .bmp file, name as desired and save in a shared directory folder.

Adding a Facsimile Signature to a Pathologist

- Click **Human Resources** on the **Dispatcher Window** to open the **Human Resources Window** (Figure 1).

- Click the **Pathologists tab.**

- Select the Pathologist whose signature you would like to add.

- Click **Open.**

- Select *Show Facsimile* from the *Pathologist Menu.*

- Click **Load.**

- Navigate to the folder where scanned signatures are stored.

- Select the appropriate signature (.jpg or .bmp file).

- Click **Open** (signature will be displayed in the **Facsimile Window**).

- Click **Done** to close the **Facsimile Window.**

- Signature will be displayed in the **Facsimile Box** on the **Pathologist Window** and will be printed on the report whenever this Pathologist signs out a Case or an Add-On item.

   NOTE: If the facsimile signature is too large, a message will be displayed and the load will be aborted.

Patients

Click the **Patients tab** on the **Human Resources Window** to add a new Patient to the library or to view, modify, delete or list Cases or Visits on an existing Patient. The **Patient List Window** shown in Figure 4 opens.

Click **New** or **Open** to open the **Patient Window** (Figure 5).

Patient List Window

Columns can be rearranged by clicking on a column and dragging and dropping it in the desired location.

Patient List Window Columns

- **Medrec** – the Patient's Medical Record Number.

- **Name** – the Patient's name in the format *lastname, firstname.*

- **DOB** – the Patient's date of birth in the format YYYY-MM-DD.

- **Visits** – the number of **active** Visits for this Patient.

- **Cases** – the number of **active** Cases for this Patient.
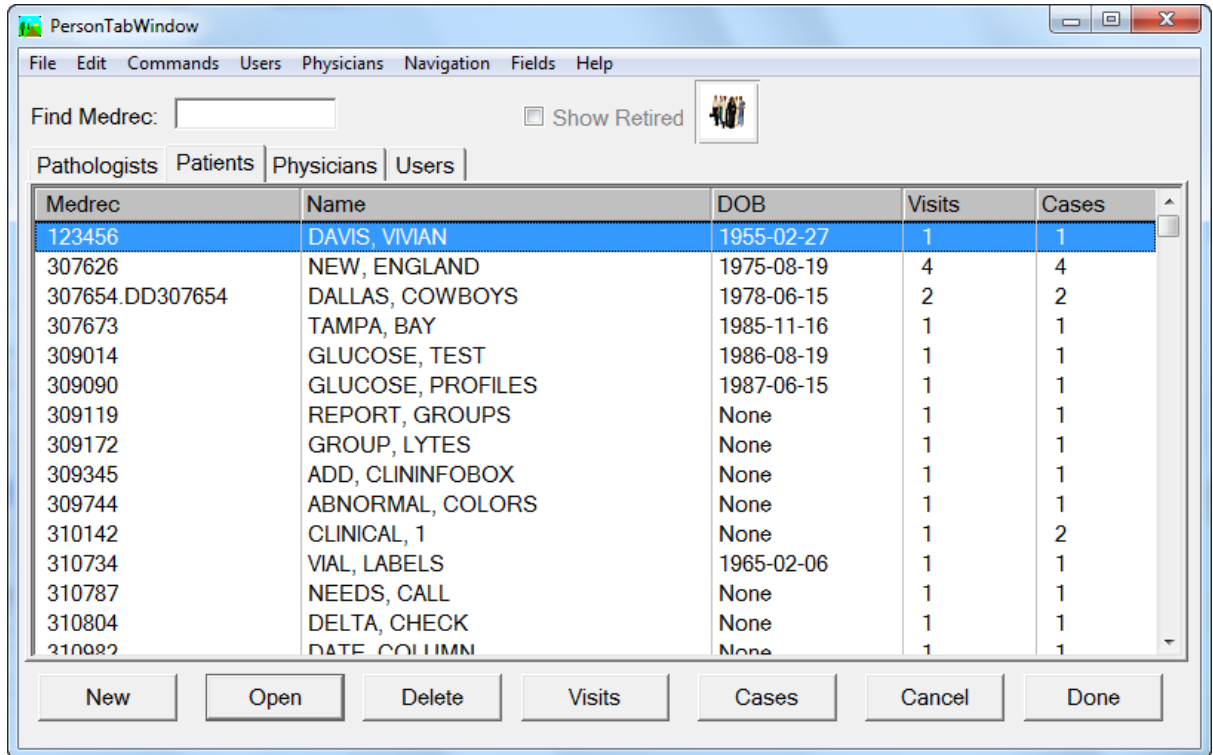
Figure 4 – **Patient List Window**

Patient Window

Patient Window Fields

- **MedRecNo (required field)** – the Patient's Medical Record Number which is **unique** for all Patients.

- **Name (required field)** – the Patient's name in the format *lastname, firstname*.

- **Sex (required field)** – the Patient's sex. Press **CTRL+L** to display entries from the **Phrases Library – Sex Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **DOB** – the Patient's date of birth in the format *MM DD YYYY*.

- **SSN** – the Patient's Social Security Number. **WindoPath** automatically inserts dashes in the proper places.

- **Phone** – the Patient's telephone number.

- **Medicare** – the Patient's Medicare number.

- **Insured By** – the Patient's insurer. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Insured By Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Insurance #** – the Patient's insurance number.

Figure 5 – **Patient Window**

- **Security Code** – the Patient's security code. Access to Patient records can be restricted to certain Users only. From the **User Window** – *User Menu* – *Additional Security* menu item, Patient security codes that may not be accessed by this User can be entered in the **Invalid Security Codes** list.

- **Street** – the Patient's street address.

- **City** – the name of the city where the Patient lives. You can type free text in this field or press **CTRL+L** to display entries from the **Zip Codes Library** (Zip codes and their associated cities). To select a library entry, highlight it and click **Select** or press **ENTER**. Selecting a city from the Library automatically fills in the **Zip field** with the city's Zip code.

You can limit the list to those Zip codes for a specific city by entering the Zip code (or partial Zip code) and pressing **CTRL+L**.

You can also enter a specific Zip code directly by typing the full Zip code and then pressing **CTRL+L**. Once a Zip code has been selected, the City, State and Zip code are all entered automatically.

- **County –** the Patient's county.

- **State** – the state where the Patient lives.

- **Zip** – the Zip code of the city where the Patient lives. You can type free text in this field or press **CTRL+L** to display entries from the **Zip Codes Library** (Zip codes and their associated cities.) To select a library entry, highlight it and click **Select** or press **ENTER**.

- **DOD** – the Patient's date of death for Autopsy Cases.

- **Web –** the Patient's password for logging into the E-Reports web-based inquiry module if installed.

- **QA –** QA information for the Patient record. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library User Fields Box.**

Patient Window (*Read-Only*) Fields

The following fields are *read-only* in the **Patient Window**. Most are associated with the Visit record and are described in the **Visit Window** section.

- **Account** – the Patient's account or billing number which is unique for all Visits. The account number of the Patient's most recent Visit is displayed.

- **Type** – the type designation for the Patient, for example, IN or OP.

- **Loc** – the Patient's location for the Visit, for example, ER or ICU.

- **Age** – the Patient's age that is automatically calculated from the date of birth.

- **Admitter** – the Patient's primary Physician usually responsible for the Patient's admission.

- **Consultor** – an optional second Physician.

- **Comment** – an optional comment.

- **Soundex** – the phonetic abbreviation of the Patient's name consisting of the first two letters of the last name and then every consonant thereafter of the last name and the first name.

- **Links List Box –** displays any Patients linked to the current Patient. Refer to the section entitled **Linking Patients** in *Chapter 12 – The Archives*.

Patient Window Action Buttons

- **Cases** – opens the **Case List Window** listing all current (active) Cases for the Patient.

- **Create Case** – opens a blank **Accession Window** to create a new Case for the current Patient. Usually Cases are created using **Accession** on the **Dispatcher**, but there might be times when you wish to review the Patient

or Visit records before creating a Case. Refer to *Chapter 3 – Accessioning* for instructions on creating new Cases.

- **Visits** – opens the **Visit List Window** (Figure 7) for the Patient.

- **Create Visit** – opens a **Visit Window** for the current Patient so that a new Visit can be created. The Patient's name and Medical Record Number are automatically displayed from the Patient record. The current date is inserted in the **Admit field** and the Age is calculated from the date of birth stored in the Patient record.

- **Save** – saves new Patients. After entering the new Patient's name, Medical Record Number, Sex and Date of Birth, **Save** becomes enabled. Click **Save** at any time to save the Patient record with the currently displayed data. Once the Patient has been saved, **Create Visit** becomes enabled so that a Visit can be created for this Patient.

- **Done** – closes the **Patient Window** saving any changes.

Patient Window Menus

Patient Menu

- *Show Patient History* **–** opens the Patient's **History Window** shown in Figure 6, which lists the first line of all the Diagnoses that have been entered on the Patient.

- *Print Patient History* **–** opens the standard print window allowing you to print the Patient's history to a specified printer. The printed Patient history includes Case number, received date and Diagnosis. Cases that have not yet been diagnosed do not print on the Patient history.

- *Generate Code* **–** automatically generates a Medical Record Number if the cursor is in the **MedRecNo field**.

- *Add Archive Cases* **–** opens the **Accession Window** with *Enter Archive Cases* selected from the *Case Menu*. Entering Archive Cases is described in *Chapter 3 – Accessioning*.

History Window

The History Window lists all past Diagnoses for the current Patient.

History Window Columns

- **S** – if flagged with a *, indicates that the Case has been signed out.

- **A** – if flagged with a *, indicates that the Case is active.

- **Medrec** – the Patient's Medical Record Number.

- **Case** – the Case number for the listed Diagnosis.

- **Received** – the Received Date for the Case.

- **Source** – the Specimen Source for the listed Diagnosis.

- **Modifier** – the Source modifier for the Specimen.

- **Diagnosis** – the text of the Diagnosis.

- **Note** – the Diagnosis Note for the listed Diagnosis.

- **Procedure** – the procedure or test on the current specimen (used mostly for Clinical Procedures).

Figure 6 – **History Window**

- **Result** – the numerical result for the Procedure ordered (used mostly for Clinical Procedures).

- **Result Text** – the text result (if any) for the Procedure ordered (used mostly for Clinical Procedures).

- **Sup** – if flagged with a Y, indicates that the Case has a Supplemental Report.

- **Code** – the Diagnosis Code for the listed Diagnosis.

- **Database** – the database the historical case is located in.

History Window Action Buttons

- **Show Diagnosis** – displays the full text of the highlighted Diagnosis.

- **Show Sup Rep** – displays the Supplemental Report for the highlighted Case.

- **Show Case** – opens the **Quick Case Window** for the highlighted Case. The **Quick Case Window** is described in *Chapter 4 – Current Cases, Grossing and Result Entry*.

- **Matching Patients** – Opens the **Matching Patient Window**.

- **Cancel** – closes the **History Window**.

- **Done** – closes the **History Window**.

Visits

Once a Patient has been added to the library, you can create Visits for that Patient. Click **Visits** from either the **Patient List Window** (Figure 4) or the **Patient Window** (Figure 5) to open the **Visit List Window** shown in Figure 7.

Visit List Window
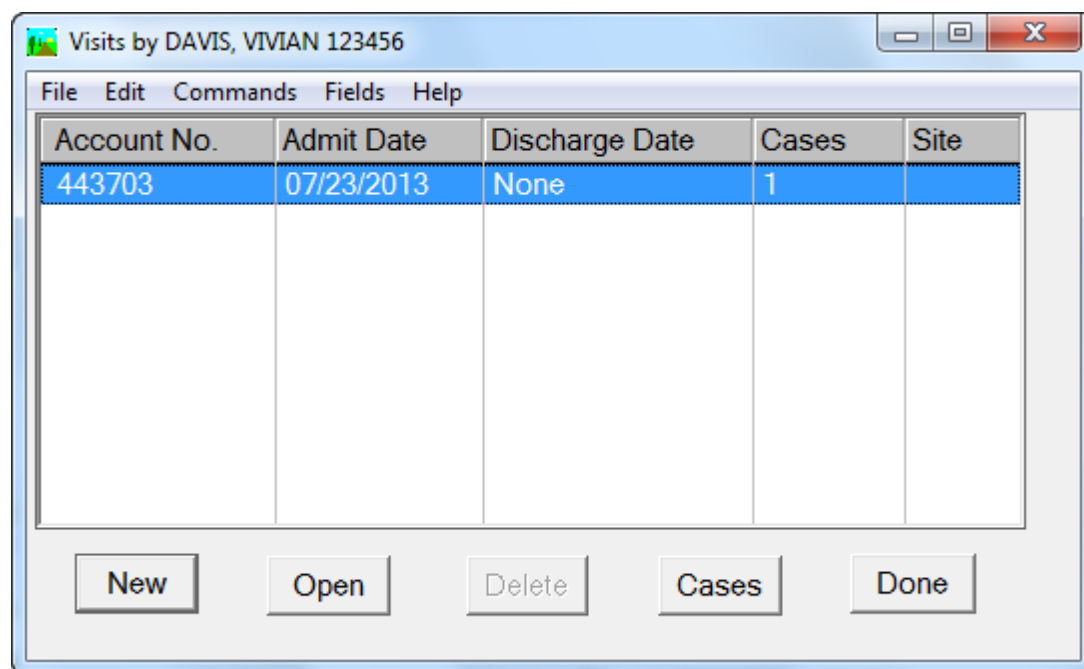
Figure 7 – **Visit List Window**

Visit List Window Columns

- **Account No.** – the Patient's account or billing number.

- **Admit Date** – the Patient's admit date for the Visit.

- **Discharge Date** – the Patient's discharge date for the Visit.

- **Cases** – the number of **active** Cases associated with the Visit.

- **Site** – the location designation for the Visit or the site designation for the Visit (if the preference to use Site Security is enabled).

Visit Window

Visit Window Fields

- **Account (required field)** – the Patient's account or billing number, which is **unique** for all Visits. You can type free text in this field or press **CTRL+L** for **WindoPath** to generate a random unique account number.

- **Name** – the Patient's name in the format *lastname, firstname*.

- **AKA** – (Also Known As) – alternate name for the Patient. When Patients are merged (as described in *Chapter 12 – The Archives*), the name of the deleted Patient is inserted automatically in this field. Free text entry is not allowed in this field.

- **Type** – the Type designation for the Patient, for example IN or OP. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Patient Type Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

Figure 8 – **Visit Window**

- **Admit** – the Patient's admit date for the current Visit. This field is automatically filled in with today's date. To enter a different date, delete the current date and type free text in this field.

- **Discharge** – the Patient's discharge date for the current Visit.

- **Location** – the location of the Patient for this Visit. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library-Location Box**. To select a library entry, highlight it and click **Select** or press **ENTER**. This field can also be filled in automatically when selecting a Submitter on the Case tab. Refer to *Chapter 3 – Accessioning* for more information.

- **Age** – the Patient's age at the time of the Visit. The age is calculated as the difference between the DOB on the Patient record and the admit date on the Visit record. If either of these fields is blank, the age will be calculated as 0 (zero). This is a *read-only* field and cannot be modified.

- **Medrec –** the Patient's Medical Record Number that is unique for all Patients. This is a *read-only* field and cannot be modified.

- **Admitter**> **Comment –** any comment that might have been added to the Visit. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Comment Box**. To select a library entry, highlight it and click **Select** or press **ENTER** the Physician who admitted the Patient. The > sign before this field indicates that this entry must be made from the Library in one of the following ways:

  1. Display the complete **Physicians Library** by pressing **CTRL+L**. A double-paned window will open. The upper list box displays the complete **Physicians Library**. The lower list box displays each Physician Fax location specified for that Physician in Human Resources. (Refer to *Chapter 10 – Human Resources* for more information about the **Physician Fax Window**.) Physicians are listed in order by code. You can display the list in alphabetical order by name by right clicking on the Name column heading. To find a specific Physician by name, right click on the Name column heading and enter the name (or partial name) in the **Find Name: field**. Follow the instructions below for **Selecting an Admitter**.

     Selecting an Admitter:

     To select an Admitter ONLY, highlight the name in the upper list box and click **Select Physician**.

     To select an Admitter AND a specific Physician Fax location, highlight the name in the upper list box AND a location code in the lower list box. Click **Select Location**.

  2. Enter the full or partial name of the Physician and press **CTRL+L**. All Physicians matching the entered criteria will be listed. Follow the instructions above for **Selecting an Admitter**.

  3. Type the pound sign (#) followed by the complete Physician code and press **CTRL+L**. If the Physician has only one Physician Fax location, the Admitter and location will be entered automatically. If the Physician has more than one Physician Fax location, a list of locations will be displayed. Follow the instructions above for **Selecting an Admitter**.

  4. Type the complete Physician code and press **CTRL+SHIFT+L**. If the Physician has only one Physician Fax location, the Submitter and location will be entered automatically. If the Physician has more than one Physician Fax location, a list of locations will be displayed. Follow the instructions above for **Selecting an Admitter**.

- **Consultor**> **–** an optional second Physician associated with the Visit. Consultor entry is performed in the same manner as Admitter entry, described above.

- **Comment –** any comment that might have been added to the Visit. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Comment Box**. To select a library entry, highlight it and click **Select** or press **ENTER**

- **Extra Field 1/Extra Field 2 –** two User-defined fields that can be used to store information related to the Visit. If you wish to use these fields, notify your instructor of the descriptions you wish to use for these fields. You can type free text in these fields or press **CTRL+L** to display entries from the

Phrases Library – Extra One Box/Extra Two Box. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **User 1-3** – three User-defined fields that can be used to store information related to the Visit.

- **Lab –** if the preference to use Site Security is enabled, displays the site designation for the Visit.

Visit Window Action Buttons

- **Cancel** – closes the **Visit Window** without saving any changes.

- **Create Case** – opens a blank **Accession Window** to create a new Case for the current Patient. Usually Cases are created using **Accession** on the **Dispatcher** but there might be times when you wish to review the Patient or Visit records before creating a Case. Refer to *Chapter 3 – Accessioning* for instructions on creating new Cases.

- **Cases** – opens the **Case List** listing Cases associated with this Visit.

- **Patient** – opens the **Patient Window** for the Patient associated with this Visit.

- **Save** – saves new Visits. After the account number has been entered, **Save** is enabled.

- **Done** – closes the **Visit Window** saving any changes.

Visit Window Menus

Visit Menu

- *Generate Account Number* – automatically generates an account number if the cursor is in the **Account field**.

- *Show Patient History* – opens the **History Window** shown in Figure 6.

- *Billing* – opens the Billing Window for the current Visit. Refer to the section entitled **Billing Window** in *Chapter 2 – Patients & Visits*.

Physicians

Click the **Physicians tab** to add a new Physician to the library or to view, modify, delete or list Cases for an existing Physician. Click either **New** or **Open** from the **Physician List Window** (Figure 9) to open the **Physician Window** (Figure 10).

Physician List Window

Physician List Window Columns

- **Code** – the unique identification code for the Physician.

- **Name** – the Physician's name in the format *lastname M.D., firstname.*

- **Address** – the Physician's street address.

- **UPIN** – the Physician's UPIN number.

- **Cases** – the number of **active** Cases assigned to the Physician.

- **Grp** – displays an X if the Physician is flagged as a Group Physician.

- **Comment** – an optional user-defined comment associated with the Physician.
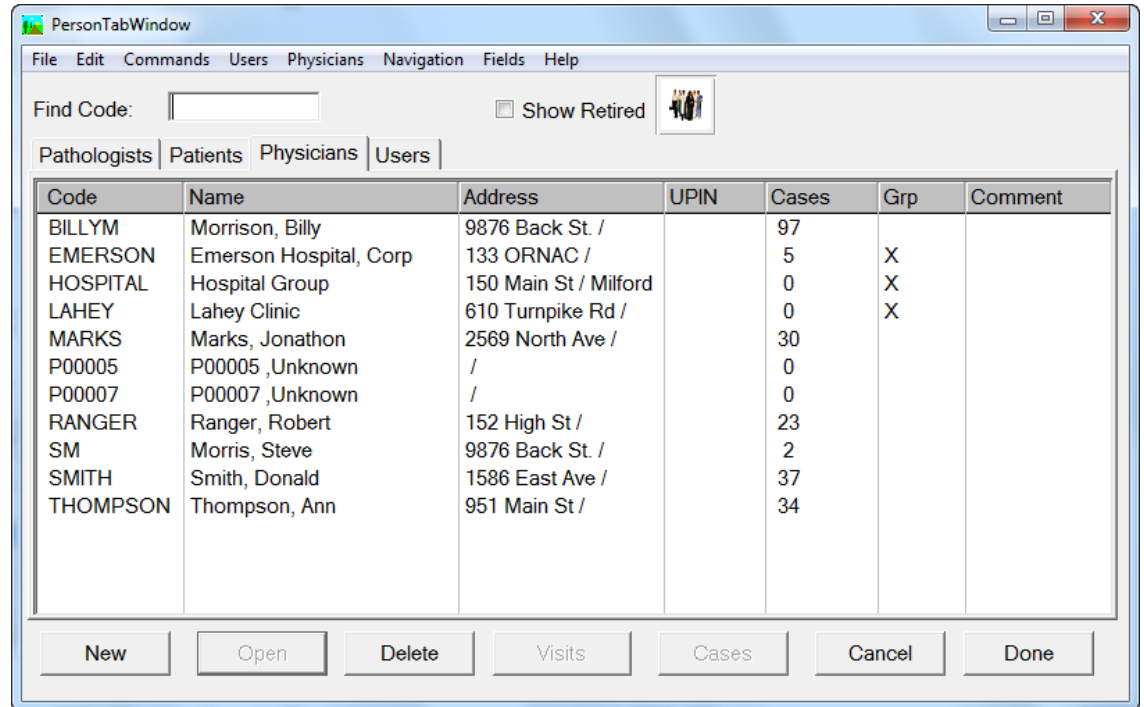
Figure 9 – **Physician List Window**

Physician Window

Physician Window Fields

- **ID (required field)** – displays the unique identification code for the Physician. It can consist of alpha and/or numeric characters.

- **Name (required field)** – the Physician's name in the format *lastname M.D., firstname*.

- **Degrees** – the Physician's degrees, separated by commas (ex: MD, PhD). NOTE: if using this field, it is not necessary to include the degree(s) in the Name field.

- **ICD** – the ICD code associated with the Physician.

- **Street** – the Physician's street address.

- **Street2** – the second line of the Physician's street address.

- **Street3** – the third line of the Physician's street address.

- **City** – the Physician's city.

- **County** – the Physician's county.

- **State** – the Physician's state.
- **Zip** – the Physician's Zip code.
- **Order** – not used.

Figure 10 – **Physician Window**

- **Contact** – the contact name for the Physician.
- **After Hrs Phone** – the Physician's after hours telephone number.
- **Specialty** – the Physician's medical specialty.
- **Stop** – the Physician's mail stop.
- **Library** – free text field.
- **Web PW** – the Physician's password for logging into the E-Reports web-based inquiry module (if installed).
- **eMail** – the Physician's e-mail address.
- **Fee Sched** – the Physician's fee schedule. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library** –

Schedule Box. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **PIN** – the Physician's PIN number.

- **UPIN** – the Physician's UPIN number.

- **NPI** – the Physician's NPI number. Entries in this field must be a 10-digit numeric.

- **Assign to Location** – when printing collated reports, if a report has a location in the **Extra1 field** of the Visit, all Physicians with a matching location in this field will receive a copy of the report. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Extra One Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Instructions** – if the Physician assigned to the case has data populated in this field, a pop up box will display every time any user opens the case.

- **Priv. Text** – if the Physician assigned to the case has data populated in this field, this data will display in the **Quick Case Window Private Tab**. Reserved Preference O207 is used to determine which Users may or may not access the data on the **Private Tab.**

- **Panel** – default Physician Panel for the current Physician. Use **CTRL+L** to pull from the **Physician Panels Library**. Whenever this Physician is assigned to a case, this default Physician Panel will be automatically ordered.

- **Always Assign to Case Type** – a drop-down menu of all available Case types. When printing collated reports, for each report of a specific Case type, a copy will be printed for each Physician with that Case type selected in this field. This field is only available when the **Assign to All Cases** check box is not checked.

- **Label** – press **CTRL+L** to select a default label template from the Report Fields Templates in the Formatter. The selected label will be used when this Physician is assigned to the case. The pick list for this field is a list of histology report field templates. The user may associate one such template with each physician. When subsequently procedure labels are printed, if a label is printed for a case whose submitter is a physician with an assigned template, the assigned template will be used in place of the template selected in the dialog that appears when printing is initiated. This allows the lab to assign a dedicated procedure label format to each physician.

- **Always use masthead** – a drop-down menu of all available mastheads. The selected masthead will be used on case reports that are printed for this physician's cases.

Physician Window List Boxes

- **Locations List** – lists each physician fax location where the Physician may receive printed, faxed and/or e-mailed reports. Double click on a location in the list to open the **Physician Fax Window** (Figure 11) for the specified location.

- **Members of Group** – if the Physician is flagged as a Group Physician, lists all Physician locations that are assigned to this group.

- **Reflex Rules List** – lists the reflex rules that are associated with this physician.

Physician Window Action Buttons

- **Add** – opens the **Physician Fax Window** to add a new print/fax/e-mail location for this Physician.

- **Delete** – deletes the print/fax/e-mail location highlighted in the **Physician Fax List**.

- **Add** – opens a new **Physician Window** so user can create a new Physician in the Physician Library and add this Physician to the current group at the same time.

- **Show Cases** – opens the **Case List** displaying all current (active) Cases for this Physician.

- **Done** – closes the **Physician Window** saving any changes. NOTE: Each Physician is required to have at least one Physician Fax location. When creating a new Physician, the Physician Fax location must be created in order for the **Done button** to become enabled.

Physician Window Check Boxes

- **Retired –** check this box to flag this Physician as inactive. This Physician will not appear in the **Physician List** when pressing **CTRL+L** in any field that accesses the **Physicians Library**.

- **Assign to All Cases** – check this box to flag this Physician to receive a copy of every Case report when printing **Collated by Physician Location** or **Collated by Physician Group**. This will generally be a department rather than an actual Physician, for example, Medical Records or Billing. In the **Physician Fax Window** for this Physician, select the appropriate printer from the Printer drop-down menu where reports for this Physician should be printed.

- **Don't Print Charges** – when printing reports for this Physician, do not print the Charges section, even if the preference to print charges on final reports is set to **True**.

- **Print Charges Only –** when printing reports for this Physician, print only the Charges section.

- **Print malignants first –** if the diagnosis of one or more specimen source has been flagged as **malignant**, the cases with malignant diagnoses will be printed first for this physician.

- **Send partial results –** used for Clinical cases; when a Profile is advanced to final status, if the physician assigned to the case has this checkbox checked, the physician gets a partial report of only the completed results.

- **Suppress Needs Clinical** – when the **Needs Clinical Results** preference is set to **True**, this checkbox skips that step for the current physician. Consequently, if a Pap is signed out and the HPV is pending, the Pap Case will advance to **Needs Final Report**. After the HPV is resulted, the case will go to **Needs Final Rep**.

- **New results only –** when checked along with **Send Partial Results** checkbox, if the physician has received some but not all results previously,

when the remaining results become available this physician will only receive the new results rather than a comprehensive report.

- **Group** – flags this Physician as being a Group Physician. Physician fax locations can be assigned as group members via the **Group field** on the **Physician Fax Window**. Final reports can be printed collated by group.

- **Prostate Sectors** – the default number of sectors to select when accessioning Prostate Cases for this Physician. Prostate Cases are described in *Chapter 9*.

Physician Window Menu

Physician Menu

- *Assign Report Definition* – opens a window allowing the user to assign a report definition and a case type to the current physician.

- *Comment* – optional text comment associated with this Physician record. This comment can be printed on reports.

- *Demographic Profile* – for use with the WindoPath Outreach system only.

Physician Fax Window

Double click on any Physician Fax location in the **Physician Window** – Physician Fax List to open the **Physician Fax Window**.

NOTE: Every Physician must have at least one Physician Fax location. If one is not created by the user, WindoPath will automatically create one coded **None**.

Physician Fax Window Fields

- **Location Code** – the Physician's location for this printer, fax number or e-mail address if the Physician is to receive printed or faxed reports.

- **Phone –** the Physician's telephone number for this location.

- **Group –** the group physician that this Physician location belongs to. Press **CTRL+L** to display entries from the **Physicians Library**. To select a library entry, highlight it and click **Select** or press **ENTER.**

- **Yellow Pages> –** the group practice that this Physician location belongs to. Press **CTRL+L** to display entries from the **Yellow Pages Library**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Modem** – the telephone number for the Physician's modem where Case reports are to be printed (if Modem Printing Interface has been installed).

- **Email –** the Physician's e-mail address for this location.

- **Fax –** the fax number for the Physician's fax machine where Case reports are to be faxed.

- **Email2** – the Physician's second e-mail address for this location.

- **Fax2** - the second fax number for the Physician's fax machine where Case reports are to be faxed.

*Figure 11 – **Physician Fax Window***

- **Printer** – the printer where the Physician's reports are to be printed (for use with *Collate by Physician Location* and *Collate by Physician Group* print functions only).

- **Street** – the Physician's street address for this location.

- **Street2** – the second line of the Physician's street address for this location.

- **Street3** – the third line of the Physician's street address for this location.

- **City** – the Physician's city for this location.

- **State** – the Physician's state for this location.

- **Zip** – the Physician's Zip code for this location.

- **Add'l Procedure** – press **CTRL**+L to open the Procedures Library pick list. When a Profile is ordered on a physician with an assigned additional Procedure, that Procedure is automatically added to the Profile. This allows the lab to specify that a physician should automatically have a particular Procedure added to every profile ordered.

- **Copies** – the number of copies of each Case report to be printed for this location.

Physician Fax Window Action Buttons

- **Show Cases** – opens the **Case List** displaying all current (active) Cases for this Physician location.

- **Cancel** – closes the **Physician Fax Window** without saving any changes

- **Done** – closes the **Physician Fax Window** saving any changes.

Physician Fax Window List Box

- **Case Types** – a list of all available Case types and the reporting status for each. Click on one or more Case types to select it, then click one of the **How to Report radio buttons** to set the print/fax status for each selected Case type.

Physician Fax Window Check Boxes

- **Retired** – check this box to flag this Physician location as inactive. This Physician location will not appear in the **Physician List** when pressing **CTRL+L** in any field that accesses the **Physicians Library**.

- **Default Physician Location** – flags this location as being the Physician's default location.

- **After** – this box can be checked in order for Physicians to receive faxed reports at a specific time. The Physician's reports are sent from the fax queue the time specified in the **After field**. If the **After Box** is not checked, reports are sent from the fax queue in the order in which they were received.

- **Before** – this box can be checked in order for Physicians to receive faxed reports at a specific time. The Physician's reports are sent from the fax queue the time specified in the **Before field**. If the **Before Box** is not checked, reports are sent from the fax queue in the order in which they were received.

- **Sun...Sat** – check the box for each day of the week you want facsimile reports to be sent to the Physician.

- **Withhold Group Results** – used only if your lab has Outreach and distributes reports via Outreach to group physicians. This will ensure that the selected physician can only retrieve results for themselves and not for the entire group.

- **Autofax** – checking the **Autofax Checkbox** causes the **Autofax** column to be set to **T** or **True**. This indicates that cases of this type should be automatically faxed when a pathologist signs out the case. This allows a pathologist to set up certain cases to be automatically faxed when the case is signed out and other to not be faxed.

Physician Fax Window Radio Buttons

- **Report Only** – for batch reporting, click this button if you want the Physician to receive only printed reports for selected Case types.

- **Report and Fax/email** – for batch reporting, click this button if you want the Physician to receive both printed and faxed reports for selected Case types.

- **Fax/eMail Only** – for batch reporting, click this button if you want the Physician to receive only faxed reports for selected Case types.

- **Neither** – for batch reporting, click this button if you do not want the Physician to receive a report for selected Case types.

Setting Up Physician Groups and Group Members

You can create Groups of Physicians in the Physician Library and then add group members to the group.

Physician records that are considered **Group Physicians** do not actually appear in Physician Pick Lists in WindoPath nor are they assigned directly to Cases. However, a group member Physician Fax Location may be assigned to Cases.

When printing reports *Collated by Physician Group*, a report copy will be printed for each group as well as each group member assigned to a Case. If the reserved preference **When collating by group, include physician copy** is set to **False**, a report copy will be printed only for the actual group but not the group member(s) assigned to the Case.

1. Create a Physician entry for the actual group in the **Physicians Library**. Ex: Omni Dermatology, LLC.

2. Click the **Group** check box to make the entry a **Group**.

3. Click **Add** on the **Physician Window** to open the **Physician Fax Window**.

4. Type the Physician's location in the **Location Code field** (example: East Side Office).

5. Type the Physician's fax number for the specified location in the **Fax field**. Click the check box for each day of the week on which the Physician is to receive faxed reports.

6. Select the appropriate printer for the group.

7. Select the appropriate **How to Report** method for each Case type.

8. Click **Done** to save the Physician Fax Location.

Add an Existing Physician as a Group Member

1. In the **Physician List Window,** open the Physician you wish to add to a Physician Group.

2. Select the Physician Fax Location you wish to add to a Physician Group. Double click to open the **Physician Fax Location Window**.

3. In the **Group** field hit **CTRL+L** to open a list box displaying all of the Physicians in the Physician Library marked **Group**; that is, the Physicians listed all have the **Group Check Box** checked.

4. Select the appropriate group that you wish to add the current Physician Fax Location to, then click **Select.**

5. Click **Done** to save the Physician Fax Location.

6. To confirm the Physician Fax Location was successfully added to the Group, return to the **Physician List Window** and open the Group Physician. All group members of that group are listed in the **Members of Group List Box.**

Add a New Physician as a Group Member

If you wish to add a group member to a Physician Group that does not already exist in the Physician Library, you can add a new physician to the Physician Library and add it to a Physician Group at the same time on the fly.

1. In the **Physician List Window,** open the Physician Group. Click **Add** above the **Members of Group List Box.**

2. A new Physician Window will open. By default, WindoPath will populate the ID field with a random code, the Name field with **Enter, Name** and it will create a Physician Fax Location coded **None**.

3. Repeat steps 2 – 5 in the above section *Add an Existing Physician as a Group Member.*

4. In the Physician Window, click **Done** to save the Physician Entry to the Physician Library.

5. To confirm that the new Physician was properly created and saved in the Physician Library, locate the physician in the **Physician List Window** and open the physician account to verify.

6. To confirm the Physician Fax Location was successfully added to the Group, return to the **Physician List Window** and open the Group Physician. All group members of that group are listed in the **Members of Group List Box.**

Setting Up Physicians for Collated Printing/Faxing

For Batch Faxing

1. Click **Add** on the **Physician Window** to open the **Physician Fax Window**.

2. Type the Physician's location in the **Location Code field** (example: CLINIC).

3. Type the Physician's fax number for the specified location in the **Fax field**.

4. Click the check box for each day of the week on which the Physician is to receive faxed reports.

5. Optionally, click the Before and/or After check boxes and enter the times of day when the Physician is to received faxed reports.

6. Highlight the desired Case types in the **Case Types List** and click the **Report and Fax/eMail check box** or **Fax/eMail Only check box**.

7. Click **Done**.

8. When batch faxing reports, the fax will be sent to the fax number specified in the **Physician Fax Window** for the designated location.

9. Repeat from Step 1 for each of the Physician's fax locations.

For Printing Collated by Physician Location or Collated by Physician Group

NOTE: A print queue for each Physician's printer must be installed on every PC that will be printing reports *Collated by Physician Location* or *Collated by Physician*

Group. The printer name specified in the drop-down printer list must match the name of a print queue installed on the PC. All print queues on all PCs must use the same naming convention.

1. Click **Add** on the **Physician Window** to open the **Physician Fax Window**.

2. Type the Physician's location in the **Location Code field** (example: CLINIC).

3. From the **Printer** drop-down menu, select the Physician's printer from the list.

4. Highlight the desired Case types in the **Case Types List** and click the **Report and Fax/eMail check box** or **Report Only check box**.

5. Click **Done**.

6. When batch printing reports *Collated by Physician Location* or *Collated by Physician Group*, the Case report will be printed to the printer specified in the **Physician Fax Window** for the designated location.

7. Repeat from Step 1 for each of the Physician's print locations.

For Assign to All Cases Recipients

The **Assign to All Cases** function allows specific departments (Medical Records, Billing etc.) to receive a copy of every Case report when batch printing reports *Collated by Physician Location* or *Collated by Physician Group*.

Note: A print queue for each department's printer must be installed on every PC that will be printing reports *Collated by Physician Location* or *Collated by Physician Group*.

1. Click New on the **Physician List Window** to open the **Physician Window**.

2. In the **Name field**, type the name of the department to receive Case reports, for example, MEDICAL RECORDS.

3. Click the **Assign to All Cases check box**.

4. Click **Add** on the **Physician Window** to open the **Physician Fax Window**.

5. Type the location name in the **Location Code field**.

6. From the **Printer** drop-down menu, select the department's printer from the list.

7. Click **Done**.

8. When batch printing reports *Collated by Physician Location* or *Collated by Physician Group*, a copy of every Case report will be printed to the printer designated in the **Physician Fax Window** for each **Assign to All Cases** Physician.

Users

Click **Users** to add a new User to the library or to view, modify or delete an existing User. Click either **New** or **Open** from the **User List Window** (Figure 12) to open the **User Window** (Figure 13).

User List Window
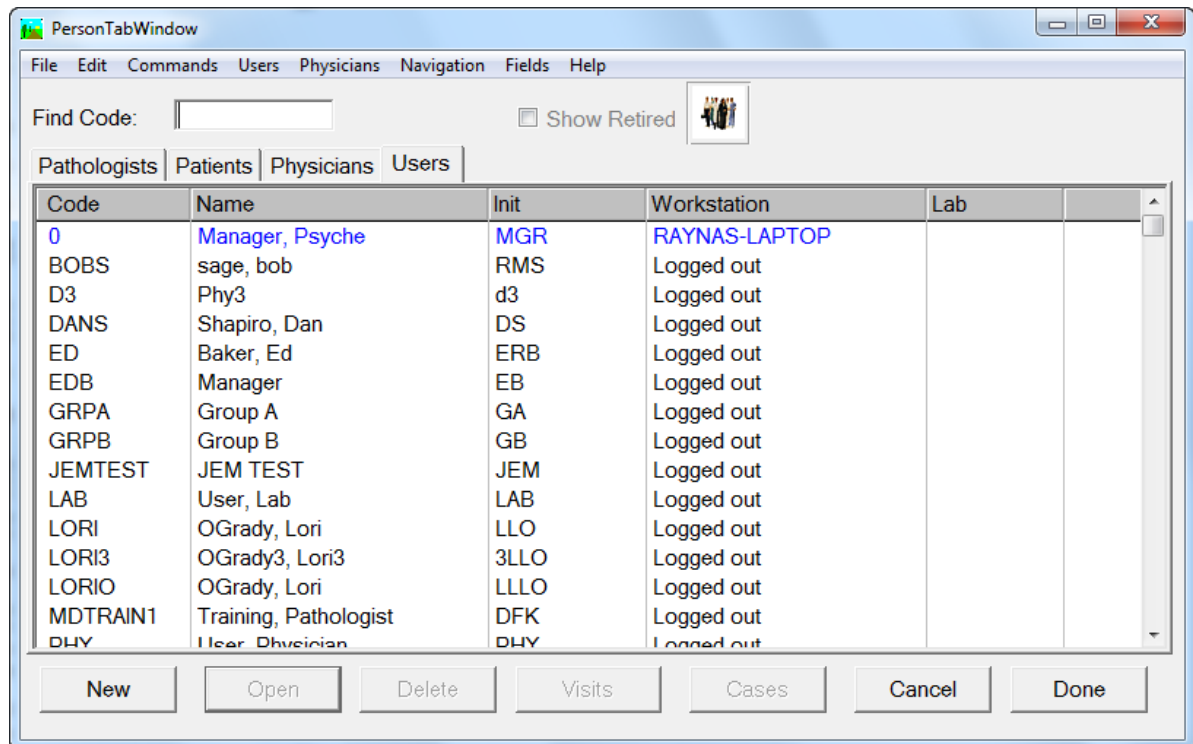
Figure 12 – **User List Window**

User List Window Columns

- **Code** – the unique identification code for the User.

- **Name** – the User's full name in the format *lastname, firstname*.

- **Init** – the User's initials. Used for tracking and audits. Should be unique.

- **Workstation** – the PC where the User is logged in.

- **Lab** – the site designation for the User, if the preference to use Site Security is enabled.

User List Window Menus

Users Menu

- *Broadcast Message* – opens a **User Message Window** where a text message may be entered. Type the message and click **Done**. The message will be sent to all Users currently logged in. The message is sent to the Users in an information box labeled with the code and name of the User who sent the message

- *Change Password* – opens a prompt to enter a new password.

- *Flag User logged out* – sets the selected User's Workstation flag to **Logged out**. This menu item is only available if the current User has *Manager* privileges.

- *Log User out* – logs the selected User out of **WindoPath**. This menu item is only available if the current User has *Manager* privileges.

- *Send Message* **–** opens a **User Message Window** where a text message may be entered. Type the message and click **Done**. The message will be sent to the User highlighted in the **User List Window**. The message is sent to the User in an information box labeled with the code and name of the User who sent the message.

User Window

Figure 13 – **User Window**

All personnel who are to use **WindoPath** must have a User account created in the **User Library**. Each User's work is identified as his or her own by the initials inserted into Case records. Each User account is assigned one or more security levels (privileges) that give access to certain functions.

User Window Fields

- **ID (required field) –** displays the unique identification code for the User. It can consist of alpha and/or numeric characters. This ID is entered when the User logs into **WindoPath**.

- **Name (required field) –** the User's full name in the format *lastname, firstname*.

- **Initials (required field) –** the User's initials that identify work performed in **WindoPath**. Initials must be unique for each User.

- **Password (required field) –** the User's password that is used when logging into **WindoPath**. The password must be at least 6 characters long and contain at least one numeric character.

- **Expires –** the date the User's login password expires. If the User attempts the log in to **WindoPath** after the password expiry date, a message will be

displayed indicating that the password has expired and the User will not be allowed to log in. The System Manager or other User with *Manager* privileges may then assign a new password to the User.

- **Pathologist >** – the User's associated Pathologist. This is required if the User is to sign out Cases. Enter a Pathologist by pressing **CTRL+L** in the **Pathologist field** and selecting a Pathologist from the library. If the selected Pathologist is flagged as a Signer, this User may sign out all Cases. If the selected Pathologist is flagged as a Cyto Signer, this User may sign out only normal Pap Cases. Pathologists must already have been entered in the **Pathologist Library** prior to entering them on User accounts. Only Users with *Manager* privileges can assign a Pathologist to a User account.

- **Physician >** – the User's associated Physician, if a User is to be restricted to viewing only Cases assigned to a specific Physician. Once a Physician has been assigned to any User account, this User may only view Cases assigned to that Physician. Enter a Physician by pressing **CTRL+L** in the **Physician field** and selecting a Physician from the library. Physicians must already have been entered in the **Physicians Library** prior to entering them on User accounts.

- **Practice >** – the group practice that this Physician belongs to. Press **CTRL+L** to display entries from the **Yellow Pages Library**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Auto Log Out Secs** – idle time in seconds that must pass before this User will be logged out of **WindoPath**.

- **Lab>** – if the preference to use Site Security is enabled, displays the User's site designation. Refer to the section entitled **Site Security** in *Chapter 15 – Preferences* for more information on site security. You can type free text in this field or press **CTRL+L** to display entries from the **Laboratory Definitions Library**.

- **Web Password -** the User's password for logging into the E-Reports web-based inquiry module (if installed).

- **Log In Attempts** – the number of unsuccessful log in attempts for this User name. When three unsuccessful logins are reached, the User account is flagged as Disabled and must be enabled by a Manager.

- **Max. Slides** – the maximum number of slides this User may screen per day. The number of slides screened is specified in the **Pap Case Window** – **Slides field**. When the maximum number is exceeded, the **Sign Out button** on the **Pap Case Window** will read **Max Slides**.

- **User Extra** – optional text field that can be used to store information about the User. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – User Fields Box**.

- **Label Printer** – allows you to specify what label printer will be used when this User prints labels.

- **Last Log In** – displays the last date and time the User logged into WindoPath.

User Window Action Buttons

- **Cancel** – closes the **User Window** without saving any changes.

- **Done** – closes the **User Window** saving any changes.

User Window Check Box

- **Disabled** – flags this User account as disabled. A User account may be manually disabled (or retired) by a Manager or automatically disabled if the specified number of Login Attempts are exceeded. When logging in, Disabled Users receive an **incorrect login** message. Disabled User accounts can be enabled by a Manager. To enable a Disabled account, click on this check box to remove the checkmark.

- **Psyche User** – for Psyche use only.

User Window Menu

User Menu

- *Additional Security* – opens the **Security Window** shown in Figure 14, where additional security features may be assigned to the User account.

- *Define Diff Keyboard* – for Clinical Processing Only, opens a window for the user to define Diff Keyboard Keys for counting. Please refer to the section entitled **Human Resources Set Up for Clinical Processing** in *Chapter 16 – WindoPath Clinical* for more information.

- *Copy Preferences from User* – opens the User List Window. You can highlight a User and click **Select** to copy that User's preference settings to the current User account.

- *Preferences/Privileges* – opens the **User Preferences List Window** shown in Figure 15.

- *Show Pathologist* – opens the **Pathologist Window** for the Pathologist associated with this User account.

- *Show Physician -* opens the **Physician Window** for the Physician associated with this User account.

Security Window

NOTE: Each item in each **Security Window** field must be separated by commas.

Security Window Fields

- **Valid Patient Locations** – Restricts this User from viewing Visits with certain Locations and any Cases on those Visits. All Locations that this User is authorized to view should be listed in this field. If this field is empty, this User is authorized to view all Visits.

- **Valid Security Codes** – Restricts the User to view only patients and visits who have those security codes associated with them. If specified here, only these codes may be viewed by the User.
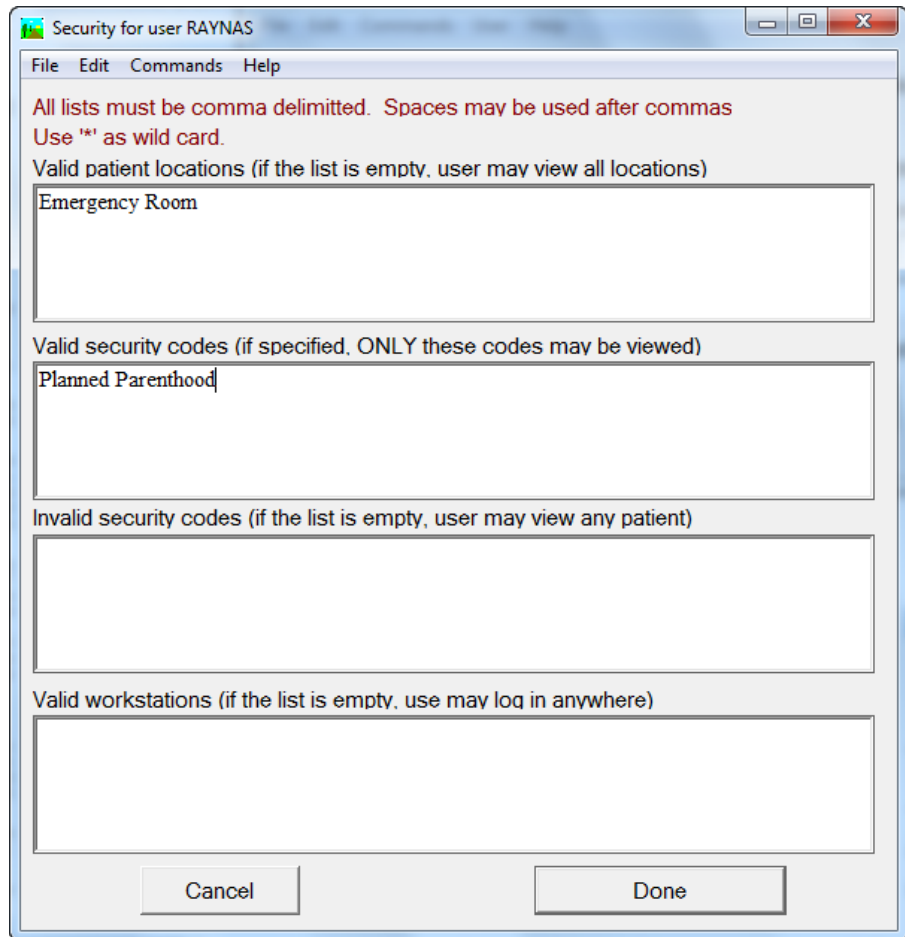
Figure 14 – **Security Window**

- **Invalid Security Codes** – Restricts this User from viewing Patients with certain Security Codes and any Visits and Cases on those Patients. All Security Codes that this User is NOT authorized to view should be listed in this field. If this field is empty, this User is authorized to view all Patients.

- **Valid Workstations** – Restricts this User from logging into **WindoPath** on certain workstations. All workstations (as defined in the **Workstation Library**) that this User is authorized to log in on should be listed in this field. If this field is empty, this User is authorized to log in on any workstation.

User Preferences List Window

Preferences in WindoPath can be defined per User (User preferences), per workstation (Local preferences) or system wide (Site Wide and Reserved preferences).

Each User's preferences are defined in the **User Preferences List Window**. User preferences are described in *Chapter 15 – Preferences*.
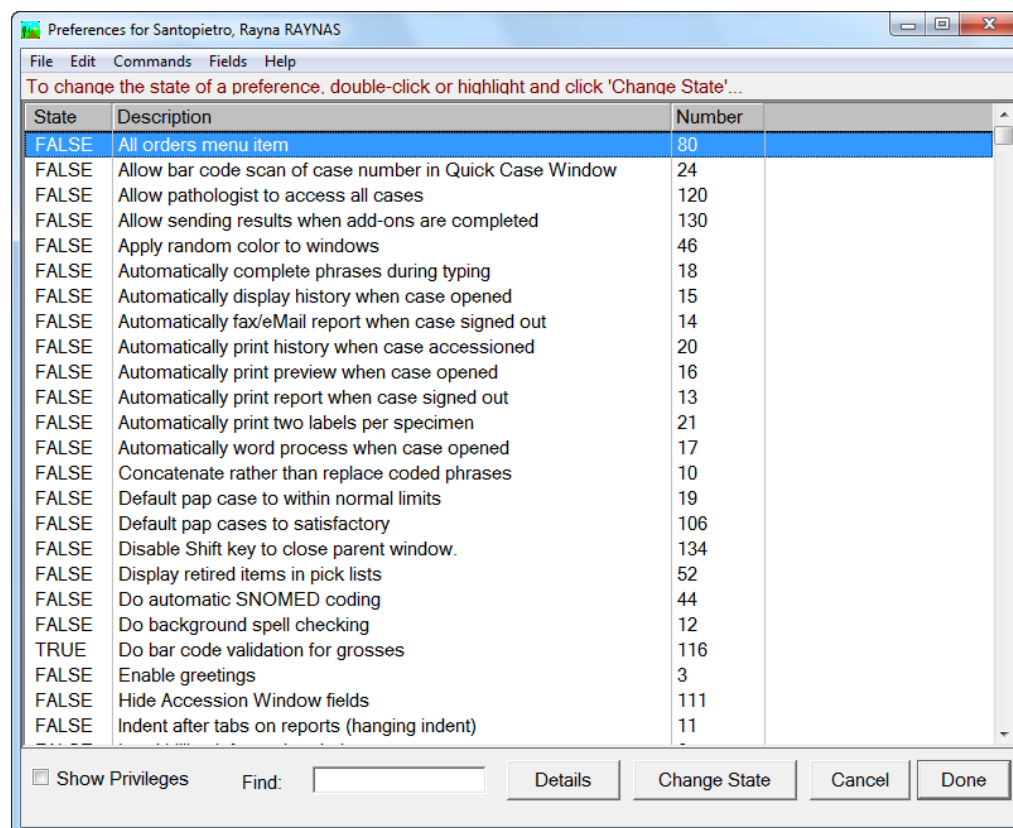
Figure 15 – **User Preferences List Window**

User Preferences List Window Find: field

The **Find: field** enables you to filter the **User Preferences List** based on entered criteria. For example, to filter the **User Preferences List** to all User preferences containing the word print, type PRINT in the **Find: field** and press **TAB**. The **User Preferences List** will be filtered to include only preferences containing the word print. To return to the full **User Preferences List**, delete all text from the **Find: field**.

User Preferences List Window Columns

- **State** – either **True** or **False**. The **True/False** setting of each preference can be changed by double-clicking on the State or by clicking **Change State**.

- **Description** – the name of the preference.

- **Number** – the code of the preference.

User Preferences List Window Action Buttons

- **Details** – opens a text window describing the highlighted preference and how it functions when set to **True** or **False**.

- **Change State** – changes the **True/False** setting of the highlighted preference.

- **Cancel** – closes the **User Preferences List Window**.

- **Done** - closes the **User Preferences List Window**.

User Preferences List Window Check Box

- **Show Privileges** – checking this box opens the **User Privileges List Window** (Figure 16).

User Privileges List Window

Click the **Privileges Check Box** on the **User Preferences List Window** to open the **User Privileges List Window** (Figure 16).

Each privilege is described in *Chapter 15 – Preferences*.
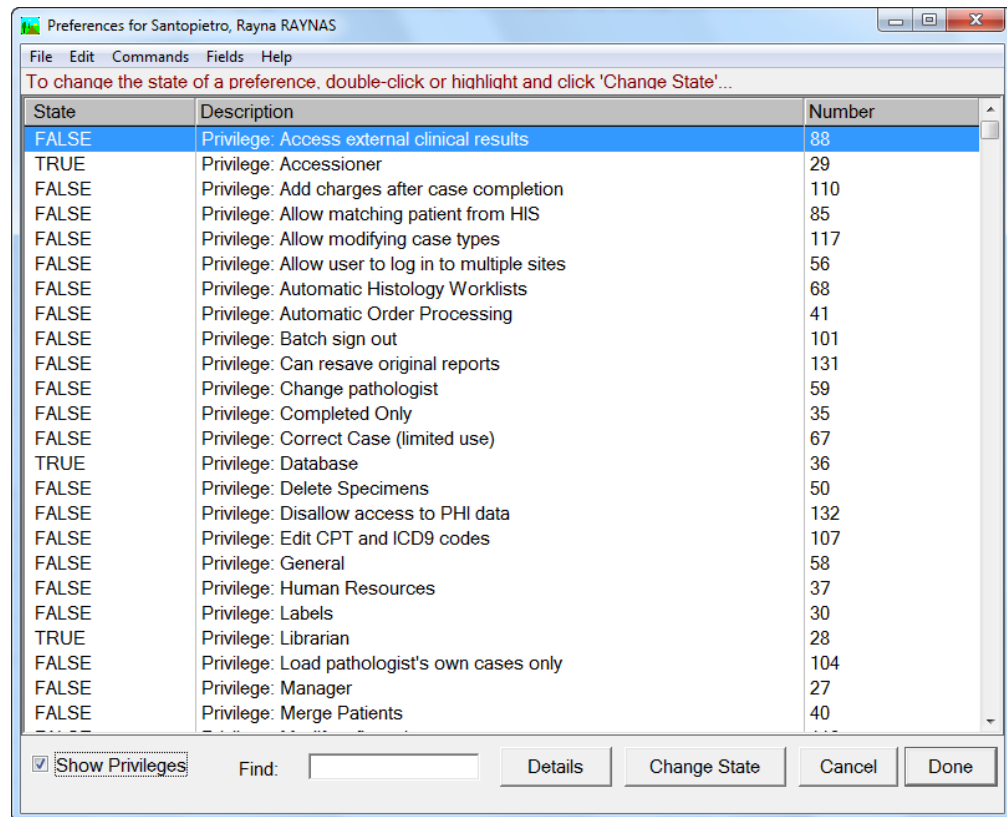
Figure 16 – **User Privileges List Window**

User Privileges List Window Columns

- **State** – either **True** or **False**. The **True**/**False** setting of each privilege can be changed by double-clicking on the State or by clicking **Change State**.

- **Description** – the name of the privilege.

- **Number** – the code of the privilege.

User Privileges List Window Action Buttons

- **Details** – opens a text window describing the highlighted privilege and how it functions when set to **True**.

- **Change State** – changes the **True**/**False** setting of the highlighted privilege.

- **Cancel** – closes the **User Privileges List Window**.

- **Done** – closes the **User Privileges List Window**.

User Privileges List Window Check Box

- **Show Privileges** – unchecking this box opens the **User Preferences List Window** (Figure 15).

Chapter 11 – The Library

Keyboard command *refers to* **CTRL+L***, entering the first few letters of the entry and pressing* **TAB***, entering* **#+CODE+CTRL+L** *or entering the code and pressing* **SHIFT+CTRL+L** *to retrieve an exact match library entry.*

The **Library** allows you to store commonly used information.

This information can be accessed when adding Patients and Visits, when creating Cases and when entering descriptions and Diagnoses. For most instances, the information is accessed using a keyboard command (**CTRL+L**).

Based on the data entry window and field in which you are working, the appropriate library will be accessed once the keyboard command is pressed. For example, if the User is in the **Source field**, the keyboard command will open the **Source Library** allowing for the selection of the appropriate entry.

This model reduces the risk of User input errors and helps to ensure that your data is consistent for the purposes of statistical reporting queries.

Library Window

The **Library Window** (Figure 1) is opened by clicking **Librarian** on the **Dispatcher Window** or by hitting **ALT+L.**

The Librarian displays several orange library books in the main **Library Window** but it also contains several other important libraries in the **Library Menu.**
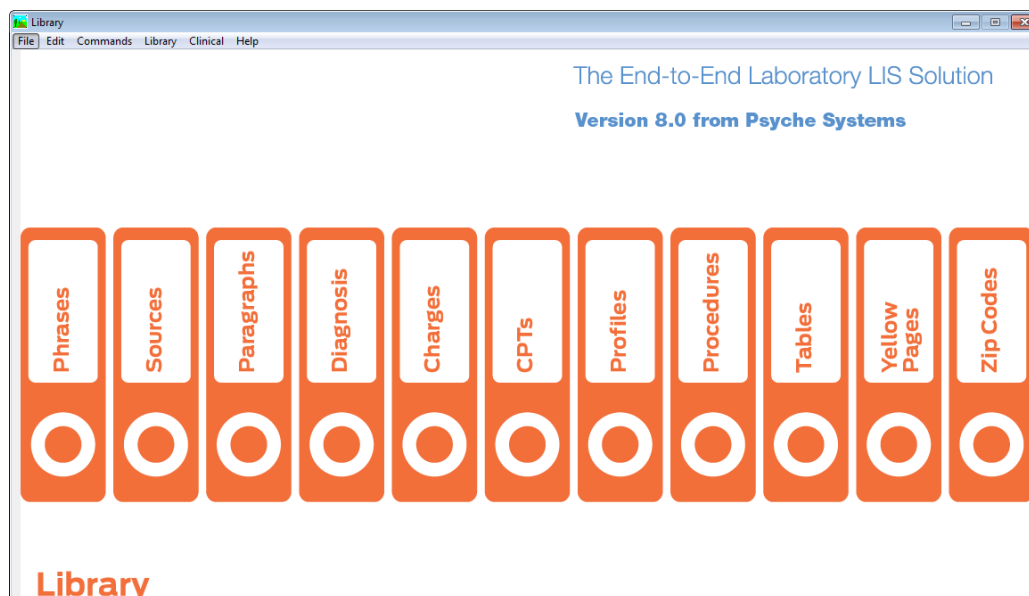
Figure 1 – **Library Window**

Library Books in the Library Window

- **Phrases –** a large collection of sub libraries (or boxes). They are used in various fields including comments, locations and Pap Diagnoses.

- **Sources –** Specimen sites and procedures.

- **Paragraphs –** descriptive paragraphs used in entering text such as gross description, microscopic description, notes and supplemental reports.

- **Diagnosis –** these are the Diagnosis definitions.

- **Charges –** billing and CAP workload codes.

- **CPTs –** these are the CPT codes for billing purposes.

- **Profiles** – panels of procedures (tests) used in histology, cytology and instrument interfaces.

- **Procedures –** procedures (tests) used in histology, cytology and instrument interfaces.

- **Tables –** predefined table templates which can be added to the Gross, Micro or Diagnosis tabs of the QCW.

- **Yellow Pages** – the names and addresses of consult hospitals and insurance companies.

- **ZIP Codes** – city, state, county and Zip codes used for entry in the patient tab of the Accessioning window.

Libraries in the Library Menu

- **Case Types** – opens the **Case Types List Window**.

- **ICD Codes** – opens the **ICD9 Code List Window**.

- **Drugs** – opens the **Drugs List Window.**

- **Inventory** – opens the **Inventory List Window.**

- **Inventory Definitions** – opens the **Inventory Definition List Window.**

- **Laboratory Definitions** – opens the **Laboratory Definition List Window.**

- **LOINC Codes –** opens the **LOINC Code List Window.**

- **Physician Panels** – opens the **Physician Panels List Window.**

- **QC Controls** – opens the **QC Controls List Window.**

- **Rack Definitions** – opens the **Rack Definition List Window.**

- **Reflex Rules** – opens the **Reflex Test List Window**.

- **Report Groups** – opens the **Report Groups List Window.**

- **Scheduled Reports** – opens the **Scheduled Reports List Window**.

- **SNOMED Codes** – opens the **SNOMED Code Definition List Window**.

- **Super Panels** – opens the **Super Panels List Window.**

- **Vials** – opens the **Vials List Window.**

- **Workstations** – opens the **Workstation List Window**.

- **Import ICD9 Codes** – opens the ICD Code Migration Assistant Import Window which allows a file of ICD codes to be imported into the **ICD Code Library**. Used in conjunction with the **ICD Code Migration Assistant** module.

- **ICD Code Migration Assistant** – opens the **ICD Code Migration Assistant Window.** This feature will only be available if you have purchased the **ICD Code Migration Assistant** module.

Libraries in the Clinical Menu

- **Clinical Test Codes** – opens the **Clinical Test Codes List Window.**

- **Clinical Profiles** – not used.

- **Ordering Profiles** – not used.

- **ICD Profiles** – not used.

Library List Windows

When you open any of the libraries in the **Librarian**, the appropriate **List Window** opens which allows you to perform various tasks within each library.

Library List Window Find: field

When you open a library, the focus of the **Find field** is the first column in the library; usually the Code column. If you right click on a column heading, the column is alphabetized in ascending order and the focus of the **Find field** changes to that column.

To find a library entry by code, right click in the Code column heading and type the code (or partial code) in the **Find Code field**. To find a library entry by text, right click in the Text column heading and type the text (or partial text) in the **Find Text field**.

Library List Window Action Buttons

- **New** – opens an appropriate blank window to add a new item to the library.

- **Open** – opens the window for the currently highlighted item.

- **Delete** – deletes the currently highlighted item after you respond **Yes** to the prompt **Are you sure you want to delete**. If the item is tied to a case or to an entry in another library, you will be unable to delete the item.

- **Done** – closes the current **List Window**.

Double-clicking an item in a **List Window** opens the window for that item.

Library List Window Check Box

- **Show Retired** – by default, retired library entries are not displayed in the list box. To display retired entries, click this check box. Retired entries are displayed in red.

Phrases Library

Click **Phrases** to open the **Coded Phrase List Window** (Figure 2), which allows you to add, delete or view stored phrases. These phrases are short coded descriptions for specific data fields throughout **WindoPath** and are easily accessed with minimal keystrokes. Each **Box Library** represents a sub library for a specific data field in WindoPath. Adding a stored phrase to a specific **Box Library** requires the User to enter a unique **Code** for each phrase and to select the appropriate **Box Library** to which the phrase will be added.

Storing phrases in the **Phrases Library** greatly decreases the amount of typing that must be done when entering Patient and Case data.
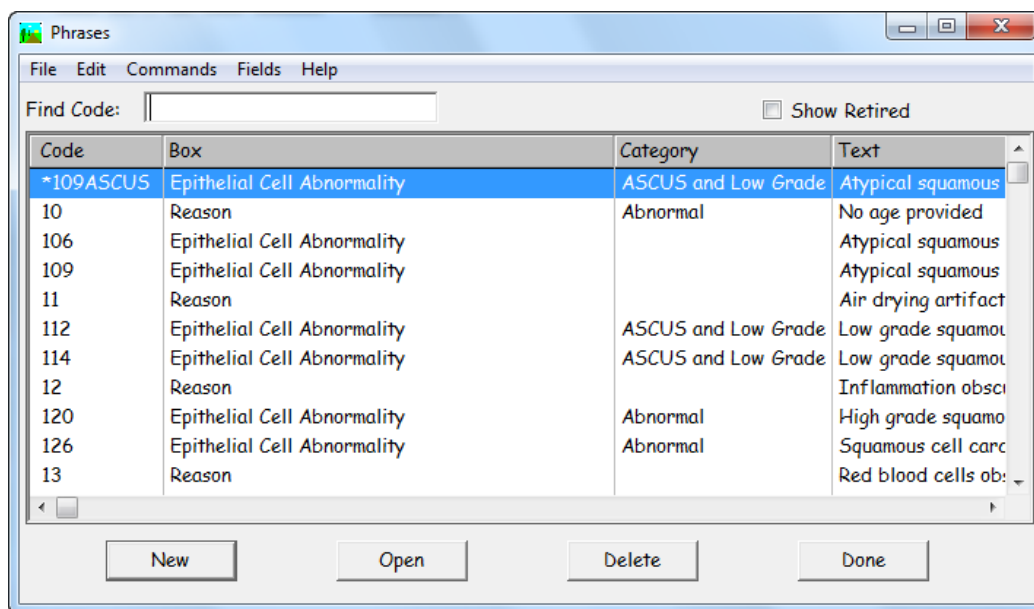
Figure 2 – **Coded Phrase List Window**

The **Coded Phrase List Window** columns include **Code, Box, Category and Text.**

The **List Box** will sort alphabetically by **Code** by default. It is much easier to perform tasks in this list box by sorting the window by **Box Library.** Right click the **Box** Column heading to sort the list box by **Box Library.** Now, you can easily see each **Box Type** (**Box Column**) and each of the stored coded phrases (**Text Column**) included in that **Box Library**

To add a phrase to a specific **Box Library**, click **New** on the **Coded Phrase List Window** to open the **Coded Phrase Window** (Figure 2).

Select which **Box Library** you wish to add the coded phrase to in the **Box Name** field and select the box for which you would like to add a new phrase.

Type the unique code for the phrase in the **Code field**. Type the text of the phrase in the **Phrase field**. Click **Done** to close the **Coded Phrase Window** saving any changes.

To delete an existing phrase, highlight the phrase in the **Coded Phrase List Window** and click **Delete**. To modify an existing phrase, highlight the phrase in the **Coded Phrase List Window** and click **Open**. Edit the phrase in the **Phrase field**. Click **Done** to close the **Coded Phrase Window** saving any changes.

Coded Phrase Window

Figure 3 – **Coded Phrase Window**

Coded Phrase Window Fields

- **Code** – the User-defined code for the phrase.

- **Box Name** – the **Box Library** (sub library) associated with the phrase. Click the drop-down menu to display the list of available Box Names. Pressing **CTRL+L** in any field or tab accessing the **Phrases Library** (example: Comment) displays the list of phrases associated with the appropriate **Box Library**. Refer to the **Phrases Library Box Chart** for a complete list of fields and tabs in **WindoPath** that access the **Phrases Library**.

- **Phrase** – the User-defined text for the phrase.

- **Additional** – not used.

- **Voice** – the User-defined code for the phrase for use with the Vox Pap data entry module (if installed).

- **Diagnosis Codes** – for Pap Diagnoses, the Diagnosis codes that apply to this Diagnosis. Multiple codes may be entered, separated by commas.

- **SNOMED Codes** – for Pap Diagnoses, the SNOMED code(s) to be automatically entered on the Case when this phrase is selected as the Diagnosis.

- **ICD Codes** – for Pap Diagnoses and Prostate Diagnoses, the ICD code(s) to be automatically entered on the Case when this phrase is selected as the Diagnosis. Press **CTRL+L** to display entries from the **ICD Library**. To select a library entry, highlight it and click **Select** or press **ENTER.**

- **Severity** – for Pap Diagnoses, the severity level that applies to this Diagnosis. Press **CTRL+L** to display entries from the **Phrases Library – Severity Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Rule Out Information (Profile)** – **Profile** to be added to a **Specimen** to rule out a specific condition.

- **Rule Out Information (Prefixes)** – the prefixes of the **Case Types** which can use this **Rule Out**. Multiple codes may be entered separated by commas.

- **Category** – they are created as phrase entries (Box Name – Category) and then assigned to pap diagnoses for the purpose of Ad Hoc Reflex rules.

Coded Phrase Window Check Boxes

- **Retired** – click this check box to retire and entry. By default, retired library entries are not displayed in the list box. To display retired entries, click this check box. Retired entries are displayed in red.

- **Malignant Diagnosis** – for pap diagnoses, when you chose a diagnosis from the phrases library, the malignant flag will go with the entry. Thus, marking the specimen as having a malignant diagnosis. Prostate diagnoses can be pulled from this library or free texted. If the prostate diagnosis is pulled from this library and the malignant check box is checked, the specimen will be marked as malignant.

Phrases Library Box Chart

The following chart lists the windows and fields in **WindoPath** that access the **Phrases Library**. Press **CTRL+L** in the listed field or select the listed menu item to display entries from the listed Box Name.

Box Name	Accessed From	How To Get There
Add-on	**Workload Definition Window** – Add-on Phrase field	**Librarian** – Charges
Additional Data	**Coded Phrase Window** – Additional field	**Librarian** – Phrases
Audit Field Name	**Log Audit Window** – Field Name field	**Pap Case Window** – *Other Menu* – *Log to Audit Trail*
		Dispatcher Window – *Dispatcher Menu* – *Log to Audit*
Clinical Information	**Quick Case Window** – C Info tab	
Comment	**Quick Case Window** – C Com / S Com tabs	
Company Type	**Yellow Pages Window** – Type field	**Librarian** – Yellow Pages
Consult Type	**Consult Window** – Type field	**Quick Case Window** – Consult Check Box
		Pap Case Window – Consult Check Box
Credit	**Workload Definition Window** – Person to Credit field	**Librarian** – Charges
Degree	**Physician Window** – Degrees field	**Human Resources** – Physicians
Extra One	**Accession Window** – Extra Visit #1 field	**Accession Window** – Visit tab
Extra Text	**Accession Window** – Extra Text field (next to Source)	**Accession Window** – Specimen tab
Extra Two	**Accession Window** – Extra Visit #2 field	**Accession Window** – Visit tab
Identifier	**Add-on Window** – Identifier field	**Quick Case Window** – *Add-on button* – *Identifier field*
Instrument	**Profile Window** – Instrument field	**Librarian** - Profiles
Insurance Balance Type	**Insurance Window** – Balance Type field	**Accession Window** – *Visit Menu* – **Billing** – **New button**
Insurance Priority	**Insurance Window** – Priority field	**Accession Window** – *Visit Menu* – **Billing** – **New button**
Insured By	**Accession Window** – Insured By field	**Accession Window** – Patient tab
	Patient Window – Insured By field	**Human Resources** – Patients
Keywords	**Quick Case Window**	**Quick Case Window** – *Reporting Menu* – **Highlight Keywords**
Last Period	**Accession Window** – LstMP field	**Accession Window** – Case tab
	Pap Case Window – LMP field	
Location	**Accession Window** – Location field	**Accession Window** – Visit tab
	Visit Window – Location field	**Human Resources** – Patients – Visits
Marital Status	**Billing Window** – Marital Status field	**Accession Window** – *Visit Menu* – **Billing**
Miscellaneous	**Quick Case Window** – underscores	**Quick Case Window** – press **CTRL+L** in any underscore in text
Order Priority	N/A	Used only by the WindoPath Outreach program

Organisms	**Pap Case Window – Organ button**	
Pap Diagnosis	**Pap Case Window –** Diagnosis box	
Patient Type	**Accession Window –** Type field	**Accession Window** – Visit tab
	Visit Window – Type field	**Human Resources** – Patients – Visits
Pickup Message	**Clinical Specimen and Determination List Window**	**Accession Window** – *Clinical Specimen Menu – Clinical Data*
Procedure	**Source Definition Window** – Procedure field	**Librarian** – Sources
Procedure Comment	**Procedure Window –** Comment field	**Procedure List Window** – *Procedures Menu – Edit Procedure*
Procedure Slide Label	**Procedure Window –** Slide Label field	**Librarian –** Procedures
Profile Comment	**Profile Window** – Internal Comment field	**Procedure List Window** – *Profiles Menu – Edit Profile*
	Procedure Window – Internal Comment field	**Procedure List Window** – *Procedures Menu – Edit Procedure*
Profile Designation	**Procedure List Window** – Designation field	
Profile Instructions	**Profile Window –** Instructions field	**Procedure List Window** – *Profiles Menu – Edit Profile*
	Procedure Window – Instructions field	**Procedure List Window** – *Procedures Menu – Edit Procedure*
Profile Status	**Procedure Window –** Status field	**Procedure List Window** – *Procedures Menu – Edit Procedure*
QA Reason	**Procedure Window –** Reason field	**Procedure List Window** – *Procedures Menu – Edit Procedure*
Reason	**Pap Case Window –** Reason field	
Recommendations	**Pap Case Window – Recom button**	
Relation	**Insurance Window –** Relation field	**Accession Window –** *Visit Menu – **Billing** – **New button***
Schedule	**Physician Window** – Fee Sched field	**Human Resources** – Physicians
	Fee Window – Schedule field	**Librarian -** Charges – **Add button**
Security Code	**Accession Window –** Secur. field	**Accession Window** – Patient tab
	Patient Window – Security Code field	**Human Resources –** Patients
Severity	**Coded Phrase Window –** Severity field	**Librarian –** Phrases
Sex	**Accession Window** – Sex field	**Accession Window** – Patient tab
	Patient Window – Sex field	**Human Resources –** Patients
Sign Out Location	**Quick Case Window**	**Quick Case Window** – *Modify Menu – **Sign Out Location***
	Pap Case Window	**Pap Case Window** – *Case Menu – **Sign Out Location***
Source Category	**Source Definition Window** – Category field	**Librarian** – Sources
Special Flag	**Quick Case Window –** Special Flag menu	**Quick Case Window** – *Modify Menu – **Flag Special***

Specialty	**Physician Window –** Specialty field	**Human Resources –** Physicians
Specimen Clinical Information	**Quick Case Window –** S Info tab	
State	N/A	Used only by the WindoPath Outreach program
Status	**Accession Window –** C. Status field	**Accession Window –** Case tab
Title	**Pathologist Window –** Title field	**Human Resources –** Pathologists
User Fields	**Accession Window –** User1-3 fields	**Accession Window –** all tabs
Work Group	**Procedure Window –** Work Group field	**Procedure List Window –** *Procedures Menu –* ***Edit Procedure***
Pap Category #1	**Pap Case Window** – Pap Category #1 Check Box	
Pap Category #2	**Pap Case Window** – Pap Category #2 Check Box	
Pap Category #3	**Pap Case Window** – Pap Category #3 Check Box	
Pap Category #4	**Pap Case Window** – Pap Category #4 Check Box	
Pap Category #5	**Pap Case Window** – Pap Category #5 Check Box	
Pap Category #6	**Pap Case Window** – Pap Category #6 Check Box	

*Box Names are User-defined in Preferences

There are six User-Defined **Pap Category Boxes.** The phrases may be defined for each of the six Pap Categories on the **Pap Case Window**. The first of these categories is reserved for normal Pap Diagnoses, the second is optionally reserved for normal **or** abnormal Pap Diagnoses and the remaining four are reserved for abnormal Diagnoses. The name of each category is User-defined. You should inform your Application Specialist of how you would like each category to be labeled and decide whether or not the second Pap Category will be defined as a normal or abnormal result.

Source Library

The **Source Library** stores all Specimen Sources and procedures. Each Source consists of a specific site and procedure combination. Sources are accessed by pressing **CTRL+L** in the **Source field** of the **Accession Window-Specimen tab**.

Source Definition Window

Click the **Source Library** to open the **Source List Window**. Click **New** or **Open** to open the **Source Definition Window** (Figure 4). Click the **More button** to open the extended **Source Definition Window** (Figure 5).

Figure 4 – **Source Definition Window**

Figure 5 – **Source Definition Window Extension**

Source Definition Window Fields

- **Code** – the User-defined code for the Source. This code must be unique.

- **Site** – the site location of the Specimen. Example: Lung.

- **Procedure** – the procedure used to obtain the Specimen. Example: Biopsy.

- **Gross –** if you want a specific canned gross description to be entered on every Specimen with this Source, click the drop-down menu to display entries from the **Paragraphs Library** and select the appropriate gross description. When a Specimen with this source is saved in the **Accession Window**, the selected gross description is automatically entered on the Specimen.

- **Profile Type>** – If you want the Source to automatically generate profiles, press **CTRL+L** to display the **Profiles Library** and select the appropriate profile. Click **Add** to add the profile type to the list box. Repeat for each additional profile you wish to associate with the Source. Each time the Source is entered for a Specimen, the associated profiles are added to the Specimen.

- **Charge Code>** – If you want the Source to automatically generate charges, press **CTRL+L** to display the **Charges Library** and select the appropriate charge code. If you want this charge to be added more than once, enter the appropriate number in the numeric field. Click **Add** to add the charge code to the list box. Repeat for each additional charge code you wish to associate with the Source. Each time this Source is entered on a Specimen, the associated charge code is added as a Specimen charge.

- **Diagnosis** – If you want a specific canned Diagnosis to be entered on every Specimen with this Source, click the drop-down menu to display entries from the **Diagnosis Library** and select the appropriate Diagnosis definition. When a Specimen with this source is saved in the **Accession Window**, the selected Diagnosis is automatically entered on the Specimen.

- **Modifier –** if you want a specific canned Source Modifier to be entered on every Specimen with this Source, enter text in this field.

- **Category –** optional User-defined category for the Source. You may type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Source Category Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Image File** – If you want a specific image to be entered on every Specimen with this Source, type **CTRL+L** in this field and navigate to the appropriate image file. When a Specimen with this source is saved in the **Accession Window**, the selected image is automatically entered on the Specimen.

- **T Codes** – up to three T codes associated with the Source. Each time this Source is entered on a Specimen, the T codes are stored in the Specimen Table – SNOMED Code field. This data can be used for management reporting.

- **Next Source –** if you want a specific source to always be ordered as the next specimen that is accessioned on this source, hit **CTRL+ L** to select a source from the Sources Library.

- **Appropriate Sex** – the appropriate Patient sex for this Source. When a Specimen with this Source is saved in the **Accession Window**, if the

Patient's sex does not match the appropriate sex for the Source, the User is notified and may either proceed with the accession or abort the operation.

- **Special Flag** – if you want a specific Special Flag to be added by default on every Specimen with this Source, select a Special Flag from the drop-down menu.

- **# of Labels** – the number of Specimen labels to be ordered on Cases with this Source. When a Specimen with this source is saved in the **Accession Window**, the selected number of labels is automatically entered in the **Labels tab**.

- **ICD9 decimal** – if an ICD9 Code is added to any Diagnosis on any Specimen with this Source definition, the numeral in this field will be added to the ICD9 code after a decimal point. If the ICD9 code selected already includes a decimal, the code in this field will be ignored.

- **Review Percent** – if you want a specific percentage of Cases with this Source to be automatically flagged for review, enter the percentage in this field. (The default entry of –1 indicates that no percentage has been set for this Source.) When Cases are signed out, if the Case has one or more Specimens with this Source, the specified percentage of these Cases will be automatically flagged for review. If no Review Percent has been set for a specific Source, **WindoPath** will use the review percentage set for the Case type (if any).

- **X Label Position** – default x-coordinate for the specimen marker on the default Image File.

- **Y Label Position** – default y-coordinate for the specimen marker on the default Image File.

- **Default Microscopic** – if you want a specific canned microscopic description to be entered on every Specimen with this Source, click the drop-down menu to display entries from the **Paragraphs Library** and select the appropriate microscopic description. When a Specimen with this source is saved in the **Accession Window**, the selected microscopic description is automatically entered on the Specimen.

- **Default Diagnosis** – if you want a specific canned diagnosis description to be entered on every Specimen with this Source, click the drop-down menu to display entries from the **Diagnosis Library** and select the appropriate diagnosis description. When a Specimen with this source is saved in the **Accession Window**, the selected diagnosis description is automatically entered on the Specimen.

- **Default Case Comment** – if you want a specific canned Case comment to be entered on every Specimen with this Source, click the drop-down menu to display entries from the **Phrases Library – Comment box** and select the appropriate comment. When a Specimen with this source is saved in the **Accession Window**, the selected Case comment is automatically entered on the Case.

- **Default Table** – if you want a specific table to be entered on every Specimen with this Source, click the drop-down menu to display entries from the **Tables Library** and select the appropriate table. When a Specimen with this source is saved in the **Accession Window**, the selected table is automatically entered on the Specimen.

Source Definition Window List Boxes

- **Profile Type** – lists all profiles to be automatically ordered on the Source. To add a profile type to the list, press **CTRL+L** in the **Profile Type field** to display entries from the **Profiles Library**. Highlight the desired entry and click **Select** or press **ENTER**. The selected profile type is displayed in the **Profile Type field**. Click **Add** to add the selected profile type to the **Profile Type List**. To specify a profile designation, count or number of pieces for a profile type, double click on the profile type in the **Profile Type List** and enter the appropriate data. To flag a profile as a Reflex test, highlight the profile in the **Profile Type List** and click the **Reflex button**. The Reflex flag on the profile will be set to **True**. When a profile is flagged as a Reflex test, the profile is not added when the Specimen is saved. Instead, the profile is ordered when a malignant diagnosis is entered on a Specimen with this Source. To delete a profile type from the list, highlight the profile type and click **Delete**.

- **Charge Code** – lists all charges to be automatically applied to the Source. To add a charge code to the list, press **CTRL+L** in the **Charge Code field** to display entries from the **Charges Library**. Highlight the desired entry and click **Select** or press **ENTER**. The selected charge code is displayed in the **Charge Code field**. Click **Add** to add the selected charge code to the **Charge Code List**. To delete a charge code from the list, highlight the charge code and click **Delete**.

- **Diagnosis Code** – lists all Diagnosis definitions to be displayed in the **Diagnosis List** when using **CTRL+L** in the **Diagnosis tab** of the **Quick Case Window** on Specimens with this Source. To add a Diagnosis definition to the list, click **Add** to display entries from the **Diagnosis Library**. Highlight one or more Diagnosis definitions and click **Select** or press **ENTER**. The selected Diagnosis definition(s) are displayed in the **Diagnosis Code List**. To delete a Diagnosis from the list, highlight the Diagnosis and click **Delete**.

Source Definition Window Action Buttons

- **Add** – adds the profile, charge or Diagnosis in the **Profile Type, Charge Code** or **Diagnosis Definition** fields to the **Profile Type List**, **Charge Code List** or **Diagnosis Code List**.

- **Delete** – deletes the highlighted profile, charge or Diagnosis in the **Profile Type, Charge Code** or **Diagnosis Code List**.

- **New** – opens the **Profile Definition Window** or the **Workload Definition Window**, allowing new codes to be added to the library.

- **Reflex** – toggles the Reflex flag of the profile highlighted in the **Profile Type List** from **True** to **False** or from **False** to **True**.

- **Previous** – opens the previous Source definition in the **Source Definition List**.

- **Next** – opens the next Source definition in the **Source Definition List**.

- **Save** – saves changes to an existing Source. Saves a new Source definition to the database and enables the **Add button** for the **Diagnosis Code List**.

- **Cancel** – closes the **Source Definition Window** without saving any changes.

- **Done** – closes the **Source Definition Window** saving any changes.

Source Definition Window Check Boxes

- **Retired –** check this box to flag this Source as inactive. This Source will not appear in the **Source List** when pressing **CTRL+L** in any field that accesses the **Source Library**.

- **Microbiology –** flag source as **Microbiology**.

- **Print with Diagnosis** – the source will print in the Diagnosis Section of the report for this specimen.

- **Suppress Dash –** check this box to not print the dash that appears after the Specimen Site in the Source section on reports. If this Source definition has a Site in the Site field but no Procedure in the Procedure field, the dash that usually prints between the Site and Procedure will not be printed.

- **No Reflex for Malignant Diagnosis** – not used.

Source Definition Window Radio Buttons

- **Correlation [Gyn, Non-Gyn, Prostate, None]** – for Query Cytology management reporting. If you want the Source to correlate with Paps (Gyn cytology), check the **Gyn** box. The Source will automatically be associated with Gyn cytology (Pap) Cases when you run management report queries which use the correlation. If you want the Source to correlate with Non-Gyn cytology, check the **Non-Gyn** box. The Source will automatically be associated with Non Gyn cytology Cases when you run management report queries which use the correlation. If you want the Source to correlate with Prostate cytology, check the **Prostate** box.   If you do not want the Source to correlate with either **Gyn** or **Non-Gyn** cytology, check the **None** box.

Source Definition Window Menu

Source Definition Menu

- **Add Profile** – adds the profile in the **Profile Type field** to the **Profile Type List**. Use in place of clicking the **Add button** under the **Profile Type field**.

- **Add Workload Definition** – adds the charge in the **Charge Code field** to the **Charge Code List**. Use in place of clicking the **Add button** under the **Charge Code field**.

Paragraphs Library

The **Paragraphs Library** stores canned paragraphs to be used when entering text such as gross and microscopic descriptions, notes and consults. Canned paragraphs are accessed by pressing **CTRL+L** in text boxes.

Click the **Paragraphs Library** to open the **Paragraphs List Window**. Click **New** or **Open** to open the **Paragraph Definition Window** (Figure 6).

Paragraph Definition Window
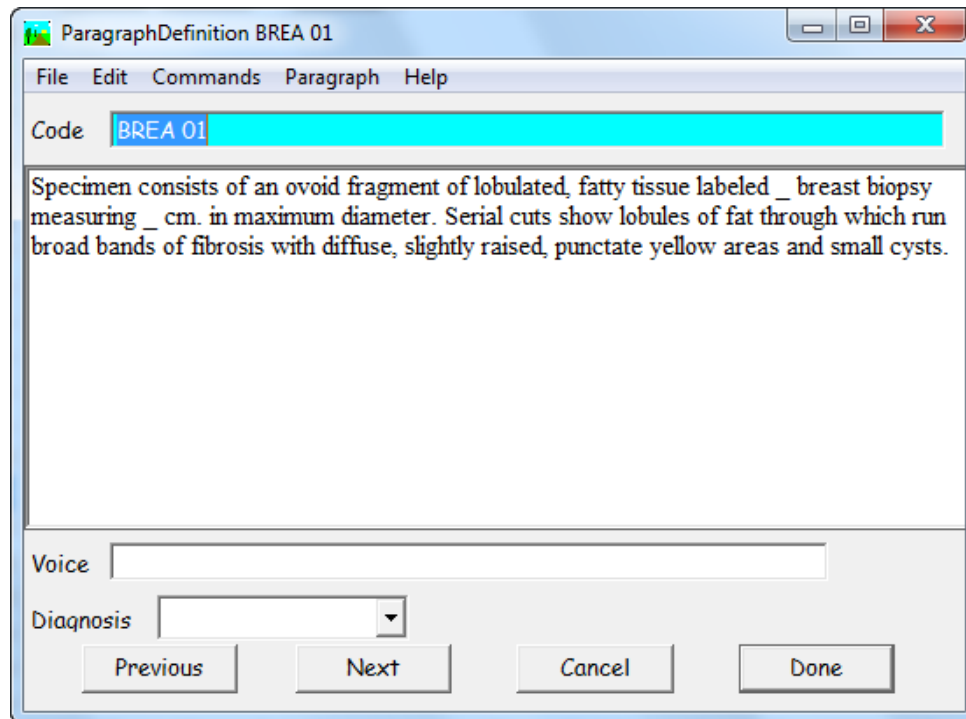
Figure 6 – **Paragraph Definition Window**

Paragraph Definition Window Fields

- **Code** – the User-defined code for the paragraph. This code must be unique within the **Paragraph Library**.

- **Definition Text Box** - the full text of the paragraph.

- **Voice** – the User-defined code for the paragraph for use with the Vox Pap data entry module (if installed).

- **Diagnosis** – allows association of a Diagnosis definition with a paragraph definition. When this paragraph is selected on a Specimen in the **Quick Case Window** (for example, in the **Gross tab**), the User is prompted to add the associated Diagnosis definition as the Diagnosis on the Specimen. Click the drop-down menu to display entries from the **Diagnosis Library**. Click on an entry to select it. The Diagnosis definition will be displayed in the **Diagnosis field**. To delete a Diagnosis definition, highlight the text in the **Diagnosis field** and delete it.

Creating Canned Paragraphs Containing Variable Data

Fill in the Blanks Feature

You can incorporate blanks in canned paragraphs for data that is variable from Case to Case. These blanks are filled in with minimal keystrokes.

To create a canned paragraph with *fill-in-blanks*, enter an underscore (_) where the variable data is to be entered later.

Whether the fill-in-blank field is intended for 1 character or 1 full sentence, only 1 underscore (_) is necessary for each blank. Be sure to hit the space bar on your keyboard before and after each underscore. Otherwise, whatever is next to the underscore will become highlighted and deleted when you type the variable data. The only exception to the space after the underscore is if it comes directly before the ending punctuation of the sentence. In this case, you do not have to put a space after the underscore.

Incorrect Fill-in Blank Fields:

Specimen consists of _____.

Specimen consists of _ .

Specimen consists of _cc of fluid.

Dr. _ :

The piece of tissue measures _x_x_cm.

Correct Fill-in Blank Fields:

Specimen consists of _.

Specimen consists of _ cc of fluid.

Dr. _:

The piece of tissue measures _ x _ x _ cm.

To quickly access these blanks after having selected the paragraph in the **Quick Case Window**, press **CTRL+I** to move the cursor to the first blank. Insert the variable data, then press **CTRL+I** to move to the next blank. Repeat these steps until all the blanks have been filled.

Insert Fields Feature

You can incorporate insert fields in canned paragraphs for data that is variable from Case to Case. These blanks are filled in automatically by WindoPath.

To create a canned paragraph with *insert fields*, select **Insert Field** from the **Paragraph Menu** or hit **ALT+I** to open the **Report Field Selection Window**.

The **Report Field Selection Window** in the **Report Fields List Box** displays all of the fields throughout WindoPath. Select the field you wish to add to the canned paragraph by double clicking on it.

For example, the specimen number insert field, <Specimen.number>, will display the current specimen number for the specimen you are adding the paragraph to.

<Specimen.number>The specimen is received in formalin consists _ cc of hemorrhagic material.

Displays as:

A. The specimen is received in formalin consists _ cc of hemorrhagic material.

The case number insert field, <Case.number>, will display the case number. The patient name insert field, <Patient.name>, will display the patient name.

Dear Dr. _:

Enclosed please find case <case.number> for patient <Patient.name>.

Displays as:

Dear Dr. _:

Enclosed please find case S2014-001529 for patient James Doe.

Diagnosis Library

The **Diagnosis Library** stores Diagnoses and their associated Diagnosis Codes, SNOMED Codes, ICD Codes, Default Microscopic Description, Default Tables and Default Images. A stored Diagnosis may be marked to **Apply to all Sources** or to **Apply to all Procedures.** A stored Diagnosis may be marked as **Malignant**.

Click the **Diagnosis Library** to open the **Diagnosis List Window**. Click **New** or **Open** to open the **Diagnosis Definition Window** (Figure 7).

Diagnosis Definition Window

Figure 7 – **Diagnosis Definition Window**

Diagnosis Definition Window Fields

- **Code** – the User-defined code for the Diagnosis. This code must be unique.
- **Description Box** – the full text of the Diagnosis.

- **Diagnosis Note** – the default Diagnosis Note associated with the Diagnosis will populate into the **D Note** tab every time this canned diagnoses is used for a specimen.

- **Diagnosis Code** – a severity level code associated with the Diagnosis. The Diagnosis Code can be preceded by a number to signify the degree of severity. For example, 1 denotes a normal Diagnosis (1WNL) while 6 denotes a severely abnormal Diagnosis (6CAR). These Diagnosis Codes can be correlated with Gyn or Non-Gyn cytology Diagnoses. The discrepancy level between the two Diagnoses is calculated when the Gyncorr.bqy or Ngyncorr.bqy management reports are run.

- **Micro** – if you want a specific canned microscopic description to be entered on every Specimen with this Diagnosis, click the drop-down menu to display entries from the **Paragraphs Library** and select the appropriate microscopic description. When a Diagnosis with this Diagnosis definition is saved in the **Quick Case Window**, the selected microscopic description is automatically entered on the Specimen.

- **SNOMEDs** – up to three SNOMED codes to be associated with the Diagnosis. Additional SNOMED codes can be added manually to any Diagnosis in the **Quick Case Window**. Press **CTRL+L** in these fields to display entries from the **SNOMED Code Library**. To select a library entry, highlight it and click **Select**. When this Diagnosis definition is selected in the **Quick Case Window – Diagnosis tab**, these SNOMED codes are automatically added to the **SNOMED tab**.

- **ICDs** – up to six ICD codes to be associated with the Diagnosis. Additional ICD codes can be added manually to any Diagnosis in the **Quick Case Window**. Press **CTRL+L** in these fields to display entries from the **ICD Code Library**. To select a library entry, highlight it and click **Select**. When this Diagnosis definition is selected in the **Quick Case Window –** **Diagnosis tab**, these ICD codes are automatically added to the **ICD tab**.

- **Table** – if you want a specific table to be entered on every Diagnosis with this Diagnosis definition, click the drop-down menu to display entries from the **Tables Library** and select the appropriate table. When a Diagnosis with this Diagnosis definition is saved in the **Quick Case Window**, the selected table is automatically entered on the Diagnosis. Note that only one table can be entered per Diagnosis, so if more than one Diagnosis with an associated table is selected in the **Quick Case Window**, the first table alphabetically will be selected.

- **Image** – default image file. Each time this diagnosis is used, a **Diagnosis Image** will be attached to the Diagnosis.

Diagnosis Definition Window List Box

- **Source Definition List** – lists all Sources with which the Diagnosis is associated in the **Source Library**.

Diagnosis Definition Window Check Boxes

- **Applies to all Sources** – check this box to flag this Diagnosis definition to always appear in the **Diagnosis List** when selecting a Diagnosis in the **Quick Case Window** regardless of the Specimen Source.

- **Applies to all Procedures** – check this box to flag this Diagnosis definition to always appear in the **Diagnosis List** when selecting a Diagnosis in the **Procedure Window** regardless of the Procedure.

- **Issue Credit** – check this box to indicate that when this Diagnosis is selected, the User should be prompted to issue a credit for the Specimen charge.

- **Malignant** – check this box to flag this Diagnosis definition as a malignant Diagnosis. Malignant Diagnoses can trigger the ordering of Reflex tests and can print in different colors on reports by preference. Additionally, it can be used for statistical reporting.

- **Retired –** check this box to flag this Diagnosis definition as inactive. This Diagnosis will not appear in the **Diagnosis List** when pressing **CTRL+L** in any field that accesses the **Diagnosis Library**.

Charges Library

The **Charges Library** stores all billing and CAP charge codes. Charge codes can be automatically applied to every Case or Specimen or to specific Specimens based on the Specimen Source. Charge codes can also be manually applied to any Case or Specimen. Charges can be applied to Procedures and Profiles automatically and manually.

Charge Codes can optionally be associated with a CPT code.

Once ordered, all Case and Specimen charges can be viewed in the **Charge Selection Window** which can be opened from the **Accession Window**, **Quick Case Window, Prostate Case Window** or **Pap Case Window**.

Click the **Charges Library** to open the **Charges List Window**. Click **New** or **Open** to open the **Workload Definition Window** (Figure 8).

Workload Definition Window

Workload Definition Window Fields

- **Code** – the charge code that is usually a number. This code must be unique.

- **Tech**. – the technical code associated with the charge code.

- **FTEs** – the work unit value or full time equivalent associated with the charge code.

- **Description** – a brief description of the type of work or charge code.

- **CPT Code>** – if you want to associate the charge code with a CPT code, press **CTRL+L** to open the **CPT Library** and select the appropriate CPT code.

- **Fee $** – the chargeable cost of the work.

Figure 8 – **Workload Definition Window**

- **Person to Credit** – if you want to associate the charge code with a person to credit, press **CTRL+L** to open the **Phrases Library – Credit Box** and select the appropriate person to credit.

- **Associate With** – automatically associates charge codes with Cases, Specimens or Sources or leaves them available for manual assignment. For example, if you associate a charge code with *Every Case*, each time a Case is created, it is automatically charged with that charge code. If you associate a charge code with *Every Specimen*, each time any Specimen is added to a Case, that charge is added as a Specimen charge. If you associate a charge code with *Review*, each time any Case is reviewed, that charge is added as a Case charge.

  Sources can be defined in the **Source Library** with an associated charge code. Each time any of these Sources is added to a Case, that charge is added as a Specimen charge. The same rule applies to **Profiles** in the **Profiles Library** and to **Procedures** in the **Procedures Library.**

  The default association is *Manual Assign*. This type of charge is added to a Case or Specimen through the **Charge Selection Window**.

- **Add-on Phrase** – not used.

- **Release Days** – the number of days from today that this charge should be held before being released for billing. When this charge is entered on a Case or Specimen, the Charge Release Date on the Case will be set to the appropriate date. Billing interfaces can be configured to not send charges until the charge release date.

Workload Definition Window List Box

- **Fee Schedule –** lists each fee schedule assigned to the charge code and the corresponding dollar amount.

Workload Definition Window Action Buttons

- **Add** – opens a blank **Fee Window** (Figure 9) to add a fee schedule to the charge code.
- **Delete** – deletes the highlighted fee schedule from the **Fee Schedule List Box**.
- **Edit** – opens the **Fee Window** (Figure 9) for the highlighted fee schedule.

Workload Definition Window Check Box

- **Retired –** check this box to flag this charge as inactive. This charge will not appear in the **Charges List** when pressing **CTRL+L** in any field that accesses the **Charges Library**.

Workload Definition Window Radio Buttons

- **In House** – click this button to flag this charge code as **In House**. The **Charge Codes to Choose From List** in the **Charge Selection Window** can be filtered to display In House charges only.
- **Send Out** – click this button to flag this charge code as **Send Out**. The **Charge Codes to Choose From List** in the **Charge Selection Window** can be filtered to display Send Out charges only.

Workload Definition Window Menu

Workload Menu

- **Add Fee** – **ALT+A** – opens the **Fee Window** (Figure 11) to add a fee schedule to the charge code.

Fee Schedules

In the **Physician Window – Fee Sched Field**, each Physician may be assigned a specific fee schedule. In the **Workload Definition Window**, each charge code may be assigned several fee schedules each with a different dollar amount.

In the following example, Ann Thompson is the submitting Physician for the case. Charge 88347 is assigned to this Case (Figure 9). In the **Physician Window**, Ann Thompson is assigned Fee Schedule TIER 1 (Figure 10). In the **Workload Definition Window**, Charge 88347 has three Fee Schedules assigned to it (Figure 8): Fee Schedule Code TIER 1 with a $10 fee, Fee Schedule Code TIER 2 with a $15 fee and Fee Schedule Code tier 3 with a $20 fee.

Figure 9 – **Charge Selection Window**

Figure 10 – **Physician Window – Fee TIER 1**

Fee Window
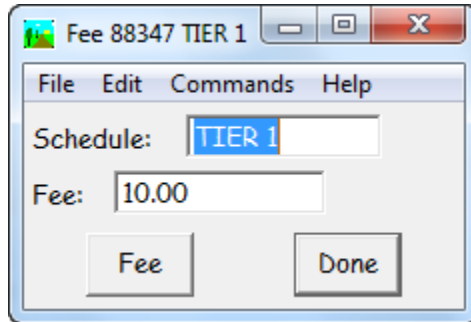
Figure 11 – **Fee Window**

Fee Window Fields

- **Schedule** – type free text or press **CTRL+L** to display entries from the **Phrases Library – Schedule Box**. This schedule can be associated with a Physician in the **Physician Window – Fee Sched field** in order to do tiered billing. All schedules assigned to a charge code are listed in the **Workload Definition Window – Fee Schedule List Box**.

- **Fee** – the dollar amount associated with the fee schedule. The dollar amounts for each schedule are listed next to the appropriate schedule in the **Workload Definition Window – Fee Schedule List Box**.

CPT Library

Some chargeable tasks are used for CPT billing purposes. In **WindoPath**, these tasks are defined by codes in both the **Charges Library** and the **CPT Library**. These codes must be entered in the **CPT Library** first and then are easily accessed while creating charge codes by pressing **CTRL+L** in the **CPT Code field** of the **Workload Definition Window (Charges Library)**.

Click the **CPT Library** to open the **CPT Codes List Window**. Click **New** or **Open** to open the **CPT Code Window** (Figure 12).

CPT Code Window

CPT Code Window Fields

- **Code** – the CPT code is usually a number between 80000 and 90000. This code must be unique.

- **Workload Units** – the workload unit value associated with the CPT code.

- **Description** – standardized universal description of the CPT code.

- **APC Codes** – up to three User-defined APC codes associated with the CPT code.
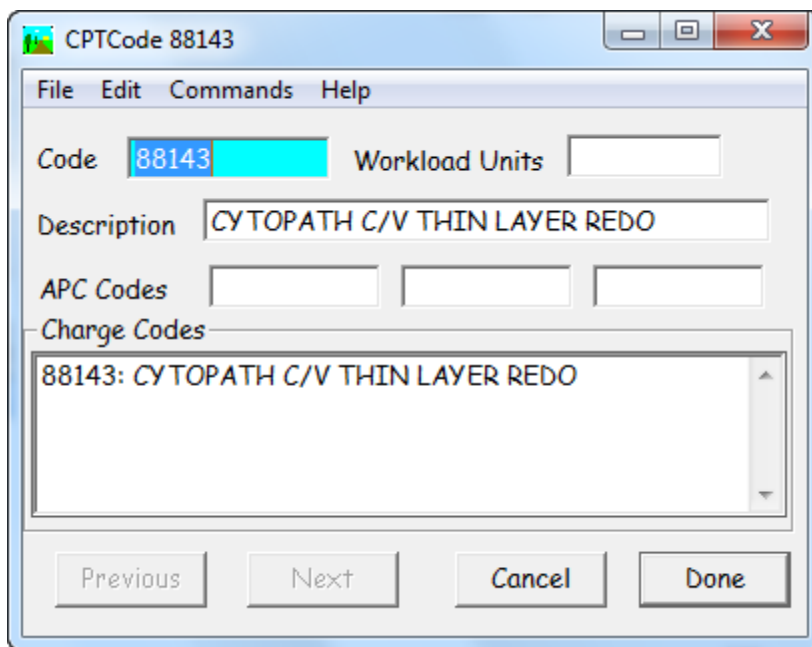
Figure 12 – **CPT Code Window**

CPT Code Window List Box

- **Charge Codes** – If the CPT code has been associated with any charge codes in the **Charges Library**, the charge codes are displayed in this box.

Profiles Library

In WindoPath, the term **Profile** is often used interchangeably with the terms **Panel** (Clinical Panels) and **Block** (Histology Block).

Generally speaking, a **Profile** is created to define the group of **Procedures** or **Clinical Tests** that are routinely ordered together.

For example, a Liver Profile might include the following **Procedures:** H&E, Tri-chrome, Iron and Reticulum.

An example of a common Clinical Profile would be a CBC (Complete Blood Count) and would include the following **Procedures:** WBC, RBC, HGB, HCT, MCV, MCH, MCHC, RDW, RDE-SD, PLT and MPV. Please refer to *Chapter 16* for more information on Clinical Cases and Clinical Profiles.

Click **New** or **Open** on the **Profile List Window** to open the **Profile Window** (Figure 13).

Once profiles are entered into the library, they can be quickly selected in the **Procedure List Window** with minimal keystrokes.

The **Profile Window** contains numerous fields, list boxes and buttons; too many to fit all in one window. For this reason, the **Profile Window** contains a **More button** which when clicked, opens a secondary window containing additional fields and buttons for that Profile.

Profile Definition Window
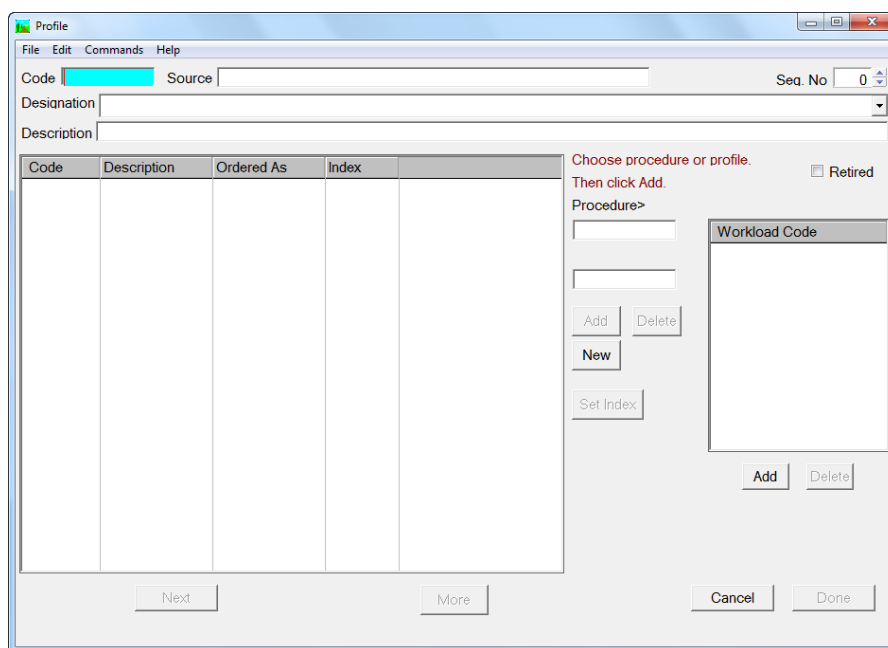
Figure 13 – **Profile Definition Window**

Click the **More button** to open the extended **Profile Definition Window** (Figure 14).

Profile Window Fields

- **Code** – a User-defined code for the profile. This code must be unique.

- **Source –** (for Clinical Profiles ONLY) this is the Specimen source to which this profile applies.

- **Seq**. **No.** – the sequence number of this profile. The sequence number determines the order that profiles are printed in the Internal Clinical Results section on reports.

- **Designation** – a User-defined designation for the profile (for example, BLOCK, SLIDE or PANEL). Click the drop-down menu to display entries from the **Phrases Library – Profile Designation** box.

- **Description** – a User-defined description for the profile.

- **Procedure>** – used to select the procedures that are ordered when the profile is requested. Press **CTRL+L** to display entries from the **Procedures Library**. To select a library entry, highlight it and click **Select** or press **ENTER**. You cannot type free text in this field. After selecting a procedure, it will appear in the **Procedure field**. Click **Add** to add the procedure to the **Procedure List**.

- **Alt. Code** – an alternate **Profile code** can be placed here if the one used in the **Code field** does not match that used by an instrument or other system. An interface would use this field instead of the **Profile code field**.

Figure 14 – **Profile Definition Window Extension**

- **Instrument** – the instrument that this profile is run on. You may type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Instrument Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **LOINC** – the LOINC codes associated with this profile.

- **Vial>** – (for Clinical Profiles ONLY) Vial associated with this profile. Press **CTRL+L** to display entries from the **Vials Library**.

- **Next Profile>** – next profile to be ordered after a user orders this profile.

- **Pref. Loc.** – default performing location.

- **Bill Type** – default bill type.

- **Priority** – default priority (for example, STAT or Routine).

- **Type** – drop-down field allows the user to identify a Profile as **Molecular**. If a Profile is defined as **Molecular** in this field, this Profile will be reported using molecular-specific Report Sections in the Formatter.

- **Amount** – (for Clinical Profiles ONLY) the amount of sample needed to run all of the procedures in this profile. This corresponds with the Vial. If you have a 10 unit Vial and your Profile requires15 units (amount), you will receive labels for two Vials.

- **Text for Result Report** – default text for the given profile. Please note that it will display on the report.

- **Special Requirement** – (for Clinical Profiles ONLY) default special requirement note for the given profile. When a profile is ordered, if this field contains text and if it is ordered through the **Clinical Procedure Order Window** (Accession Window), a dialog box will appear with this text. This is the only time you will see this message.

Profile Window List Boxes

- **Procedure/Profile List Box** – Lists all Procedures and/or Profiles to be automatically ordered on each profile of this type.

  To add a procedure to the list, press **CTRL+L** in the **Procedure>** field to display entries from the **Procedures Library**. To select a library entry, highlight it and click **Select** or press **ENTER**. You cannot type free text in this field. After selecting a procedure, it will appear in the **Procedure>** field. Click **Add** to add the procedure to the **Procedure List**. To delete a procedure from the list, highlight the procedure and click **Delete**. Each profile must have at least one associated procedure. An unlimited number of procedures may be added to a profile.

  All of the above is also **True** if you want to add or delete a **Profile** to the **Profile Window List Box**, with the one exception being that **CTRL+L** is entered in the **Profile>** field rather than the **Procedure>** field.

- **Workload Code (Charges) List Box** – Lists all of the Charge Codes to be automatically ordered on each Profile of this type. To add a Charge Code, click **ADD** to display entries from the **Charges Library**. To select a library entry, highlight it and click **Select** or press **ENTER**. The selected **Charge Code** will appear in the **Workload Code List Box**.

  NOTE: Profiles used in Anatomic Pathology normally do not have associated default Charge Codes. The Charge Codes would be applied to the individual Procedures as well as to the Sources. Please speak to your Application Specialist for specifics.

  However, when working with Clinical Profiles it is typical to add default Charge Codes to the Profile. This is because of the differences in the way tests are ordered for Anatomic versus Clinical cases.

Profile Window Action Buttons

- **Add** *(Procedure/Profile List Box)* – adds the procedure or profile in the **Procedure>** field or **Profile>** field to the **Procedure List**.

- **Delete** *(Procedure/Profile List Box)* – deletes the highlighted procedure from the **Procedure List**.

- **New** *(Procedure/Profile List Box)* – opens the **Procedure Window**, allowing a new procedure to be added to the library.

- **Set Index** *(Procedure/Profile List Box)* – opens a prompt to enter an Index Number for the currently highlighted Procedure in the list. The **Index Number** that is set for each item determines the order in which all items listed are displayed.

- **Add** *(Workload Code List Box)* – opens the **Charges Library List Box** displaying all entries from the **Charges Library.**

- **Delete** *(Workload Code List Box)* – deletes the highlighted charge code from the **Workload Code List Box**.

- **Previous –** advances to previous profile.

- **Next –** advances to next profile.

- **Cancel** – cancel changes.

- **Done** – saves changes and exits window.

- **More –** opens the **Secondary Profile Window**.

Profile Window Check Boxes

- **Retired –** check this box to flag this profile type as inactive. This profile type will not appear in the **Profile List** of the **Clinical Procedure Order Window** or the **Procedure List Window**. Additionally, it will not appear in the **Profile List** when pressing **CTRL+L** in any field that accesses the **Profiles Library**.

- **Send Out –** check this box to flag this profile type as a Send Out. This can be used for statistical purposes.

- **Microbiology** – flag profile as **Microbiology**.

Procedures

In WindoPath, the term **Procedure** is often used interchangeably with the terms **Histology Slide**, **Stain, Test** or **Clinical Test.**

Generally speaking, a **Procedure** is created to define individual **Cytology Slides, Histology Stains, Immunohistochemical (IHC) Stains, Molecular Tests** and **Clinical Tests.**

Examples of **Procedures** would include **H&E, Alcian Blue, CEA, CD15, HPV16, Thin Prep, WBC** and **RBC** to name a few.

Click **New** or **Open** on the **Procedure List Window** to open the **Procedure Definition Window**.

Once procedures are entered into the library, they can be quickly selected in the **Procedure List Window** with minimal keystrokes.

The **Procedure Definition Window** contains numerous fields, list boxes and buttons; too many to fit all in one window. For this reason, the **Procedure Definition Window** contains a **More button** which when clicked, opens a secondary window containing additional fields and buttons for that Procedure.

Procedure Definition Window

Click the **Procedure Library** to open the **Procedure List Window**. Click **New** or **Open** to open the **Procedure Definition Window** (Figure 15).

Procedure Window Fields

- **Code** – a User-defined code for the procedure. This code must be unique.

- **Clinical Code>** – (for Clinical Procedures ONLY) the clinical code associated with this procedure. Press **CTRL+L** to display entries from the **Clinical Test Code Library**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Description** – a User-defined description for the procedure.

- **Work Group** – the work group assigned to the procedure. Press **CTRL+L** to display entries from the **Phrases Library – Work Group Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Status** – displays entries from the **Phrases Library – Profile Status Box**. These are the steps each procedure must go through to become complete or finished.

- **Alt. Code –** an alternate **Procedure code** can be placed here if the one used in the **Code field** does not match that used by an instrument or other system. An interface would use this field instead of the **Procedure code field**.

- **LOINC** – default LOINC associated with the procedure.

- **Report Group –** (for Clinical Procedures ONLY) the report group allows you to group profiles on the reports. Press **CTRL+L** to display entries from the **Report Group Library**. To select a library entry, highlight it and click **Select** or press **ENTER.** This feature is used in conjunction with the **Internal Clinical Results by Group** section in the Report Formatter.

- **Slide Label** – the text that will print in the Tag.slideLabel field on Procedure Label in the Report Formatter. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Procedure Slide Label Box**. To select a library entry, highlight it and click **Select** or press **ENTER**. If there is no slide label text for a particular procedure, the Tag.slideLabel field will print the procedure code.

- **Warning Msg** – a warning message or disclaimer associated with this procedure. This corresponds with the **Warning Message** section in the Report Formatter. The text typed in the Warning Msg field will display in the **Warning Message** section on the report.

- **Table** – if you want a specific table to be entered on every procedure of this type, click the drop-down menu to display entries from the **Tables Library** and select the appropriate table. When a procedure of this type is ordered on a Case, the selected table is automatically entered on the procedure.

- **Overdue In** – number of default hours in which a procedure becomes overdue if that procedure is not at its final step or status.

- **Default Slide Count** – the default number of slides for this procedure.

- **Stainer Code** – the code of the stainer to which an interface should send this procedure (i.e. Dako Stainer).

- **Make Digital Images** – used with Aperio integration for digital slide imaging.

- **Text for Result Report** – (for Clinical Procedures ONLY) default text for result report for this procedure. The text will display in the **Result Text (read only)** field of the **Procedure Result Window**.

Figure 15 – **Procedure Definition Window**

Click the **More button** to open the extended **Procedure Definition Window** (Figure 16).

Figure 16 – **Procedure Definition Window Extension**

Procedure Window List Boxes

- **Status** – lists each processing step for this procedure. Each step is listed in the order in which it is performed. To add a status to the list, click the drop-down menu and select the desired status from the list which appears below the field. The selected status is displayed in the **Status List Box**. To delete a status from the list, highlight the status and click **Delete**. To move a status up from its current position in the list, highlight the status and click **Up** until the status is in the desired position. To move a status down from its current position in the list, highlight the status and click **Down** until the status is in the desired position. Each procedure must have at least one associated status.

- **Diagnosis Code** – (for Clinical Procedures ONLY) lists all Diagnosis definitions to be displayed in the **Diagnosis List** when using **CTRL+L** in the **Diagnosis/Interpretation field** of the **Procedure Result Window** on procedures of this type. To add a Diagnosis definition to the list, click **Add** to display entries from the **Diagnosis Library**. Highlight one or more Diagnosis definitions and click **Select** or press **ENTER**. The selected Diagnosis definitions are displayed in the **Diagnosis Code List**. To delete a Diagnosis from the list, highlight the Diagnosis and click **Delete**.

- **Workload Code** – lists all charges to be automatically added when this procedure is ordered. To add a charge code to the list, click **Add** to display entries from the **Charges Library**. Highlight a code and click **Select** or press **ENTER**. The selected charge code is displayed in the **Workload Code List**. To delete a charge code from the list, highlight the charge code and click **Delete**.

Procedure Window Action Buttons

- **Add** – adds the status in the **Status field** to the **Status List,** opens the **Diagnosis Library** and opens the **Charges Library**.

- **Delete** – deletes the highlighted status from the **Status List**, deletes the highlighted diagnosis from the **Diagnosis Code List** and deletes the highlighted charge code from the **Workload Code List**.

- **Up** – moves the highlighted status up in the **Status List**.

- **Down** – moves the highlighted status down in the **Status List**.

- **Previous** – advances to previous procedure.

- **Next** – advances to next procedure.

- **Cancel** – cancels changes.

- **Done** – saves changes and exits window.

- **More** – opens the **Secondary Procedure Window** for this procedure.

Procedure Window Check Boxes

- **Require Use Flag** – not used.

- **Requires Validation** – flags the procedure as requiring gross validation. Used in conjunction with the user preference **Do Bar Code Validation for Grosses** (116). If user preference 116 is set to **False**, the validation feature can be invoked by clicking the **Modify** menu in the **Quick Case Window** and selecting the **Validate** option.

  If **Requires Validation** is not checked and user preference 116 is set to **True**, the user will be required to scan the case number bar code and the specimen bar code for validation. If **Requires Validation** is checked, the user will be required to scan the case number bar code, the specimen bar code and the specimen block bar code for validation.

- **Retired** – check this box to flag this Procedure as inactive. This Procedure will not appear in the **Procedures List** when pressing **CTRL+L** in any field that accesses the **Procedures Library**.

- **Do not print** – check this box if you do not want this procedure to print in the **Internal Clinical Results** section on reports.

- **Graph** – (for Clinical Procedures ONLY) allows results of this procedure to be graphed. This works in conjunction with the **Clinical Graphs** section in the **Report Formatter**.

- **Require Sign Out** – procedure will require a signature to advance the status to complete.

- **Do Not Print In History** – (for Clinical Procedures ONLY) allows results of this procedure to be put into a history display on the report. This works in conjunction with the **Clinical History by Day** and **Clinical History by Test** sections in the **Report Formatter**. The default is to have this checkbox checked. You must uncheck this box to display history of the results of this procedure.

Procedure Window Radio Buttons

- **Clinical Case Type** – flags the procedure as clinical. This is used in conjunction with the option of **Include Clinical** in the **Procedures** menu of the **Procedure List Window**. When **Include Clinical** is checked, clinical procedures will display in the **Procedure List Window**. When **Include Clinical** is unchecked, clinical procedures will not display in the **Procedure List Window**.

- **Histology Case Type** – flags the procedure as histology (non-clinical). This is used in conjunction with the option of **Include Histology** in the **Procedures** menu of the **Procedure List Window**. When **Include Histology** is checked, histology procedures will display in the **Procedure List Window**. When **Include Histology** is unchecked, histology procedures will not display in the **Procedure List Window.**

- **Both** – flags the procedure as both clinical and histology. This is used in conjunction with the options of **Include Histology** and **Include Clinical** in the **Procedures** menu of the **Procedure List Window**. Procedures flagged as both will display in the **Procedure List Window** regardless of which option is checked or unchecked. It is only when both **Include Histology** and **Include Clinical** are unchecked that these procedures will not display. This will also result in no procedures displaying in the **Procedure List Window.**

Tables Library

The **Tables Library** stores tables that contain predefined data and spaces for variable data.

For example, you could create a table used for resulting: ER/PR molecular Procedures, Flow Cytometry Panel or external CBC for a non-clinical lab.

A **Default Table** can be linked to entries in the Sources, Diagnosis and Procedures Libraries.

A specimen Table can be manually added to the gross or micro of a specimen in the **Quick Case Window.** A diagnosis Table can be manually added to a diagnosis in the **Quick Case Window.** An add-on table can be manually added to an **Add-On** in the **Add-On Window.** A table can be manually added to a **Procedure Result** in the **Procedure Result Window.**

Click **Tables** to open the **Table List Window**. Click **New** or **Open** to open the **Table Definition Window** (Figure 17).
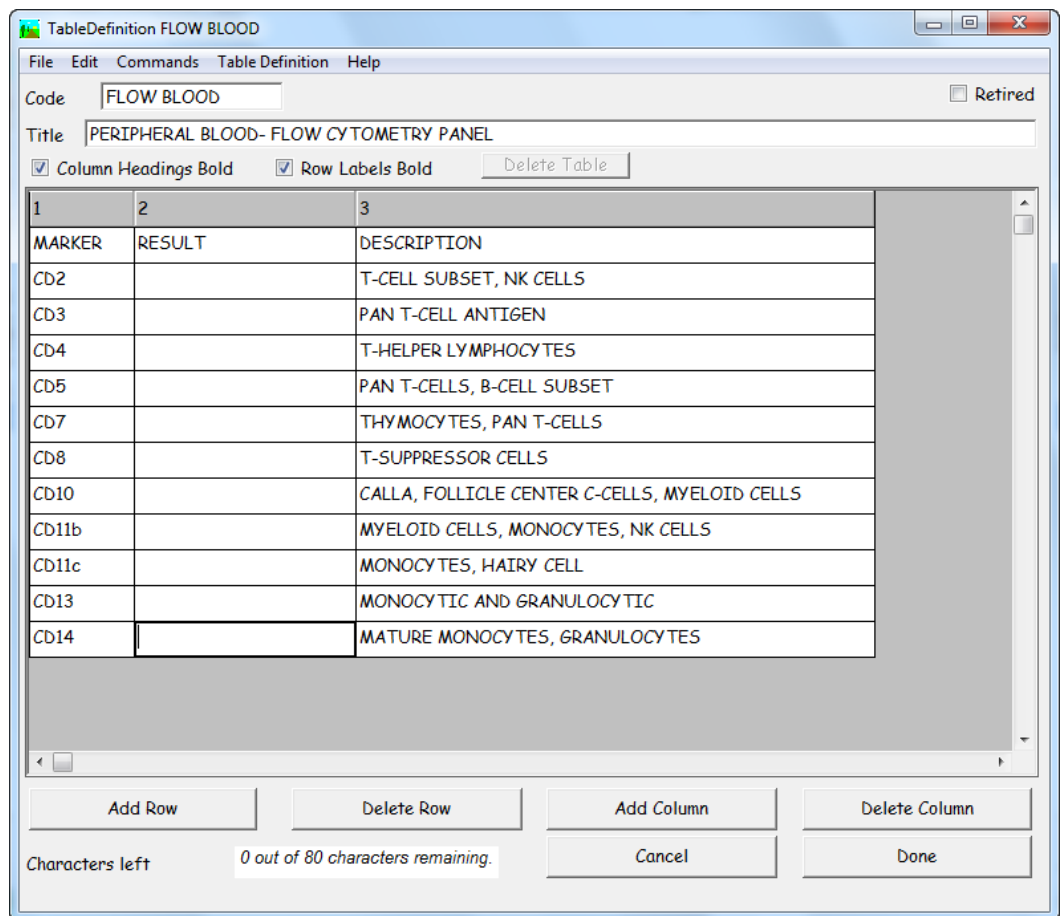
Figure 17 – **Table Definition Window**

Table Definition Window Fields

- **Code** – the User-defined code for the table. This code must be unique.

- **Title** – the User-defined title for the table. This title will appear above the table in the report.

- **Characters Left** – displays the number of remaining characters available out of the total width of the table.

Table Definition Window Action Buttons

- **Add Row** – adds a row to the table. If the table has existing rows, the new row is added after the selected row.

- **Delete Row** – deletes the selected row from the table.

- **Add Column** – adds a column to the table. If the table has existing columns, the new column is added after the selected column.

- **Delete Column** – deletes the selected column from the table.

- **Cancel** – closes the **Table Definition Window** without saving any changes.

- **Done** – closes the **Table Definition Window** saving any changes.

Table Definition Window Check Boxes

- **Column Headings Bold** – marks the column headings in this table to be printed in bold text on reports.

- **Row Labels Bold** – marks the row labels in this table to be printed in bold text on reports.

- **Retired** – check this box to flag this table as inactive. This table will not appear in the **Tables List** when pressing **CTRL+L** in any field that accesses the **Tables Library**.

Building a Table

After the desired number of columns and rows have been added to the table, enter any predefined data (column names, row names, etc.) in the table. The remaining fields in the table can be filled in with variable data when this table is added to a case.

Yellow Pages

The **Yellow Pages** stores the names and addresses of insurance providers or hospitals which receive consults from your laboratory.

Click the **Yellow Pages** to open the **Yellow Pages List Window**. Click **New** or **Open** to open the **Yellow Pages Window** (Figure 18).

Yellow Pages Window

Yellow Pages Window Fields

- **Code** – the User-defined code for the Hospital or Insurance Company. This code must be unique.

- **Name** – the name of the Hospital or Insurance Company.

- **Owner** – the corporation that owns the hospital. Press **CTRL+L** to display entries from the **Yellow Pages Library**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Type** – is this entry a Hospital or Insurance Company. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Company Type Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Street** – the street address of the Hospital or Insurance Company. Up to three lines of text may be entered.

- **City** – the city where the Hospital or Insurance Company is located.

- **State** – the state where the Hospital or Insurance Company is located.

- **ZIP Code** – the Zip code where the Hospital or Insurance Company is located.

- **Phone** – the telephone number of the Hospital or Insurance Company.

- **Cust Svc Phone** – the Customer Service telephone number for the Hospital or Insurance Company.

- **Fee** – not used.

- **Acct #** – account number for the Hospital or Insurance Company.

- **BIN** – the Bin number for the Hospital or Insurance Company.

- **Contact** – the contact name for the Hospital or Insurance Company.

- **Phone** – the telephone number for the Hospital or Insurance Company.

Figure 18 – **Yellow Pages Window**

Yellow Pages Window Check Boxes

- **Retired** – check this box to flag this Hospital or Insurance Company as inactive. This Hospital or Insurance Company will not appear in the **Yellow Pages List** when pressing **CTRL+L** in any field that accesses the **Yellow Pages Library**.

- **Insurance Carrier** – check this box to flag this **Yellow Pages Library** entry as an insurance carrier.

Zip Codes Library

The **Zip Codes Library** contains Zip codes and their associated city, state and county.

Zip codes are displayed when you press **CTRL+L** in the **City field** or the **Zip Code field** of the patient tab in the **Accession Window**. Selecting a Zip code from the **Zip Code List** automatically enters the City, State, County and Zip code.

Click the **Zip Codes Library** to open the **Zip Codes List Window**. Click **New** or **Open** to open the **Zip Code Window** (Figure 19).
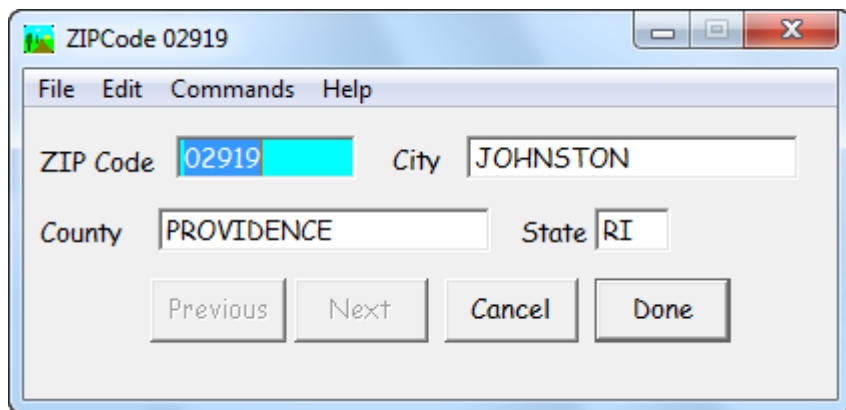
Zip Code Window

Figure 19 – **Zip Code Window**

Zip Code Window Fields

- **ZIP Code** – the numeric postal Zip Code. This code must be unique.
- **City** – the corresponding city for the Zip Code.
- **County** – the corresponding county for the Zip Code.
- **State** – the corresponding state for the Zip Code.

Case Types Library

A **Case Type** may be selected in the **Case Type Drop-Down Menu** before opening the **Accession Window**. The menu displays the list of available case types that are set up in the system.

Each Case Type has a defined **Case Class** which determines the workflow of the Case Type. Certain Case Classes tell WindoPath to open different windows and/or prompts that are specific to that workflow throughout the life of the case. A Case Class can fall under 1 of 12 different categories. These categories include: Autopsy, Bone Marrow, Cytology, Clinical, General, External, Histology, Non-GYN, Pap, Prostate, Surgical and Veterinary.

Some categories only have 1 Case Class available. These include Surgical and Veterinary.

However, some categories have multiple Case Classes available. For example: The Autopsy category has 5 available Case Classes: **Autopsy1Case**, **Autopsy2Case**, **Autopsy3Case**, **Autopsy4Case** and **Autopsy5Case**.

All of the available Case Classes and a brief description of each, are detailed under the section below titled **Case Type Case Classes.**

Case Type Definition Window

Click the **Library** menu and select the **Case Type** option from the **Library Window**. Click **New** or **Open** to open the **Case Type Definition Window** (Figure 20).
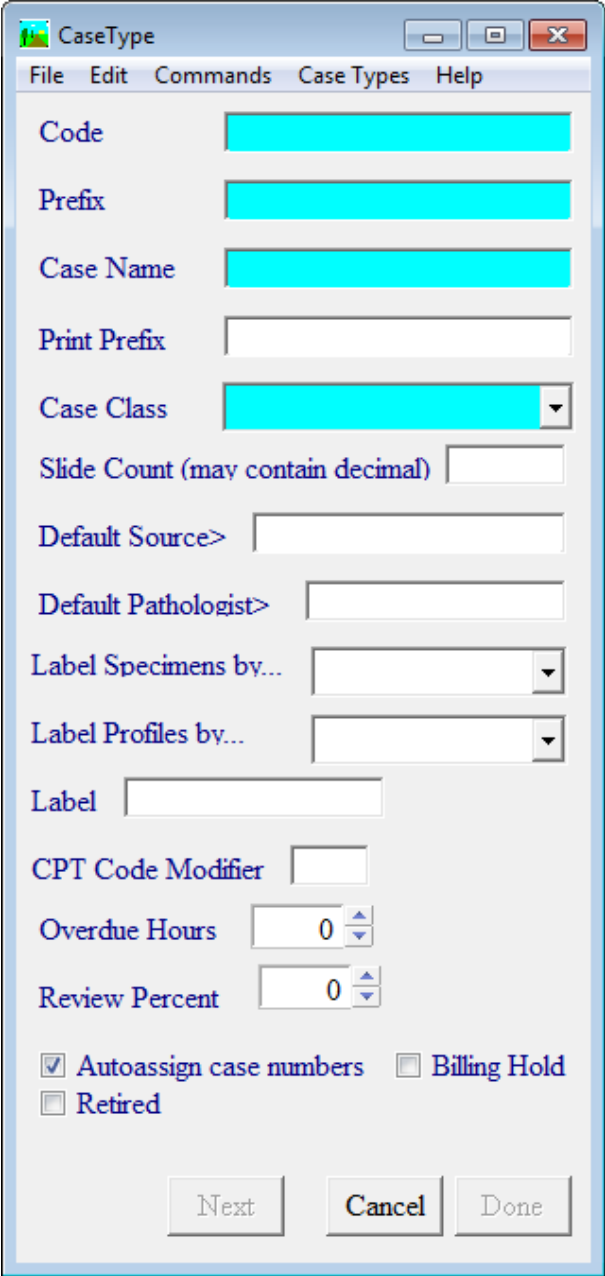
Figure 20 – **Case Type Definition Window**

Case Type Definition Window Fields

- **Code** – the User-defined code for the **Case Type**. This code must be unique.

- **Prefix** – the case number prefix may be up to 4 characters in length. This value is used in the case number itself. If the Prefix is **S**, then the case number for this case type would display as S2014-001234.

- **Case Name** – this is the case name that is used within WindoPath. It will appear in the **Case Name/Type** drop down menus located in the Dispatcher Window, Accession Window and Case List Window.

- **Print Prefix** – the prefix that will print on reports. This value may be different from the value entered for **Prefix** if desired.

- **Case Class** – each **Case Type** is required to have a unique **Case Class** assigned to it. The specified **Case Class** determines the workflow of the **Case Type** (i.e. Surgical versus Pap **Case Classes**).

- **Slide Count** – default number of slides for this **Case Type**. This is most commonly used for Pap, Cytology and Non-GYN **Case Types** to track daily cytotech productivity and slide counts. The value may contain a decimal.

- **Default Source** – default Specimen source for this **Case Type**. **NOTE: A default source is required for Pap **Case Types**.

- **Default Pathologist** – the default pathologist for a **Case Type** will automatically populate the **Pathologist** field in the Case Tab of the Accession Window when the case is accessioned.

- **Label Specimens By** – drop down menu determines how you want your specimens labeled for this **Case Type** (numbered or lettered). This overrides the Site Wide Preference (O4) to **letter specimens instead of numbering** for this **Case Type** only.

- **Label Profiles By** – drop down menu determines how you want your specimen blocks labeled for this **Case Type** (numbered or lettered). This overrides the Site Wide Preference (O20) to **number specimen blocks instead of lettering** for this **Case Type** only.

- **Label** – select a procedure label for this case type. When you select Print or Preview Labels for Selected Procedures from the Labels menu of the Procedure List Window, all procedures for this **Case Type** will use the label format selected in the **Case Type** library.

- **Overdue Hours** – defined in WindoPath as the number of hours between accessioning and completing a case. Once WindoPath recognizes that a case is overdue, the case will display in a pink font in the **Case List Window** as a visual indicator. These cases can be filtered within the **Case List Window** by clicking the **Filter** menu and selecting **Overdue**. The focus of the **Find Field** will change to **Overdue**. Select **True** from the drop down menu. The **Case List Window** is now filtered for **Overdue** cases.

- **Review Percent** – percent of cases for this **Case Type** that should be randomly flagged for review by a pathologist.

Case Type Definition Window Action Buttons

- **Previous** – advances to previous **Case Type** in the **Case Types Library List Window**.

- **Next** – advances to next **Case Type** in the **Case Types Library List Window**.

- **Cancel** – cancels changes.

- **Done** – saves changes and exits window.

Case Type Definition Window Check Boxes

- **Auto-assign Case Numbers** – if checked, allows WindoPath to automatically assign sequential case numbers during accessioning.

- **Retired** – if checked, removes **Case Type** from active use. The **Case Type** is no longer displayed in the accession drop down but historic cases can be retrieved in archives.

- **Billing Hold –** not used.

Case Type Case Classes

- **Autopsy** – used for Autopsy cases. Enables all autopsy-related fields in the Accession Window such as Diener, Death Date and Autopsy Date. This Case Class follows the Surgical work flow and opens the Quick Case Window for result entry.

- **Bone Marrow** – may be used for cases with specimens and tests specific to the bone marrow source (ex: peripheral blood, biopsy for FLOW Cytometry, etc.). This Case Class follows the Surgical work flow and opens the Quick Case Window for result entry.

- **Clinical** – this Case Class follows WindoPath's clinical workflow and thus, should only be used if WindoPath Clinical is enabled. When accessioning a Clinical case, WindoPath does not go to the Specimen Tab after saving the case. Instead, the Clinical Procedure Order Window opens. The Clinical Case Class does not require any result entry (Gross, Microscopic or Diagnosis) in the Quick Case Window, but a user may still do so if desired. When every procedure on the case has been resulted and advanced to its final procedure status, the case status will advance from **Needs Clinical Results** to **Needs Final Report**. Thus, the Clinical Case Class does not require a signature in the Quick Case Window.

- **Cytology** – this Case Class was intended to be used for exception cytology cases. Unlike Pap cases and Non-GYN cases, a Cytology case type will follow the Surgical work flow and be resulted in the Quick Case Window rather than the Pap Window. This is a popular alternative to using the Non-GYN Case Class for non-GYN cases and specimens.

- **External –** an optional Case Class intended to be used for referrals or cases from an outside source. This Case Class follows the Surgical work flow and opens the Quick Case Window for result entry.

- **General** – this Case Class was intended to be used for surgical or general cases. There are dozens of preferences that specifically control the statuses

used for the general case type. Using this Case Class opens the Quick Case Window for result entry.

- **Histology** – after accessioning, this case type will advance from **Needs Specimen** to **Needs Signature**. It does not require any result entry (Gross, Microscopic or Diagnosis) in the Quick Case Window but a user may still do so if desired. When every procedure on the case has been advanced to its final procedure status, the case status will then advance from **Needs Signature** to **Needs Final Report**. Thus, the Histology case type does not require a signature in the Quick Case Window. This Case Class is commonly used for:

  - Non-Global Cases: Partial processing in the lab, for example, **Technical Only** or **Professional Only** cases.

  - Molecular-Only Cases: Individual procedures such as HPV and FISH are resulted in the Procedure Result Window.

- **Non-GYN** – this Case Class follows a workflow suitable for Non-GYN Cytology cases. Similar to Pap Cases, WindoPath will open the Pap Window for result entry rather than the Quick Case Window.

- **Pap** – this Case Class follows a workflow suitable for GYN Cytology/Pap cases. Specifically, when a user opens a Pap case type (that has one of the Pap Case Classes defined) WindoPath will open the Pap Window for result entry rather than the Quick Case Window.

- **Prostate** – this Case Class is available when the Reserved Preferences for Prostate Processing are enabled. It follows a specific workflow suitable for accessioning and resulting Prostate cases. When a user accessions a Prostate case and clicks **Save Case** on the Case Tab, WindoPath will open the **Prostate Sectors Selection Window** before moving onto the Specimen Tab. When a user opens a Prostate case, WindoPath will open the Prostate Window for result entry rather than the Quick Case Window.

- **Surgical** – this Case Class was intended to be used for surgical or general cases. There are dozens of preferences that specifically control the statuses used for the surgical case type. Using this Case Class opens the Quick Case Window for result entry.

- **Veterinary** – this Case Class was intended to be used for veterinary (non-human) cases. This Case Class follows the Surgical work flow and opens the Quick Case Window for result entry.

ICD Code Library

WindoPath v8 accommodates both ICD9 Codes and ICD10 Codes simultaneously in the **ICD Code Library.** The **ICD Code Library** stores ICD Codes that can be associated with canned Diagnoses in the **Diagnosis Library** and in the **Phrases Library** to be added automatically by default. For more information on how to link ICD Codes to Diagnoses or Phrase, see the sections **Coded Phrase Window Fields** and **Diagnosis Definition Window Fields**.

ICD Codes can be manually added to the ICD tab of the **Quick Case Window** by clicking the **Add/Delete** menu and selecting Add ICD9 Code. To select a library entry, highlight it and click **Select** or press **ENTER**. You can also use the keyboard shortcut of **CTRL+SHFT+I** in the **ICD Tab** in the **Quick Case Window.**

The User may choose to either build the **ICD Code Library** manually or download the standardized **ICD Library** and import it into WindoPath themselves. For more information on importing ICD Codes, please contact your Implementation Specialist.

To manually create a new item, select *ICD Codes* from the *Library Menu* to open the **ICD Code List Window**. Click **New** or **Open** to open the **ICD Code Window** (Figure 21).

ICD Code Window

Figure 21 – **ICD9 Code Window**

ICD Code Window Fields

- **Code** – the ICD code. This code must be unique. This code may include decimal points.
- **Description** – the description of the code.

ICD Code Window List Box

- **Diagnosis Definitions** – if the ICD code has been associated with any Diagnosis definitions in the **Diagnosis Library**, the Diagnosis definitions are displayed in this box.

ICD Code Window Check Boxes

- **Retired –** check this box to flag this ICD code as inactive. This ICD code will not appear in the **ICD Code List** when pressing **CTRL+L** in any field that accesses the **ICD Code Library**.

Drugs Library

The **Drugs Library** is specific to WindoPath Toxicology. It contains prescribed drugs and their analytes /metabolites.

Drugs Definition Window

Click the *Library menu* and select the **Drugs** option to open the **Drug List Window**. Click New or Open to open the **Drugs Definition Window** (Figure 22).
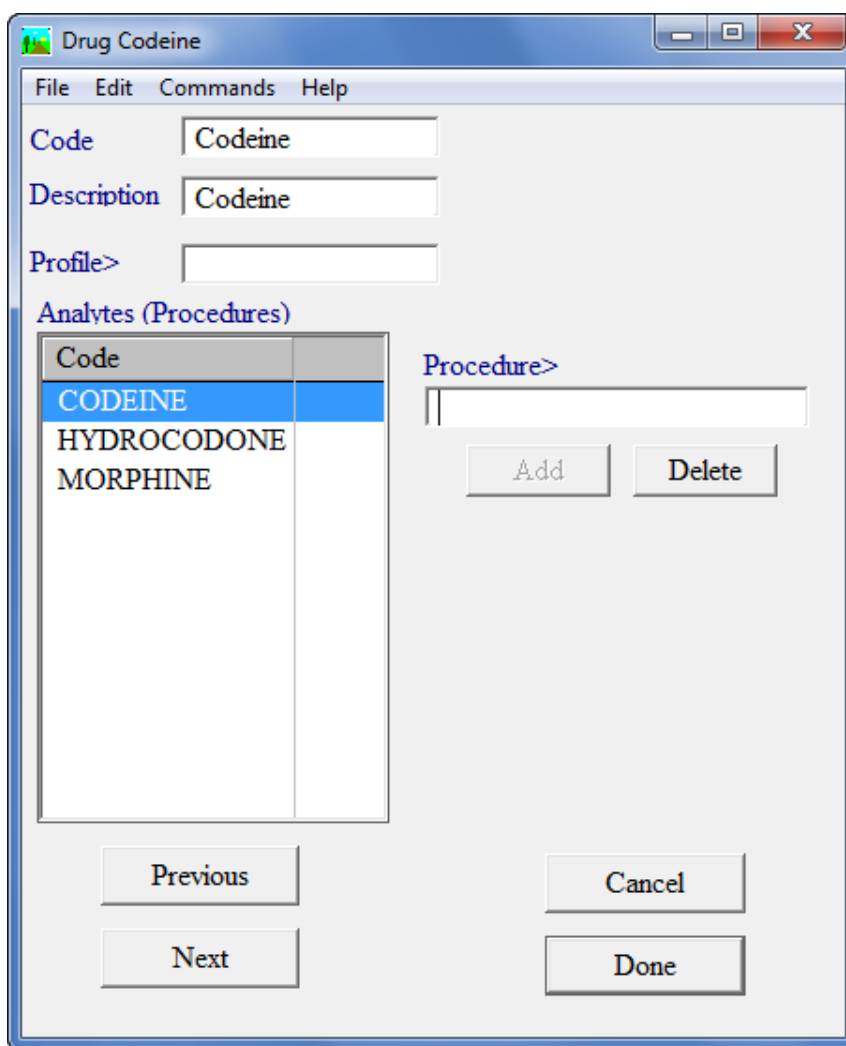
Figure 22 – **Drug Definition Window**

Drugs Definition Window Fields

- **Code** – the Drug code. This code must be unique.
- **Description** – the description of the Drug.
- **Profiles>** – not used.

Drugs Definition Window List Boxes

- **Analytes (Procedures)** – lists all Analytes (Procedures) that make up this Drug.

  To add an Analytes (Procedure) to the list, press **CTRL+L** in the **Procedure>** field to display entries from the **Procedures Library**. To select a library entry, highlight it and click **Select** or press **ENTER**. You cannot type free text in this field. After selecting a procedure, it will appear in the **Procedure>** field. Click **Add** to add the procedure to the **Procedure List**. To delete a procedure from the list, highlight the procedure and click **Delete**. Each profile must have at least one associated procedure. An unlimited number of procedures may be added to a profile.

Drugs Definition Window Action Buttons

- **Add** – adds the Procedure in the **Procedure field** to the **Analytes (Procedure) List**.

- **Delete** – deletes the highlighted Procedure in the **Analytes (Procedure) List**.

- **Previous** – advances to previous Drug.

- **Next** – advances to next Drug.

- **Cancel** – cancels changes.

- **Done** – saves changes and exits window.

LOINC Code Library

The **LOINC Code Library** allows you to manually build all of the needed LOINC Codes. If you would like to have them imported, please speak with your Implementation Specialist.

LOINC Codes may be attached to Profiles or Procedures to be added automatically by default. They may also be attached manually using the **Display menu** and selecting the **LOINCs** option.

LOINC Code Definition Window

Click the *Library menu* and select the **LOINC Codes** option to open the **LOINC Code List Window**. Click New or Open to open the **LOINC Code Definition Window** (Figure 23).
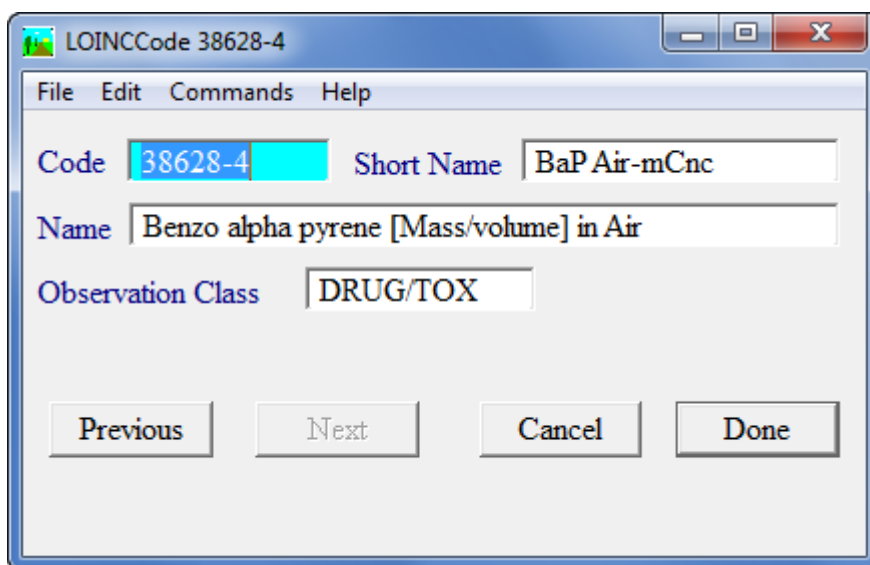
Figure 23 – **LOINC Code Definition Window**

LOINC Code Definition Window Fields

- **Code** – the LOINC code. This code must be unique.
- **Short Name** – the short Name of the LOINC Code.
- **Name** – the full description or Name of the LOINC Code.
- **Observation Class** – the LOINC Observation Class.

LOINC Code Definition Window Action Buttons

- **Previous –** advances to previous LOINC Code.
- **Next** – advances to next LOINC Code.
- **Cancel** – cancels changes.
- **Done** – saves changes and exits window.

Physician Panels Library

Physician Panels are only used with **Clinical Case Classes**.

Each **Physician Panel** consists of one or more **Super Panels. Super Panels** consist of multiple profiles**.**

The **Physician Panels** are linked to a Physician in the **Physician Library**. Each **Physician Panel** can be used many times. However, each Physician can have only one **Physician Panel**.

If there is a **Physician Panel** assigned to the Submitter, you will be limited to only those **Super Panels** which make up the **Physician Panel** for this Submitter.

If there is no **Physician Panel** assigned to the Submitter, you will be able to select any **Super Panel**.

Physician Panels Definition Window

Click the *Library menu* and select the **Physician Panels** option to open the **Physician Panels List Window**. Click New or Open to open the **Physician Panels Definition Window** (Figure 24).

Figure 24 – **Physician Panel Definition Window**

Physician Panels Definition Window Fields

- **Code** – the **Physician Panel** code. This code must be unique.
- **Description** – the description of the **Physician Panels**.
- **Seq. No.** – not used.

Physician Panels Definition Window List Boxes

- **Super Panel** – lists all of the **Super Panels** that make up this **Physician Panel**.

  To add a **Super Panel** to the list, press **CTRL+L** in the **Profile>** field to display entries from the **Super Panel Library**. To select a library entry, highlight it and click **Select** or press **ENTER**. You cannot type free text in this field. After selecting a **Super Panel**, it will appear in the **Profile>** field. Click **Add** to add the **Super Panel** to the **Super Panel List**. To delete a **Super Panel** from the list, highlight the **Super Panel** and click **Delete**. Each **Physician Panel** must have at least one associated **Super Panel**. An unlimited number of **Super Panels** may be added to a **Physician Panel**.

Physician Panels Definition Window Action Buttons

- **Add** – adds the **Super Panel** in the **Profile>** field to the **Super Panel List**.
- **Delete** – deletes the highlighted **Super Panel** in the **Super Panel List**.
- **New** – opens the **Super Panel Definition Window** and allows the user to create a new **Super Panel**.
- **Previous –** advances to previous **Physician Panel**.
- **Next** – advances to next **Physician Panel**.
- **Cancel** – cancels changes.
- **Done** – saves changes and exits window.

Physician Panels Definition Window Checkboxes

- **Retired –** check this box to flag this **Physician Panel** as inactive. This **Physician Panel** will not appear in the **Physician Panel List** when pressing **CTRL+L** in any field that accesses the **Physician Panel Library**.

Rack Definitions Library

The **Rack Definitions** are computer representations of the physical Specimen, Procedure and Profile racks that your lab uses for storing these items.

You must first define your racks in the **Rack Definitions Library.** Once that has been done, you will be able to track your Specimens, Procedures and Profiles using Rack Loading.

Rack Definition Window

Click the *Library menu* and select the **Rack Definitions** option to open the **Rack Definitions List Window**. Click New or Open to open the **Rack Definition Window** (Figure 25).
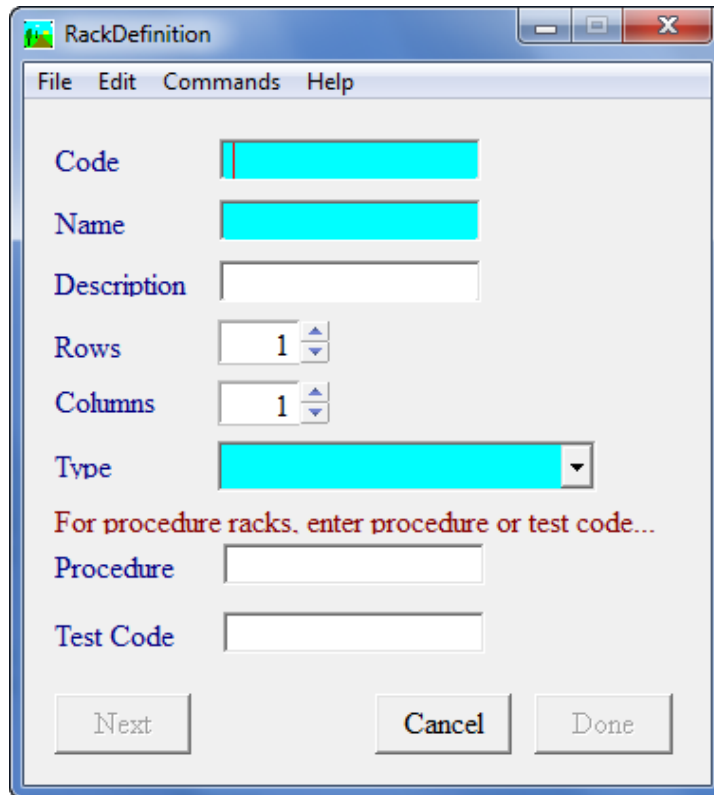
Figure 25 – **Rack Definition Window**

Rack Definition Window Fields

- **Code** – the **Rack Definition** code. This code must be unique.

- **Name** – the name of the **Rack**.

- **Description** – the description of the **Rack**.

- **Rows** – the number of rows in your **Rack**.

- **Columns** – the number of columns in your **Rack.**

- **Type** – the rack type (Specimen, Procedure or Profile).

- **Procedure** – if this rack is a procedure rack, you can limit the rack to one Procedure. Click **CTRL+ L** to open the **Procedure Library**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Test Code** – if this rack is a procedure rack, you can limit the rack to one Clinical Test. Click **CTRL+ L** to open the **Clinical Test Code Library**. To select a library entry, highlight it and click **Select** or press **ENTER**.

Rack Definition Window Action Buttons

- **Previous –** advances to previous **Rack Definition**.

- **Next** – advances to next **Rack Definition**.

- **Cancel** – cancels changes.

- **Done** – saves changes and exits window.

Reflex Test Library

Many pathology and clinical laboratories frequently order follow-up tests when certain results are observed when resulting. This is known as reflex testing. Reflex tests are used to clarify or elaborate on primary test results. WindoPath can automatically initiate the ordering of a reflex test for a case. This is known as a reflex rule. User Privilege 118, **Modify Reflex Rules**, must be set to **True** for the user to access the Reflex Tests Library.

From the **Librarian Window**, select **Reflex Rules** from the **Library Menu** to open the **Reflex Test List Window.** Click **New** or **Open** to open the **Reflex Test Definition Window** (Figure 26).

Reflex Test Window Fields

- **Code** – the User-defined code for the reflex test. This code must be unique.
- **Description** – the User-defined name for the reflex test.
- **Logical Statement** – statement specifying reflex parameters. Use **ALT+I** to insert items from lists. Position the cursor and use **ALT+I** to insert a field. Highlight a part of a rule and use **ALT+B** to add brackets.
- **Order this Profile>** – hit **CTRL+ L** to select from the Profiles Library. If the Reflex Rule is triggered, this Profile will be ordered automatically. Specify the Profile Designation in the drop-down menu adjacent to this field.
- **Cancel Profile>** – hit **CTRL+ L** to select from the Profiles Library. If the Reflex Rule is triggered, this Profile will be cancelled automatically.
- **Cancel Proc>** – hit **CTRL+ L** to select from the Procedures Library. If the Reflex Rule is triggered, this Procedure will be cancelled automatically.
- **Insert this Comment in Profile** – if the Reflex Rule is triggered, this Comment will appear below the Procedure name and print on the report.
- **Display this Message>** – if the Reflex Rule is triggered, this Message will display in a pop up.
- **Add this Flag** – drop-down menu displays items from the **Customer Service Module (QA).** If the Reflex Rule is triggered, a Customer Service Flag will be assigned automatically.
- **Mathematical Statement** – mathematical statement specifying result calculation. Result will be inserted in ordered Profile.

Reflex Test Window Action Buttons

- **Check** – opens a dialog box determining if the statement entered is legal or illegal. If the statement is legal, the message **Successful Evaluation to False** is displayed. If the statement is illegal, it will display as such.

- **Next** – opens the next reflex test in the **Reflex Test List Window**.

- **Previous** – opens the previous reflex test in the **Reflex Test List Window**.

- **Cancel** – closes the **Reflex Test Window** without saving any changes.

- **Done** – closes the **Reflex Test Window** saving any changes.

Figure 26 – **Reflex Test Definition Window**

Creating a Reflex Rule

The first step in creating a reflex test is figuring out what it is that you want it to do. Example: "Whenever a pap case contains the word ASCUS in the diagnosis, then order the HPV Profile." This information is what WindoPath will consider as criteria that must be met for it to automatically order the defined profile.

1) Enter a code and description. The description can be as simple as the criteria that you will define: "Whenever a pap case contains the word ASCUS in the diagnosis, automatically order the HPV Profile."

2) In the large text box in the middle of the window, you must enter the test's specific criteria as a **Logical Statement**. The **Reflex** Menu has 2 items in it to assist in the mathematical statement; **Insert** and **Add Brackets**.

3) Select **Insert** from the Reflex Menu. The Report Field Selection Window will open. Similar to how all of the fields are listed in the Formatter when creating a Field Template, every report field in WindoPath is listed in the **Report Fields** list box to the LEFT of the window (Figure 27).

4) For this example, first scroll down the list and find the item with the Type = **Case** and the Item = "casetype."

5) Simply double click on that item; the window will close and you will be brought back to the Reflex Test window. You will notice that "Case.caseType" has been added to the large text box (Figure 28).
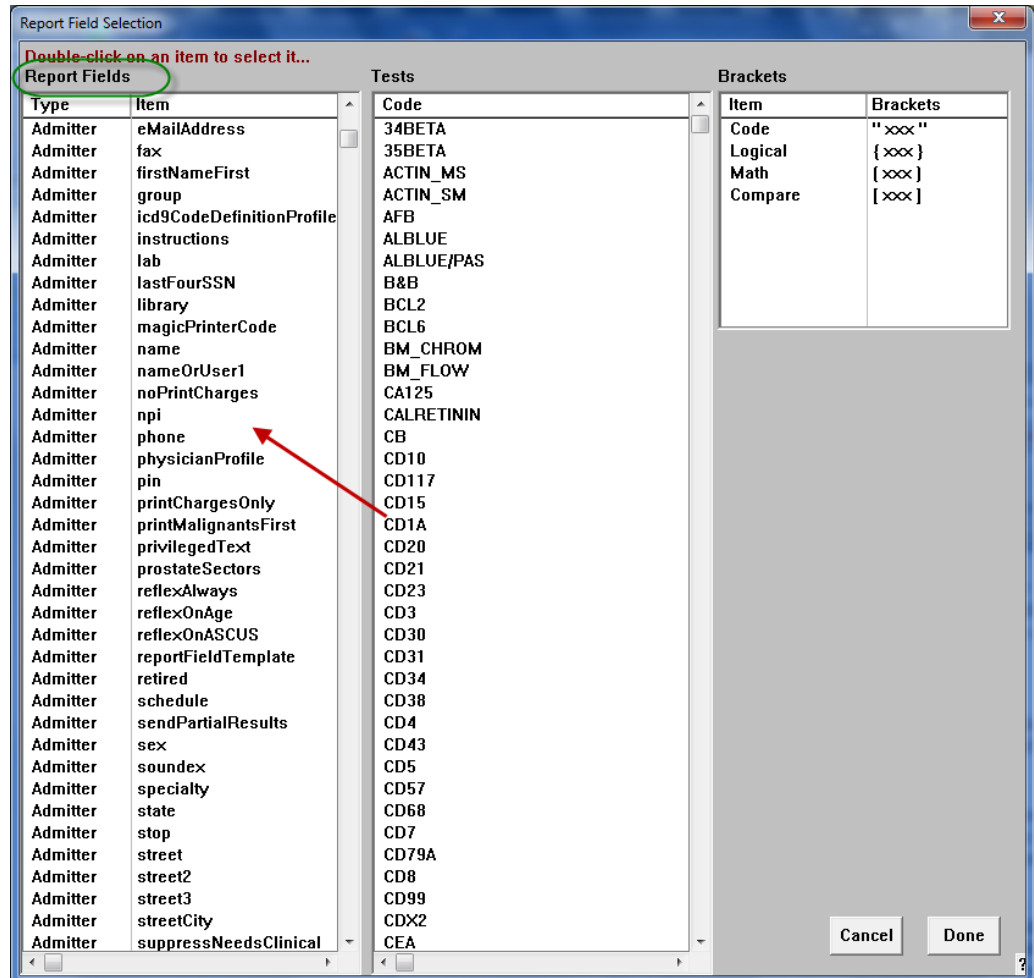
Figure 27 – **Report Field Selection Window**

6) Put your cursor in the text box to the right of "Case.caseType" and enter a space followed by = pap1case.

Ex: "Case.caseType" = pap1case

This is a part of the following logical statement: *"Whenever a pap case contains the word ASCUS in the diagnosis, automatically order the HPV Profile."*

7) Because this is only a part of the equation, you need to put the item in brackets. Highlight the entire phrase and select **Insert Brackets** from the Reflex Menu.

8) Next, enter a space and enter the AND symbol & as the logical operator. Enter another space.

9) Repeat steps 3 and 4 from above, except this time, scroll down the list and find the item with the Type = Diagnosis and the Item = text. This adds the following to your statement: "Diagnosis.text."

10) Position your cursor after this text, enter a space, enter the PERCENT symbol %, enter another space and then enter ASCUS.

Example: "Diagnosis.text" % ASCUS

This is a part of the following logical statement: *"Whenever a pap case contains the word ASCUS in the diagnosis, automatically order the HPV Profile."*

11) Put this second item in brackets as was done with the first item in step 7 above. So far, your logical statement should look like the following:

["Case.caseType" = pap1case] & ["Diagnosis.text" % ASCUS]

12) The final step in the creation of your logical statement is to enclose the entire statement above in a set of brackets. To do this, highlight the entire expression and select **Insert Brackets** from the Reflex Menu as you did in steps 7 and 11.

Your logical statement should now look like the following:

{["Case.caseType" = pap1case] & ["Diagnosis.text" % ASCUS]}

**TIP: The logical statements that you create for your Reflex Rules are like the mathematical equations that are seen in basic Algebra. For example, we all know that (3 + 2) / 4 is very different from 3 + (4 / 2). In other words, where you place the brackets in your logical statement is very important.

13) In the **Order this profile>** field (Figure 28), enter **CTRL+L** and select the appropriate item from the Profiles Library. In this example, you would choose the HPV profile.

This is a part of the following logical statement: *"Whenever a pap case contains the word ASCUS in the diagnosis, automatically order the HPV Profile."*

14) Click the **Done button** to save. When you do this, WindoPath will check to see if your Reflex Rule is logical or not. If it is logical, it will display **Successful evaluation to False** (Figure 29) in the window that appears. Click the **Done button**.

If it is NOT logical, the window will display what is wrong with the statement. Example: **Illegal Statement** or **Unmatched curly brackets**.

**NOTE: If WindoPath does NOT display Successful evaluation to False in the window, the user should know that the statement is invalid and needs to be modified.

15) When the check is finally successful, click **Done**. You have just successfully created a Reflex Test.

Figure 28 – **Reflex Test Definition Window**

Figure 29 – **Compilation Window**

Assigning Reflex Rules to Physicians

At this point, WindoPath knows: *"Whenever a pap case contains the word ASCUS in the diagnosis, automatically order the HPV Profile."*

A reflex test in the Reflex Tests Library will NOT automatically initiate UNLESS the specific reflex test has been assigned to the submitting physician on the case. Clinical cases are an exception to this rule.

Let us say that you want the Reflex Test in this example to ONLY automatically initiate for 2 out of all of your submitting physicians in Human Resources and NOT for the rest of the physicians. You would need to assign the specific Reflex Rule to those 2 specific physicians.

**NOTE: If you would like for a Reflex Test to apply to ALL of your physicians in Human Resources, you MUST assign the Reflex Rule to every physician.

1) In Human Resources, open the appropriate physician record. Notice the **Rule List Box** in the bottom left corner of the window. It lists the Reflex Rules that have been assigned to the physician.

2) Click the **Add button**. The **Physician Reflex** window will appear. In the required field labeled **Reflex Rule**. Use **CTRL+L** to pick the desired Reflex Test from the Reflex Test Library pick list that appears. Then click **Done**.

3) The physician's **Rule List Box** (in the physician record window) will now display the assigned reflex rule(s).

Triggering a Reflex Rule

At this point, WindoPath knows the following to be **True**:

"When the submitter assigned to a case is Dr. Laura Nevel, check to see if the criteria in her assigned reflex rule coded ASCUS (the criteria being that the case is a pap1case and the diagnosis contains the word ASCUS) matches. If it does, then automatically order the HPV profile when the case is signed out."

1) The submitter assigned to this pap case is Dr. Laura Nevel. The diagnosis given is **Atypical Squamous cells of undetermined significance (ASCUS)**.

2) After the pathologist enters his/her electronic signature at sign out, the prompt **Reflex order HPV** appears.

3) Click **Yes** to confirm and then a second prompt will appear reading **Ordered HPV**. Click **OK**.

4) Now if you open the Procedures Window for this case, you will see that the HPV profile has been added to the existing block/profile THIN.

Report Groups Library

Report groups are used for Clinical cases only. They allow a lab to group procedures by lab defined **Report Groups**. They appear on the reports using the *Internal Clinical Results by Group* section.

Select **Report Groups** from the **Library** Menu to open the **Report Groups List Window**. Click **New** or **Open** to open the **Report Group Definition Window** (Figure 30).

Figure 30 – **Report Group Definition Window**

Report Group Window Fields

- **Code** – the **Report Group** code. This code must be unique.

- **Label** – the title of the **Report Group** section on the report.

- **Order group appears on report** – if you have multiple groups, this will determine in what order they appear on the report.

- **Description for Report** – the description of the **Report Group** that will print on the report under the Label (title).

- **Procedure>** – used to select the procedures that will be part of this group. Press **CTRL+L** to display entries from the **Procedures Library**. To select a library entry, highlight it and click **Select** or press **ENTER**. You cannot type free text in this field. After selecting a procedure, it will appear in the **Procedure field**. Click **Add** to add the procedure to the **Procedure in Group List**.

- **Profile>** – used to select the profiles that will be part of this group. Press **CTRL+L** to display entries from the **Profiles Library**. To select a library entry, highlight it and click **Select** or press **ENTER**. You cannot type free text in this field. After selecting a profile, it will appear in the **Profile field**.

Click **Add** to add the procedures contained in this profile to the **Procedure in Group List**.

Report Group Window Action Buttons

- **Add** – adds the procedure or profile in the **Procedure>** or **Profile>** fields to the **Procedure in Group List**.

- **Delete** – deletes the highlighted procedure or profile from the **Procedure in Group List**.

- **New** – opens the **Procedure Definition Window** and allows the user to create a new procedure.

- **Set Index** – opens a prompt to enter an Index Number for the currently highlighted Procedure in the list. The Index Number that is set for each item determines the order in which all items listed are displayed within the **Report Group** on the report.

- **Previous** – advances to previous **Report Group**.

- **Next** – advances to next **Report Group**.

- **Cancel** – cancels changes.

- **Done** – saves changes and exits window.

Scheduled Reports Library

The **Scheduled Reports Library** stores predefined print jobs. Various parameters are set for each print job (Case type, Case Needs, days of the week, etc.), then each print job runs automatically on the specified days and times. Scheduling reports eliminates the need to print batch reports manually.

Select **Scheduled Reports** from the **Library Menu** to open the **Scheduled Report List Window**. Click **New** or **Open** to open the **Scheduled Report Definition Window** (Figure 31).

Scheduled Report Window

Scheduled Report Window Fields

- **Code** – the User-defined code for the **Scheduled Report**. This code must be unique.

- **Description** – the User-defined description of the **Scheduled Report**.

- **Last Run Time** – the last time the **Scheduled Report** ran.

- **Start** – the time you want the **Scheduled Report** to start running.

- **Interval** – the length of time between each **Scheduled Report** run.

- **End** – the time you want the **Scheduled Report** to stop running.

- **Default Printer** – the printer where the scheduled reports will print unless you are using Collate by Physician Location and there is a default printer assigned to the Physician Location.
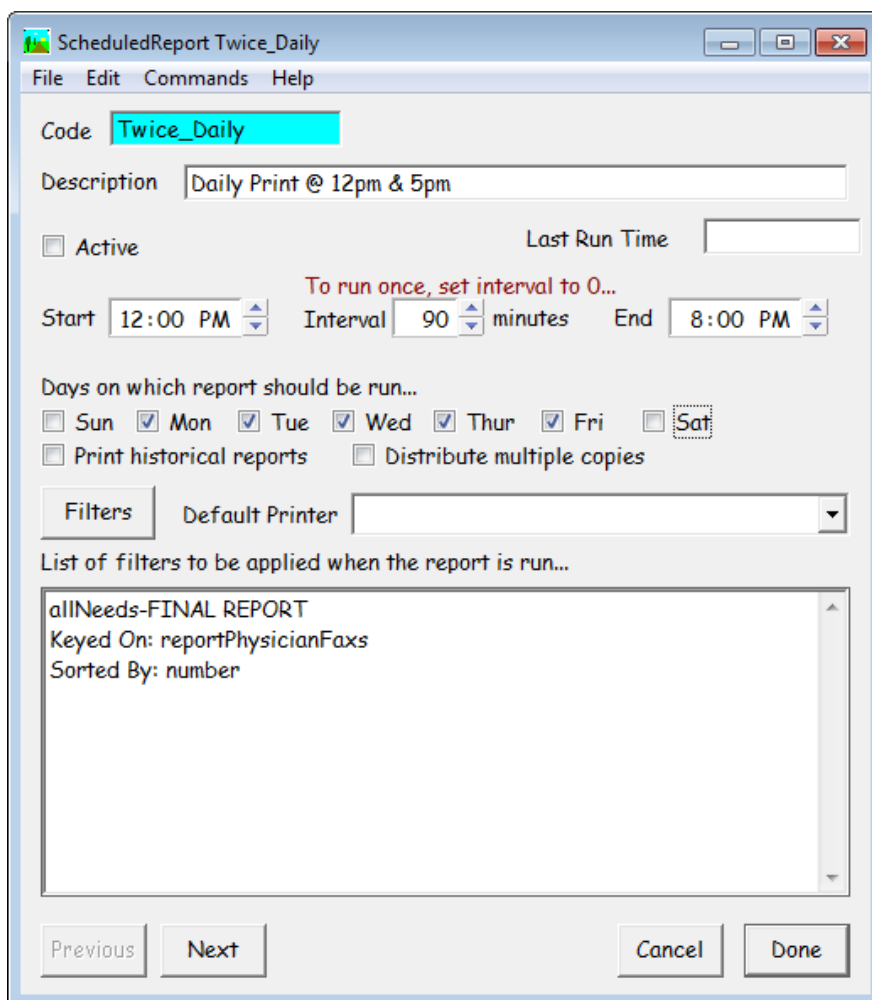
Figure 31 – **Scheduled Report Definition Window**

Scheduled Report Window Action Buttons

- **Filters** – opens the **Case List Window**, where the parameters for the print job are selected. Filter the **Case List** by Case type, Needs or any other criteria. Select the desired distribution method from the *Case Report Menu*. Click **Done** to return to the **Scheduled Report Window**. The selected criteria will be used when the **Scheduled Report** is run. For example, if the **Case List** was filtered to Surgical Cases at Needs Final Report, when the print job runs, only Surgical Cases at Needs Final Report will be printed.

- **Previous** – opens the previous **Scheduled Report** in the **Scheduled Report List Window**.

- **Next** – opens the next **Scheduled Report** in the **Scheduled Report List Window**.

- **Cancel** – closes the **Scheduled Report Window** without saving any changes.

- **Done** – closes the **Scheduled Report Window** saving any changes.

Scheduled Report Window Check Boxes

- **Active –** when checked, enables the **Scheduled Report** to run as defined. When unchecked, the **Scheduled Report** will not run.

- **Sun – Sat** – the days of the week the **Scheduled Report** should run.

- **Print historical reports** – check this box if you want the Related Cases section to print on the reports.

- **Distribute multiple copies** – check this box if you want copies to print for each Physician associated with each Case, as well as an Original copy of each report. If this box is not checked, only an Original report copy will print for each Case.

SNOMED Code Library

The **SNOMED Code Library** stores SNOMED codes that can be associated with specific Diagnoses in the **Diagnosis Library** or with Pap Diagnoses in the **Coded Phrases Library**. These codes must be entered in the **SNOMED Code Library** first and then are easily accessed while creating diagnosis definitions or coded phrases. While in the **SNOMED Code field** of those windows, press **CTRL+L** and select the appropriate code. SNOMED codes can also be manually added to Diagnoses in the **Quick Case Window**.

Select *SNOMED Codes* from the *Library Menu* to open the **SNOMED Code List Window**. Click **New** or **Open** to open the **SNOMED Code Definition Window** (Figure 32).

SNOMED Code Window

Figure 32 – **SNOMED Code Definition Window**

SNOMED Code Window Fields

- **Code** – the **SNOMED Code**. This code must be unique. This code may include decimal points.

- **Description** – the User-defined description of the **SNOMED Code**.

SNOMED Code Window List Box

- **Diagnosis Definitions** – if the SNOMED code has been associated with any Diagnosis definitions in the **Diagnosis Library**, the Diagnosis definitions are displayed in this box.

Super Panels Library

Super Panels are used for Clinical cases only. The **Super Panels Library** allows the user to define different combinations of profiles enabling the user to order multiple profiles all at once.

Select **Super Panels** from the *Library Menu* to open the **Super Panels List Window**. Click **New** or **Open** to open the **Super Panel Definition Window** (Figure 33).
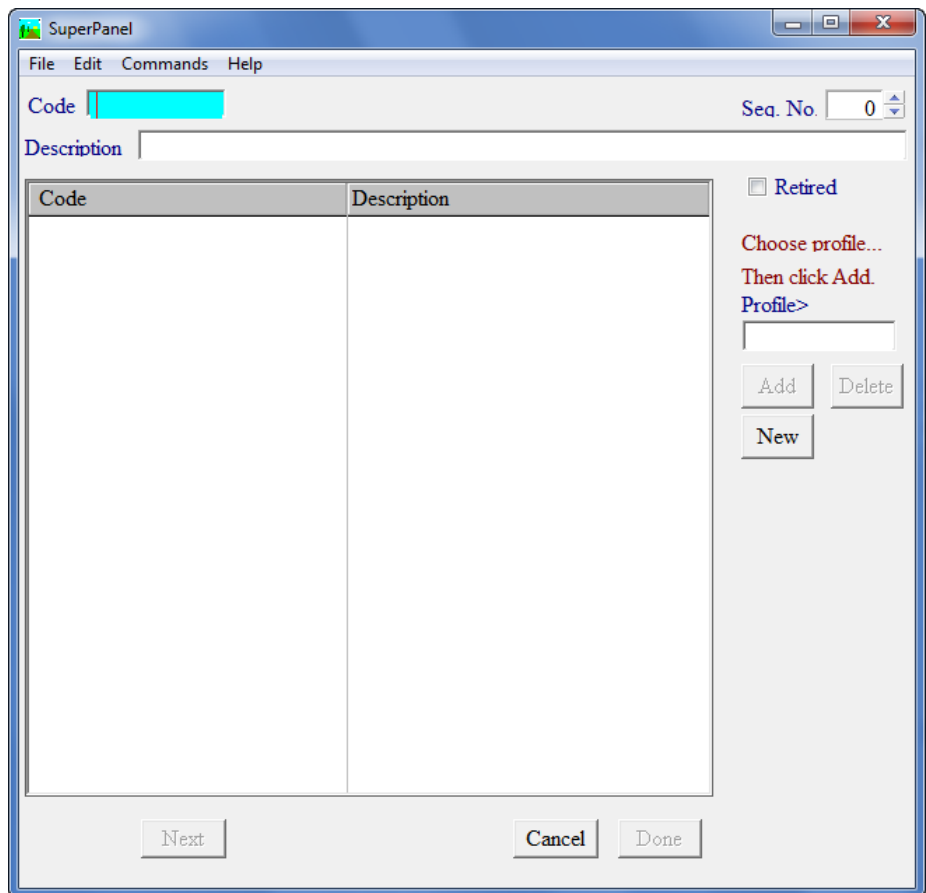
Figure 33 – **Super Panel Definition Window**

Super Panel Window Fields

- **Code** – the User-defined code for the **Super Panel**. This code must be unique.

- **Description** – the User-defined description of the **Super Panel**.

- **Seq. No.** – not used. The sequence on reports is determined by the Profiles or Report Groups depending upon the elements used.

- **Profile>** – used to select the profiles that will be part of this **Super Panel**. Press **CTRL+L** to display entries from the **Profiles Library**. To select a library entry, highlight it and click **Select** or press **ENTER**. You cannot type free in this field. After selecting a profile, it will appear in the **Profile field**. Click **Add** to add the profile to the **Profile List**.

Super Panels Window List Box

- **Profile List** – lists all of the **Profiles** that make up this **Super Panel**.

Super Panels Window Action Buttons

- **Add** – adds the profile in the **Profile>** field to the list.

- **Delete** – deletes the highlighted profile from the list.

- **New** – opens the **Profile Definition Window** and allows the user to create a new Profile.

- **Previous –** advances to previous **Super Panel**.

- **Next** – advances to next **Super Panel**.

- **Cancel** – cancels changes and exits the window.

- **Done** – saves changes and exits window.

Vials Library

Vials are used for Clinical cases only. The Vials Library contains all of the vials that may be used for processing clinical tests on various instruments and analyzers. Entries in the Vials Library are required for each vial that will have a Specimen Label printed for it.

From the **Librarian Window**, select **Vials** from the **Library Menu** to open the **Vials List Window.** Click **New** or **Open** to open the **Vial Definition Window** (Figure 34).

Each entry in this library should have a value entered in the **Code, Description** and **Size in ml.** The **Size in ml** field is a required field, as this value is used to determine the number of vials needed and thus the number of labels required.
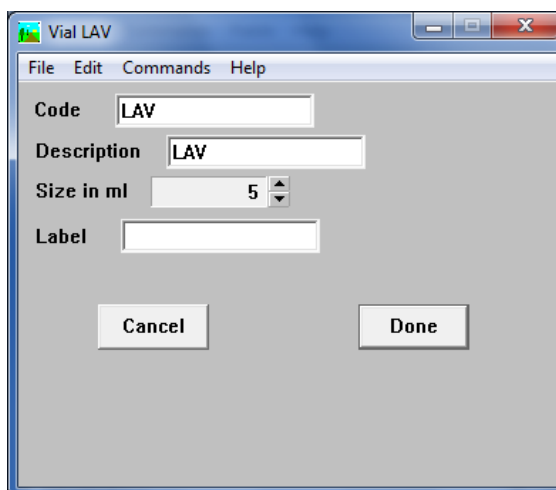
Figure 34 – **Vial Definition Window**

Vials Definition Window Fields

- **Code** – the User-defined code for the **Vial**. This code must be unique.

- **Description** – the User-defined description of the **Vial**.

- **Size in ml** – how many units (ml) this vial can contain.

- **Label** – used to assign a default specimen label to a Vial Definition. Press **CTRL+L** in the **Label** field to choose a **Label**.

Vials Definition Window Action Buttons

- **Cancel** – cancels changes and exits the window.

- **Done** – saves changes and exits the window.

Workstation Library

There are three types of security features in WindoPath: Site Wide, which applies to all Users; Workstation, which applies to specific PCs; and User, which applies to individual User accounts.

The **Workstation Library** allows security features to be applied to specific PCs. This is used in conjunction with Specimen Tracking. Please refer to *Chapter 5 – Case Procedures & Profiles*.

Select *Workstations* from the *Library Menu* to open the **Workstation List Window**. Click **New** or **Open** to open the **Workstation Definition Window** (Figure 35).

Workstation Window
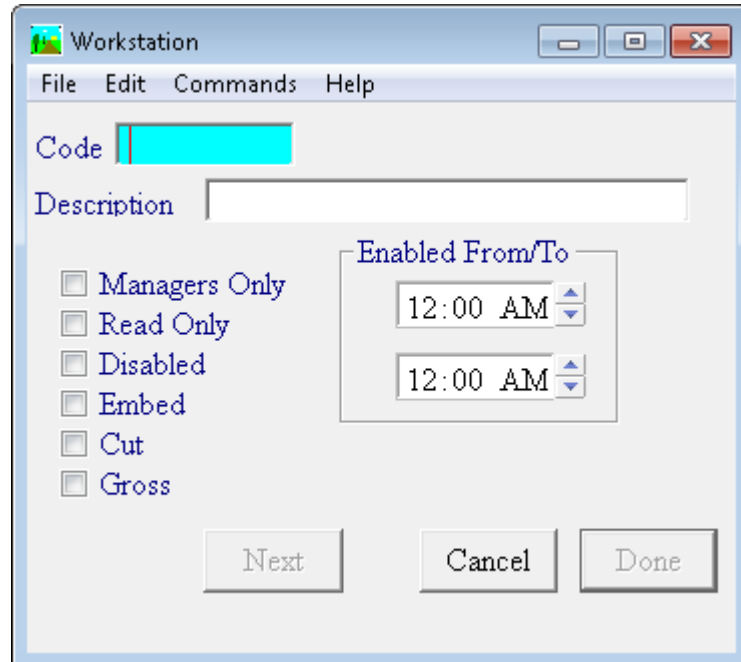
Figure 35 – **Workstation Window**

Workstation Definition Window Fields

- **Code** – the code for the PC. This code must be unique.

- **Description** – the name for the PC.

- **Enabled From/To** – times of day this PC is available to be logged into for WindoPath.

Workstation Definition Window Action Buttons

- **Previous –** advances to the previous **Workstation**.

- **Next** – advances to the next **Workstation**.

- **Cancel** – cancels changes and exits the window.

- **Done** – saves changes and exits the window.

Workstation Definition Window Check Boxes

- **Managers Only** – if this box is checked, only Users with *Manager Privileges* may log into **WindoPath** on this PC.

- **Read Only** – If this box is checked, WindoPath on this PC is displayed in read-only mode. Data in **WindoPath** may not be added, modified or deleted on this PC.

- **Disabled** – if this box is checked, no User may log in to **WindoPath** on this PC.

- **Embed** – if this box is checked, a User may advance the block status of a Profile from Ordered to Embed using the Tracking menu in the Dispatcher window on this PC.

- **Cut** – if this box is checked, a User may advance the block status of a Profile from Embed to Cut using the Tracking menu in the Dispatcher window on this PC.

- **Gross** – if this box is checked, a User may advance the block status of a Profile from Cut to Gross using the Tracking menu in the Dispatcher window on this PC.

Clinical Test Code Library

The Clinical Test Code Library stores all clinical tests (and respective ranges and values) which are later linked to Clinical Procedures and Clinical Profiles.

From the **Librarian Window**, select **Clinical Test Codes** from the **Clinical Menu** to open the **Clinical Test Codes List Window**. Click **New** or **Open** to open the **Clinical Test Code Definition Window** (Figure 36).

Figure 36 – **Clinical Test Code Definition Window**

Clinical Test Code Window Fields

- **Code** – the User-defined code for the test. This code must be unique.

- **Name** – the User-defined name for the test.

- **Instrument** – the instrument on which this test runs. This field is important if you have an instrument interface. If you are unsure of the name of your instrument as used in the interface, please speak with your Psyche Interface person or your Implementation Specialist.

- **Interpretations (+-)** – used for Toxicology cases only. For each test, if the result is equal to or greater than the Cutoff, the result will display on the report as Detected. If the result is less than the cutoff, the result will display on the report as Not Detected. The lab may choose to use different terms other than Detected and Not Detected.

- **CPT4>** – not used.

- **Units** – the unit of measure used for the test.

- **Delta %** – the lab can define the percent of change t when displaying historical results of this test.

- **Abs** – this represents an absolute value of the change (delta) instead of a percent of change.

- **Cutoff** – used for Toxicology cases only. This is amount to which the test result will be compared. For each test, if the result is equal to or greater than the Cutoff, the result will display on the report as Detected. If the result is less than the cutoff, the result will display on the report as Not Detected.

- **Maximum** – used for Toxicology cases only. This is the maximum amount that can be shown for the result of this test. If the result is higher than the maximum, it will display on the report as greater than this amount.

- **Decimals** – allows you to determine how many decimal places you want for the result of each test.

- **Seq #** – determines the order of the tests when using the External Clinical Result Table Format Section.

- **Report Section** – determines the header name for tests using the External Clinical Result Table Format Section.

- **Allowed (commas)** – allows the lab to define acceptable results. If a result does not match one of the entries, it will not be accepted. If there are multiple entries, they must be separated with a comma.

Clinical Test Code Window List Boxes

- **Ranges List Box** – lists all of the ranges your lab has defined for this test.

Clinical Test Code Window Action Buttons

- **Add** – opens the **Clinical Range Definition Window** allowing the user to add a new Range.

- **Delete** – deletes the selected Range from the Range List Box.

- **Previous –** advances to the previous **Clinical Test Code Definition Window**.

- **Next –** advances to the next **Clinical Test Code Definition Window**

- **Cancel –** cancels changes and exits the window.

- **Done –** saves changes and exits the window.

Clinical Test Code Window Check Boxes

- **Lab Supply –** for use with Outreach.

- **Use BLLQ –** this is Below Lower Limits Quantitative. The result is between the cut off value and 20% below that amount. If this box is checked, no result is displayed in the result column but the Interpretation column will say BLLQ.

- **Disallow Order By –** A user will not be allowed to manually order this test.

- **Do not flag as Abnormal –** this allows you to tell WindoPath that not all tests are normal or abnormal. A pregnancy test, for example, if positive, is not abnormal.

Each Clinical Test Code created may have one or more **Clinical Ranges** associated with it. To create a **Clinical Range**, click the **Add button** on the **Clinical Test Code Definition Window** and the **Clinical Range Window** will open. (Figure 37)

Clinical Range Window Fields

- **Range Title** – the User-defined title or name for the range. This will display in the **Ranges List Box**.

- **Range Fields – Normal** – normal low range (numeric). This test result can be equal to or greater than this low range and will be considered **Normal**. If the test result is less than this amount, the result will be **Low**.

- **Range Fields – To** – normal high range (numeric). This test result can be equal to or less than this high range and will be considered **Normal**. If the test result is greater than this amount, the result will be **High**.

- **Range Fields – or Alpha** – normal alphabetic range (i.e. positive or negative). If the result text matches this text, the result will be considered **Normal**. If the result text is anything other than the *Normal Alpha Range* or the *Critical Alpha Range*, it will be considered **Abnormal**.

- **Range Fields – Critical** – critical low range. If the test result is less than the normal low range and greater than or equal to this number, it will be considered **Low**. If the test result is less than this number, it will be considered **Critical Low**.

- **Range Fields – To** – critical high range. If the test result is greater than the normal high range and less than or equal to this number, it will be considered **High**. If the test result is greater than this number, it will be considered **Critical High.**

- **Range Fields – Alpha** – critical alphabetic range. If the result text matches this text, the result will be considered **Critical.** If the result text is anything other than the *Normal Alpha Range* or the *Critical Alpha Range*, it will be considered **Abnormal**.

Figure 37 – **Clinical Range Window**

- **Sex** – use this to determine which range should be used based upon the patient's sex. Normal test results can be different depending upon the sex of the patient.

- **Low Age** – use this to determine which range should be used based upon the patient's age. Normal test results can be different depending upon the age of the patient. This is the lowest age for this range.

- **High Age** – use this to determine which range should be used based upon the patient's age. Normal test results can be different depending upon the age of the patient. This is the highest age for this range.

- **Race** – not used.

- **Species** – not used.

- **Fasting Status** – not used.

- **Menstrual Stage Low** – not used.

- **Menstrual Stage High** – not used.

- **Diet** – not used.

- **Range Text** – not used.

- **Sequence Number** – the order in which this range is checked.

For processing clinical cases in WindoPath, Clinical Test Codes should be built for all tests that are included in Normal Profiles, Manual Differential Profiles, Manual Differential Morphology Profiles and tests that are processed as Individual Orderables. Examples of **Common Clinical Test Codes** are listed below:

- RBC, Red Blood Cell Count (Normal Profiles)

- SEGS, Segmented Neutrophils (Manual Differential Profiles)

- MICRO, Microcytosis (Manual Differential Morphology Profiles)

- CL, Chloride Serum (Individual Orderables)

Library Building Reference Chart

This Library…	Is accessed using CTRL+L from these fields/boxes… or from this menu item…	In this Window…
Charges	Charge Code	Source Definition Window (Library)
	Charge	Profile Window (Library)
	Workload Code	Procedure Window (Library)
Clinical Test Codes	Clinical Code	Procedure Window (Library)
CPT	CPT Code	Workload Definition Window (Library)
Diagnosis	Diagnosis tab	Accession Window
	Diag tab	Quick Case Window
	Diagnosis/Interpretation	Add-On Window
	Diagnosis/Interpretation	Procedure Window
	Diagnosis Code	Source Definition Window (Library)
	Diagnosis drop-down menu	Source Definition Window (Library)
	Diagnosis drop-down menu	Paragraph Definition Window (Library)
	Diagnosis Code	Procedure Window (Library)
ICD9 Codes	Add ICD9 Code	Quick Case Window – Add/Delete Menu
	ICD9s	Diagnosis Definition Window (Library)
Paragraphs	Case Pre-Diagnosis	Accession Window – Case Menu
	Gross tab	Quick Case Window

	Micro tab	Quick Case Window
	D Note tab	Quick Case Window
	Pre Diag tab	Quick Case Window
	Spec Ins tab	Quick Case Window
	Sup Rep tab	Quick Case Window
	C Note tab	Quick Case Window
	Reason tab	Quick Case Window
	Priv tab	Quick Case Window
	Notes tab	Quick Case Window
	Correction Reason	Pap Case Window
	Note	Add-On Window
	Communicated	Add-On Window
	Consult Sent	Consult Window
	Consult Received	Consult Window
	Micro drop-down menu	Diagnosis Definition Window (Library)
	Gross drop-down menu	Source Definition Window (Library)
	Microscopic drop-down menu	Source Definition Window (Library)
Pathologists (Human Resources)	Pathologist	Accession Window – Case Tab
	Path	Quick Case Window
	Grosser	Quick Case Window – Modify Menu
	Pathologist	Add-On Window
	Pathologist	Pap Case Window
	Pathologist	Log Audit Window
	Pathologist	User Window (Human Resources)
	Pathologist	Report Definition Window (Formatter)
Patients (Human Resources)	Name	Accession Window – Case Tab
	Patient	Log Audit Window
Phrases – Add-on Box	Add-on Phrase drop-down menu	Workload Definition Window (Librarian)
Phrases – Additional Data Box	Additional	Coded Phrase Window (Library)
Phrases – Audit Field Name Box	Field Name	Log Audit Window
Phrases – Clinical Information Box	Clin Info	Accession Window – Specimen Tab
	C Info tab	Quick Case Window
	S Info tab	Quick Case Window
Phrases – Comment Box	Comment	Accession Window – Visit Tab
	Comment	Accession Window – Specimen Tab

	C Com tab	Quick Case Window
	S Com tab	Quick Case Window
	Case Comment drop-down menu	Source Definition Window (Library)
Phrases – Company Type Box	Type	Yellow Pages Window (Library)
Phrases – Consult Type Box	Consult Type	Consult Window
Phrases – Credit Box	Person to Credit	Workload Definition Window (Library)
Phrases – Degree Box	Degree	Physician Window (Human Resources)
Phrases – Extra One Box	Extra Field 1	Accession Window – Visit Tab
Phrases – Extra Text Box	Extra Text Box (source modifier)	Accession Window – Specimen Tab
Phrases – Extra Two Box	Extra Field 2	Accession Window – Visit Tab
Phrases – Identifier Box	Identifier	Add-On Window
Phrases – Instrument Box	Instrument	Profile Window (Library)
	Instrument	Clinical Test Code Window (Library)
Phrases – Insurance Balance Type Box	Balance Type	Insurance Window
Phrases – Insurance Priority Box	Priority	Insurance Window
Phrases – Insured By Box	Insured By	Accession Window – Patient Tab
	Insured By	Patient Window (Human Resources)
Phrases – Keywords Box	Highlight Keywords	Quick Case Window – Reporting Menu
Phrases – Last Period Box	LstMP	Accession Window – Case Tab and Pap Case Window
Phrases – Location Box	Location	Accession Window – Visit Tab
	Assign to Location	Physician Window (Human Resources)
	Location	Report Definition Window (Formatter)
Phrases – Marital Status Box	Marital Status	Billing Window
Phrases – Miscellaneous Box	*Underscores (_) in text*	Quick Case Window
Phrases – Organisms Box	**Organ button**	Pap Case Window
Phrases – Pap Diagnosis Box	Diagnosis/Interpretation Box	Pap Case Window
Phrases – Patient Type Box	Type	Accession Window – Visit Tab
	Type	Visit Window (Human Resources)
	Patient Type	Report Definition Window (Formatter)

Phrases – Pickup Message Box	Not Used	
Phrases - Printer Box	Not Used	
Phrases - Procedure Box	Procedure	Source Definition Window (Library)
Phrases - Procedure Instructions Box	Not Used	
Phrases – Procedure Slide Label Box	Slide Label	Procedure Window (Library)
Phrases - Profile Comment Box	Internal Comment	Profile Window
	Internal Comment	Procedure Window
Phrases - Profile Designation Box	Designation drop-down menu	Procedure List Window
	Designation drop-down menu	Profile Window (Library)
	Designation drop-down menu	Profile Order Window (Source Definition Window - Library)
Phrases - Profile Instructions Box	Instructions	Profile Window
	Instructions	Procedure Window
Phrases - Profile Status Box	Status drop-down menu	Procedure List Window
	Status drop-down menu	Procedure Window (Library)
	Status drop-down menu	Procedure Window
Phrases - Reason Box	Reason (Slide adequacy)	Pap Case Window
Phrases – Recommendations Box	**Recom button**	Pap Case Window
Phrases - Relation Box	Relation	Insurance Window
Phrases - Schedule Box	Schedule	Fee Window (Workload Definition Window - Library)
	Fee	Yellow Pages Window (Library)
	Fee Sched	Physician Window (Human Resources)
Phrases – Security Code Box	Security Code	Accession Window – Patient Tab
	Security Code	Patient Window (Human Resources)
Phrases – Severity Box	Severity	Coded Phrase Window (Library)
Phrases - Sex Box	Sex	Accession Window - Patient Tab
	Sex	Patient Window (Human Resources)
	Appropriate Sex	Source Definition Window (Library)
Phrases – Sign Out Location Box	Sign Out Location	Quick Case Window - Modify Menu
	Sign Out Loc	Report Definition Window (Formatter)

Phrases – Source Category Box	Category	Source Definition Window (Library)
Phrases – Special Flag Box	Special Flags	Quick Case Window - Modify Menu
Phrases - Specialty Box	Specialty	Physician Window (Human Resources)
Phrases - Status Box	C. Status	Accession Window - Case Tab
	Status	Pap Case Window
Phrases - Title Box	Title	Pathologist Window (Human Resources)
Phrases – User Fields Box	User 1- 3	Accession Window – all tabs
	User Extra	User Window (Human Resources)
Phrases - User Site Box	Site	Report Definition Window (Formatter)
Phrases - Work Group Box	Work Group	Procedure Window (Library)
	Wrk Grp drop-down menu	Procedure List Window
	Work Group drop-down menu	Procedure Window
Physicians (Human Resources)	Admitter	Accession Window - Visit Tab
	Consultor	Accession Window - Visit Tab
	Submitter	Accession Window - Case Tab
	Physicians	Quick Case Window – Modify Menu
	Submitter	Pap Case Window
	Consultor	Consult Window
	Submitter	Log Audit Window
	Physician	User Window (Human Resources)
	Group	Physician Fax Window (Human Resources)
	Physician	Report Definition Window (Formatter)
	Phys. Loc	Report Definition Window (Formatter)
	Grp. Phys	Report Definition Window (Formatter)
	Also print to physician location	Report Definition Window (Formatter)
Procedures	Procedure	Profile Window (Library)
	Procedure drop-down menu	Procedure List Window
Profiles	Profile drop-down menu	Procedure List Window
	Profile Type	Source Definition Window (Library)
	Profile Order Window	Source Definition Window (Library)

SNOMED Codes	SNOMEDs	Diagnosis Definition Window (Library)
Source	Source	Accession Window - Specimen Tab
	Source	Reflex Test Window (Library)
	Source	Report Definition Window (Formatter)
Tables	Add Table	Quick Case Window – Add/Delete Menu
	Table drop-down menu	Source Definition Window (Library)
	Table drop-down menu	Diagnosis Definition Window (Library)
	Table drop-down menu	Procedure Window (Library)
Users (Human Resources)	Tech	Accession Window - Case Tab
	Tech	Accession Window - Specimen Tab
	Acces (Accessioner)	Pap Case Window
Yellow Pages	Hospital	Consult Window
	Carrier	Insurance Window
	Practice	User Window (Human Resources)
	Yellow Pages	Physician Fax Window (Human Resources)
	Owner	Yellow Pages Window (Library)
Zip Codes	City	Accession Window - Patient Tab
	ZIP	Accession Window - Patient Tab
	City	Billing Window
	ZIP	Billing Window
	City	Patient Window (Human Resources)
	ZIP	Patient Window (Human Resources)
	City	Physician Window (Human Resources)
	ZIP	Physician Window (Human Resources)
	City	Physician Fax Window (Human Resources)
	ZIP	Physician Fax Window (Human Resources)
	City	Yellow Pages Window (Library)
	ZIP Code	Yellow Pages Window (Library)

Chapter 12 – The Archives

Although the **Archives** can be used to look up current Cases, it is intended to be used to look up Cases that are no longer active and therefore are not loaded into memory when **WindoPath** starts up. Once an archived (inactive) Case has been looked up from the **Archives**, it remains loaded in the computer's memory until you exit **WindoPath**.

Case Retrieval Window

The **Case Retrieval Window** allows looking up Cases by many different criteria, including Social Security Number, Date of Birth, Specimen Source or Diagnosis text.

Depending on the criteria specified for the database search, the message **This query has no index field specified and may take a long time. Proceed** may be displayed. Click **Yes** to continue the database search. Click **No** to cancel the operation.

The **Case Retrieval Window** (Figure 1) is opened by clicking **Archives** on the **Dispatcher Window.**

Case Retrieval Window Fields

- **Case No.** – the Case number. To search for a single Case, enter the full Case number (example: S2008-000001). To search for multiple Cases by partial Case number, use the percentage sign (%) to define variable data. For example, to search for all Case numbers containing 555, enter %555%.

- **Submitter >** – the Case's submitting Physician. Press **CTRL+L** to display entries from the **Physicians Library**. Highlight the desired Physician and click **Select**.

- **Patholog >** – the Pathologist assigned to the Case. Press **CTRL+L** to display entries from the **Pathologist Library**. Highlight the desired Pathologist and click **Select**.

- **Signer >** – the Pathologist who signed out the Case. Press **CTRL+L** to display entries from the **Pathologist Library**. Highlight the desired Pathologist and click **Select**.

- **Diag Typist** – the User who typed the Diagnosis. (**WindoPath** v3.1 and lower only)

Figure 1 – **Case Retrieval Window**

- **Histo Tech** – the User who processed procedures on the Case in the **Procedure List Window**.

- **Tech** – the User who accessioned the Case.

- **Case Stat** – text from the C. Status field on the **Accession Window** – **Case tab**.

- **Sp. Flag** – text from the Flag Special drop-down menu on the **Quick Case Window**.

- **MedRecNo** – the Patient's Medical Record Number. To search by partial Medical Record Number, use the percentage sign (%) to define variable data. For example, to search for all Medical Record Numbers containing 123, enter %123%.

- **Name** – the Patient's name. To search by partial name, use the percentage sign (%) to define variable data. For example, to search for all Patient names containing MARY, enter %MARY%.

- **SSN** – the Patient's Social Security Number. To search by partial Social Security Number, use the percentage sign (%) to define variable data. For

example, to search for all Social Security Numbers containing 123, enter %123%.

- **Medicare** – the Patient's Medicare Number. To search by partial Medicare Number, use the percentage sign (%) to define variable data. For example, to search for all Medicare Numbers containing 123, enter %123%.

- **Account –** the Visit Account Number. To search by partial Account Number, use the percentage sign (%) to define variable data. For example, to search for all Account Numbers containing 123, enter %123%.

- **Admitter > –** the Visit's admitting Physician. Press **CTRL+L** to display entries from the **Physicians Library**. Highlight the desired Physician and click **Select**.

- **Location –** the Visit location.

- **Type –** the Visit type.

- **Consultor > –** the Visit's consulting Physician. Press **CTRL+L** to display entries from the **Physicians Library**. Highlight the desired Physician and click **Select**.

- **AKA (Also Known As) –** alternate name for the Patient (merged Patients only). To search by AKA, use the percentage sign (%) to define variable data. For example, to search for all AKA names containing SMITH, enter %SMITH%.

- **Profile** – a profile on a case.

- **Procedure –** a procedure on a case.

- **ICD –** an ICD code associated with a case.

- **SNOMED** – a SNOMED code associated with a case.

- **Seq. No.** – the sequence number associated with a Profile.

- **Client** – pulls from the Yellow Pages Library.

- **Source >** – the Specimen Source. Press **CTRL+L** to display entries from the **Source Library**. Highlight the desired Source and click **Select**.

- **Diag** – the Diagnosis text. To search by partial Diagnosis text, use the percentage sign (%) to define variable data. For example, to search for all Diagnoses containing the word carcinoma, enter %carcinoma%. NOTE: Diagnosis text searches can be time consuming and resource intensive.

Dates:

- **Received (From/To)** – the Case's Received Date. To search for a single Received Date, enter the date in the **From field**. To search for a range of Received Dates, enter the earliest date in the **From field** and the latest date in the **To field**.

- **Collected (From/To)** – the Case's Collection Date. To search for a single Collection Date, enter the date in the **From field**. To search for a range of Collection Dates, enter the earliest date in the **From field** and the latest date in the **To field**.

- **Signed (From/To)** – the Case's Sign Out Date. To search for a single Sign Out Date, enter the date in the **From field**. To search for a range of Sign Out Dates, enter the earliest date in the **From field** and the latest date in the **To field**.

- **Autopsy (From/To)** – the Case's Autopsy Date. To search for a single Autopsy Date, enter the date in the **From field**. To search for a range of Autopsy Dates, enter the earliest date in the **From field** and the latest date in the **To field**.

- **Death (From/To)** – the Patient's Death Date. To search for a single Death Date, enter the date in the **From field**. To search for a range of Death Dates, enter the earliest date in the **From field** and the latest date in the **To field**.

- **Report (From/To)** – the Case's Report Date. To search for a single Report Date, enter the date in the **From field**. To search for a range of Report Dates, enter the earliest date in the **From field** and the latest date in the **To field**.

- **Admit Date/To** – the Visit's Admit Date. To search for a single Admit Date, enter the date in the Admit Date field. To search for a range of Admit Dates, enter the earliest date in the Admit Date field and the latest date in the To field.

- **Dischrgd Date** – the Visit's Discharged Date. To search for a single Discharged Date, enter the date in the **Dischrgd Date field**. To search for a range of Discharged Dates, enter the earliest date in the **Dischrgd Date field** and the latest date in the **To field**.

- **DOB/To** – the Patient's date of birth. To search for a single date of birth, enter the date in the DOB field. To search for a range of birth dates, enter the earliest date in the DOB field and the latest date in the To field.

- **DOD/To** – the Patient's date of death. To search for a single date of death, enter the date in the **DOD field**. To search for a range of death dates, enter the earliest date in the **DOD field** and the latest date in the **To field**.

Case Retrieval Window List Box

- **Case List Box** – lists the Case number, Status (Active or Inactive), Patient name, Medical Record Number, Account number, Source, Diagnosis, DOB, Collection Date and Sequence Number of all Cases matching the entered lookup criteria. Double clicking any Case in the list opens the **Quick Case Window** or **Pap Case Window** for that Case.

Case Retrieval Window Action Buttons

- **Clear** – clears all fields of the **Case Retrieval Window**.

- **Find** – finds all Cases matching the entered lookup criteria and displays them in the **Case List Box**.

- **Find+** – finds all Cases matching the entered lookup criteria and opens a **Case List Window** listing each Case. Cases may be batch printed or faxed from the **Case List Window**. If the site wide preference **Only latest corrected case in case list window** is set to **True**, clicking **Find+** will load only the most recent corrected case. Clicking **Find** will load all versions of the case.

- **Done** – closes the **Case Retrieval Window**.

Case Retrieval Window Menus

Retrieval Menu

- *Accession* – **CTRL+N** – opens the **Accession Window** for the Case highlighted in the **Case List Box.**

- *Open Case List* – opens the **Case List Window** for the Case(s) listed in the **Case List Box**.

- *Open Procedure List* – opens the **Procedure List Window** for Case(s) listed in the **Case List Box**.

- *Print Selected Cases* – opens the standard print window so the Cases selected in the **Case List Box** can be printed. If no Cases are selected, reports will be printed for all Cases listed.

- *Preview* – opens the standard print window so the Cases selected in the **Case List Box** can be previewed.

- *Converted Cases Only Toggle* – restricts the database search to include only past Cases that were inserted into **WindoPath** through a data conversion program.

- *Look up where* **–** allows manual entry of an SQL statement for database lookup.

- *Look up bad cases* – *for Psyche use only*.

- *Look up by case number range* – allows the user to specify a range of case numbers.

- *Set percentage of cases to retrieve* – allows the user to specify a percentage of retrieved cases. For example, if 250 cases match the specified criteria and the percentage is set to 10, then only 25 cases will be retrieved.

- *Specify diagnosis data* **–** allows the user to retrieve cases based on diagnosis initials and dates for all stages of the diagnosis.

- *Specify synoptic data* – allows the user to enter items that pertain to rows stored in the Synoptic Table. They include Section, Subsection, Item Name, Datum1, Datum2, Datum3 and Modifier.

- *Maximum Number of Cases Retrieved* – opens an entry box to specify the maximum number of Cases that may be retrieved by any query. For example, if the maximum number of Cases is set to 100, only the first 100 Cases matching the entered lookup criteria will be displayed in the **Case List Box**, regardless of how many Cases in the database actually meet the specified lookup criteria.

- *Link Patients* – not used.

- *Merge Patients* – opens the **Merge Patients Window** (Figure 2).

- *Merge Visits* – opens the **Merge Visits Window** (Figure 3).

- *Merge Others* – opens the **Merge Others Window** (Figure 4).

- *Show HIS Interface Matches* **–** works with User Preference 85, **Allow Matching Patient from HIS**. This menu item is used to view which patients were matched by the HIS Interface and allows the User to remove any unwanted matches.

- *Save Search Criteria* – opens the standard file selection window to save the current lookup criteria. Type a name for the query (example: P2008.txt for a query to retrieve all P Cases for 2008) and click **Open**.

- *Restore Search Criteria* – opens the standard file selection window to open a previously stored query. Highlight the desired query file and click **Open**. The stored lookup criteria will be entered in the appropriate fields of the **Case Retrieval Window**.

- *Restore and Retrieve* – opens the standard file selection window to open a previously stored query. Highlight the desired query file and click **Open**. The stored lookup criteria will be entered in the appropriate fields of the **Case Retrieval Window** and the corresponding Cases will be listed in the **Case List Box**.

- *Restore, Retrieve and Open* – opens the standard file selection window to open a previously stored query. Highlight the desired query file and click **Open**. The stored lookup criteria will be entered in the appropriate fields of the **Case Retrieval Window**, the corresponding Cases will be listed in the **Case List Box** and the **Case List Window** listing each Case will open.

- *Retrieve and Open* – finds all Cases matching the entered lookup criteria and opens a **Case List Window** listing each Case. Cases may be batch printed or faxed from the **Case List Window**.

Appends Menu

The **Appends Menu** in the Case **Retrieval Window** lists additional toggle menu items that are used for filtering purposes.

- *Case Add-ons*
- *Case Add-on Images*
- *Case Documents*
- *Consults*
- *Clinical Specimens*
- *Completed*
- *Payment Due*
- *Specimen Add-Ons*
- *Specimen Add-on Images*
- *Specimen Images*
- *Synotpics*
- *Tumor Staging*
- *Place Images in Folder*
- *Open Image*

Merging Patients

Merging Patients selects one Patient record to *keep* and one Patient record to *delete*. Once a Patient record has been deleted, it cannot be retrieved. Only merge Patients if you are sure you wish to *delete* the duplicate Patient record.

Figure 2 – **Merge Patients Window**

The Patient merge feature allows you to delete duplicate Patient records while transferring Visits and Cases to the correct Patient record. Click **Archives** and select *Merge Patients* from the *Retrieval Menu* to open the **Merge Patients Window** shown in Figure 2. In the **Enter Patient Name field**, enter the full or partial name of the Patient with the duplicate records you wish to merge. Click **Find** to look up the Patient(s).

The **Merge Patients Window** contains two list boxes: the **Patient to Transfer Cases FROM: List Box** and the **Patient to Transfer Cases TO: List Box**. Patients are listed in the format *Patient name, Medical Record Number, Date of Birth and Cases* (number of Cases).

In the **Patient to Transfer Cases FROM: List Box**, highlight the Patient you wish to DELETE. In the **Patient to Transfer Cases TO: List Box**, highlight the Patient you wish to KEEP. Click **Cancel** to cancel the operation. Click **Merge** to merge the Patient records. Each Case and corresponding Visit will be moved to the remaining Patient.

Click **Done** to close the **Merge Patients Window**.

If you wish to merge Patients with different last names, open the **Accession Window** and look up the Patient you wish to DELETE. In the Name field, change the last name to the last name of the Patient you wish to KEEP. Press **CTRL+S** to save your changes. You can now look up the Patients to be merged as described above.

Merging Visits

The Visit merge feature allows you to delete duplicate Visit records while transferring Cases to the correct Visit record. Click **Archives** and select *Merge Visits* from the *Retrieval Menu* to open the **Merge Visits Window** shown in Figure 3. In the **Enter Medrec No. field**, enter the Medical Record Number of the Patient whose Visit records you wish to merge. Click **Find** to look up the Patient.

Figure 3 – **Merge Visits Window**

The **Merge Visits Window** contains two list boxes: the **Visit to Transfer Cases FROM: List Box** and the **Visit to Transfer Cases TO: List Box**. Visits are listed in the format *Account Number, Date, Location and Type.*

In the **Visit to Transfer Cases FROM: List Box**, highlight the Visit you wish to DELETE. In the **Visit to Transfer Cases TO: List Box**, highlight the Visit you wish to KEEP. Click **Cancel** to cancel the operation. Click **Merge** to merge the Visit records. Each Case from the deleted Visit will be moved to the remaining Visit.

Click **Done** to close the **Merge Visits Window**.

Merging Other

Merging Pathologists

The Pathologist merge feature allows you to transfer Cases from one Pathologist record to another. Click **Archives** and select *Merge Others* from the *Retrieval Menu* to open the **Merge Others Window** shown in Figure 4. The drop-down menu displays Pathologist by default.

The **Merge Others Window** contains two list boxes: the **FROM: List Box** and the **TO: List Box**. Pathologists are listed in the format *Code, Count (number of Cases) and Description (name)*.

In the **FROM: List Box**, highlight the Pathologist you wish to transfer Cases FROM. In the **TO: List Box**, highlight the Pathologist you wish to transfer Cases TO. Click **Merge** to merge the Pathologist records. The prompt **This will delete Pathologist xxx. OK** will be displayed. Click **No** to cancel the operation. Click **Yes** to continue the merge. Each Case from the FROM Pathologist will be moved to the TO Pathologist. When the merge is complete, the message **Items have been merged. Currently open windows will not reflect the change** will be displayed. Click **OK** to return to the **Merge Others Window**.

Click **Done** to close the **Merge Others Window**.
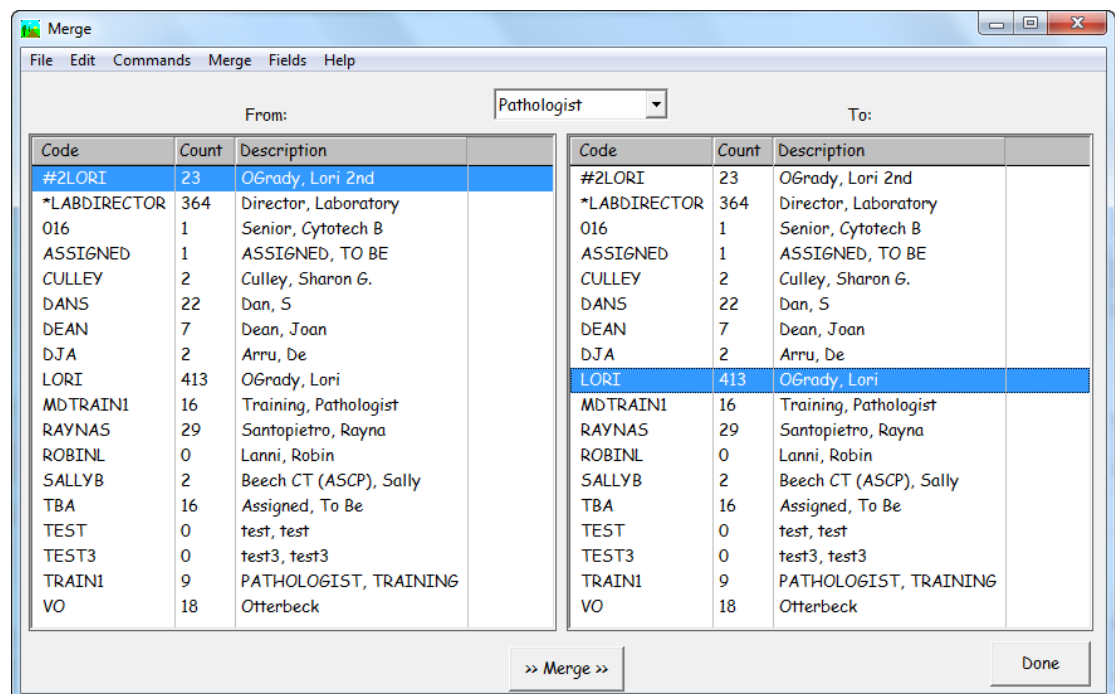
Figure 4 - **Merge Others Window, Merge Pathologist**

Merging Physicians

The Physician merge feature allows you to transfer Cases from one Physician record to another. Click **Archives** and select *Merge Others* from the *Database Menu* to open the **Merge Others Window** shown in Figure 4. The drop-down menu displays Pathologist by default. Click the down arrow and select Physician from the list.

The **Merge Others Window** contains two list boxes: the **FROM: List Box** and the **TO: List Box**. Physicians are listed in the format *Code, Count (number of Cases) and Description (name)*.

In the **FROM: List Box**, highlight the Physician you wish to transfer Cases FROM. In the **TO: List Box**, highlight the Physician you wish to transfer Cases TO. Click **Merge** to merge the Physician records. The prompt **This will delete Physician (Code number) OK** will be displayed. Click **No** to cancel the operation. Click **Yes** to continue the merge. Each Case from the FROM Physician will be moved to the TO Physician. When the merge is complete, the message **Items have been merged.**

Currently open windows will not reflect the change will be displayed. Click **OK** to return to the **Merge Others Window**.

Click **Done** to close the **Merge Others Window**.

When merging Physicians, the Physician in the **FROM: List Box** is not deleted from the database. Because this Physician no longer has any Cases, you can delete the Physician from the database if you wish. Refer to the section entitled **Physician List Window** in *Chapter 10 – Human Resources* for more information about deleting a Physician.

Merging Source Definitions

The Source Definition merge feature allows you to delete duplicate Source Definitions. Click **Archives** and select *Merge Others* from the *Database Menu* to open the **Merge Others Window** shown in Figure 4. The drop-down menu displays Pathologist by default. Click the down arrow and select Source Definition from the list.

The **Merge Others Window** contains two list boxes: the **FROM: List Box** and the **TO: List Box**. Source Definitions are listed by code.

In the **FROM: List Box**, highlight the Source Definition you wish to DELETE. In the **TO: List Box**, highlight the Source Definition you wish to KEEP. Click **Merge** to merge the Source Definition records. The prompt **This will delete Source Definition xxxx. OK** will be displayed. Click **No** to cancel the operation. Click **Yes** to continue the merge. Each Specimen with the first Source will be updated with the second Source. When the merge is complete, the message **Items have been merged. Currently open windows will not reflect the change** will be displayed. Click **OK** to return to the **Merge Others Window**.

Click **Done** to close the **Merge Others Window**.

Matching Patients Window

The **Matching Patients Window** (Figure 5) displays a list of Patients with matching criteria that may be candidates for linking or merging.

Look up a Patient by Medical Record Number or by name in the **Accession Window**. The Patient is loaded into the **Patient tab**. Select *Show Matching Patients* (**CTRL+ALT+M**) from the *Patient Menu*.

Matching Patient Criteria

A match will be displayed if another Patient:

- Has the same Social Security Number.

- Has the same last name and the same date of birth.

- Has the same Soundex code and the same date of birth.

- Has the same street address and the same date of birth.

NOTE: Match criteria can be modified by preference.

If there is at least one match, the **Matching Patients Window** opens. The upper list box displays the Patient and any existing links to the Patient. The lower list box displays all potential matches.

If none of the potential matches are true matches, click **Done**.

If there is a match, you can either link the Patients or merge the new Patient into the current Patient.

*Figure 5 – ***Matching Patients Window***

Matching Patient Window Fields

- *Select Demographic* – drop-down menu displays 3 hard-coded demographic types; Medical Record Number, Name and SSN.

- *Demographic Value* – free text field adjacent to the Select Demographic Field where the User may specify a value for the type of demographic selected.

Matching Patient Window Action Buttons

- *Link* – allows 2 or more Patient records to be linked to one another. All existing Patient records are preserved; none are ever deleted. Both Patients will now appear in the upper list box of linked Patients. If the Patient linked to is also linked to other Patients, those Patients will also appear in the upper list box.

- *Unlink* – allows the User to **un-link** previously linked Patient records. Click **Unlink**. Respond **Yes** to the prompt **Unlink selected patient from ALL links**. The unlinked Patient(s) will appear in the lower list box.

- *Merge Up (Transfer all cases from the Patient selected in the lower list box TO the patient selected in the upper list box and then remove that patient from the database)* – the Patient selected in the bottom list box titled **Select Patient List Box** will merge into the Patient selected in the top list box titled **Existing Links**. Upon clicking **Merge Up,** a confirmation prompt will appear **Merge bottom patient into top patient**. Select **YES.** A second confirmation prompt will appear *Delete Medical Record Number _____ LAST NAME, FIRST NAME*. Select **Yes** and the Patients will merge and the Patient listed in the bottom list box will be deleted. Deleted Cases cannot be retrieved.

- *Merge Down (Transfer all cases from the Patient selected in the Upper list box TO the patient selected in the Lower list box and then remove that patient from the database)* – the Patient selected in the top list box titled **Select Existing Links** will merge into the Patient selected in the bottom list box titled **Select Patient**. Upon clicking **Merge Down,** a confirmation prompt will appear **Delete Medical Record Number _____ LAST NAME, FIRST NAME**. Select **Yes** and the Patients will merge and the Patient listed in the top list box will be deleted. Deleted Cases cannot be retrieved.

- *Add Match* – The User may use this button to search for Patients to be linked or merged that do not appear in the **Matching Patient Window's** list boxes by default. The User selects a demographic type in the **Select Demographic Drop-down Menu** and then enters a specific value in the adjacent **Demographic Value Field**, then the User clicks **Add Match**.

- *History* – Opens the History Window for the currently highlighted Patient.

- *Done* – closes the **Matching Patient Window**.

Chapter 13 – The Formatter

Formatter Window

The **Formatter Window** is used to design Report and Label formats.

The **Page Layout button** allows the User to set system wide default fonts.

A Report Format consists of three parts: Mastheads, Fields and Sections. Mastheads are a bitmap file that typically contains graphics and the laboratory's name and address. Fields include demographic information such as Case number and Patient name. Sections include the text that makes up the body of the report, such as Gross Description and Diagnosis.
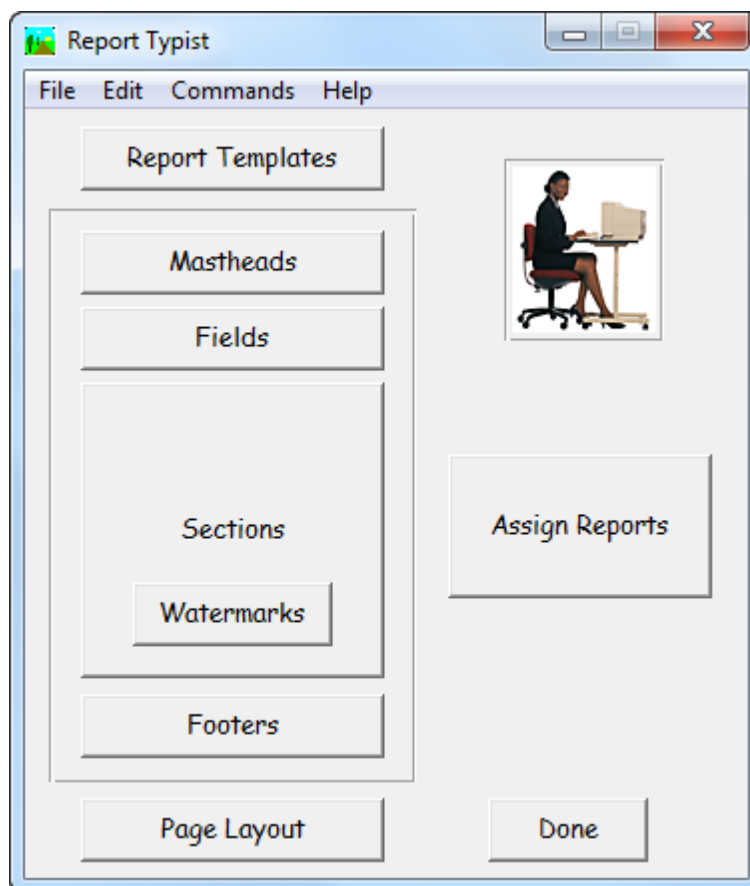
Figure 1 – **Formatter Window**

Once a set of Mastheads, Fields and Sections have been created, Report Templates are designed. Each Report Template consists of one Masthead, one set of Fields and one set of Sections. For example, you can create a Pap Report Template with a Cytology Department masthead, a set of fields that includes the name of the Cytotech who screened the Case and a set of sections that includes Adequacy and Categorization. The Surgical Report Template would use different information.

Finally, Report Definitions are created using the Report Templates. Report Definitions determine which Report Template will be used to print a specific Case report based on different criteria. For instance, different Report Definitions can be defined based on Pathologist, Physician or Sign-out Date. An unlimited number of Report Definitions can be created.

Click **Formatter** in the **Dispatcher Window** to open the **Formatter Window** (Figure 1).

Page Layout

Before any Report or Label Formats are created, you should first define the page margins and any system–wide default fonts. The **Page Layout button** allows the User to set system-wide default fonts for various parts of every Report Format, unless otherwise defined in specific templates.

Click **Page Layout** on the **Formatter Window** to open the **Page Layout Window** (Figure 2).

To define default page margins, enter values in the **Right, Left, Top** and **Bottom** Fields.

Clicking on any of the **Font buttons** in the **Page Layout Window** opens the standard **Font Definition Window** where the **Font, Font Style** and **Font Size** can be defined.
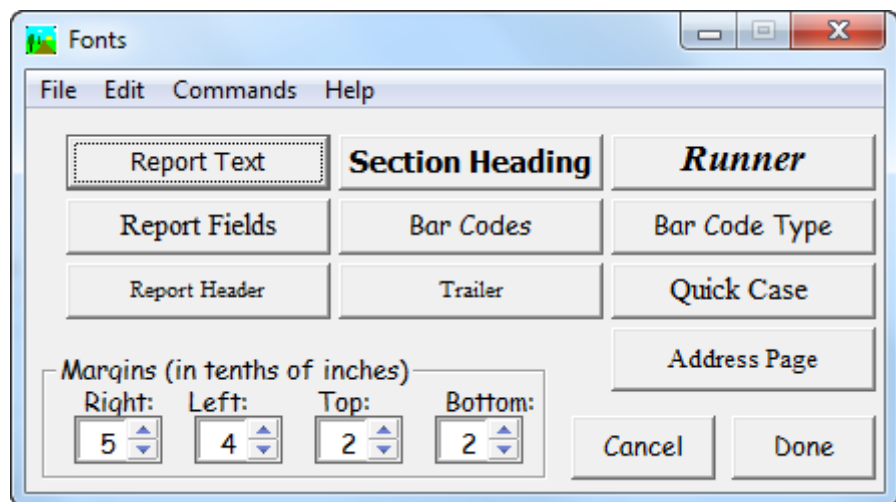
Figure 2 – **Page Layout Window**

Page Layout Font Buttons

- **Report Text** – the text displayed under each Section Heading in the body of the report.

- **Report Fields** – the text displayed in the Fields Section on each Report Template.

- **Report Header** – if certain preferences are set, the Report Header is the small text that is displayed in the top margin of the report above the Masthead, including patient name and case number.

- **Section Heading** – the text displayed above each section in the body of the report.

- **Bar Codes** – if using bar codes, the font settings that will be used for each bar code.

- **Trailer** – if certain preferences are set, the Report Trailer is the small text that is displayed in the bottom margin of the report including case number, patient name, date and page number.

- **Runner** – if Preference S107 (print runners at right of reports) is set to **True** and the Report Title is populated in the Report Definitions, the text that is displayed down the Right Margin of the report.

- **Bar Code Type** – opens a window to select which **Type** of bar code will be used (i.e. code 128 or 39).

- **Quick Case** – the default viewing font when typing in any of the Quick Case Window tabs. This font will not display anywhere on the report itself.

- **Address Page** – when batch printing sorted by Submitter Location or Group, an Address Page listing the Physician's name and address as specified in **Human Resources** prints with each Physician's batch. The preference S17, **print physician address page on reports by submitter**, must be set to **True**.

The **Font Style List** includes *Regular*, *Bold*, *Italic* and *Bold Italic*, depending on the font selected in the **Font List**. For normal text, select *Regular*.

The **Size List** displays the available point sizes for the font selected in the **Font List**. For normal text, it is recommended that you choose a small sized font to produce a desirable report. A size of 10 points usually works well. For Section Headings, you might want to select a somewhat larger font and *Bold* to make them stand out.

Setting Margins

The **Margins fields** in the bottom left corner of the **Formatter Window** allow you to specify the desired margins for your reports. Margins are specified in tenths of inches. For example, to specify a half-inch margin on the left side of the page, enter **5** in the **Left: field**.

Mastheads

The Masthead (or master header) is a standard Windows bitmap image file (.bmp) which can be created with most paint programs or Photoshop.

The instructions in this section are the same for **Mastheads**, **Watermarks** and **Footers**. They each have their own button in the **Formatter Window** but once you click on one of these items, they are exactly the same.

Click **Mastheads** on the **Formatter Window** to open the **Masthead List Window** (Figure 3).
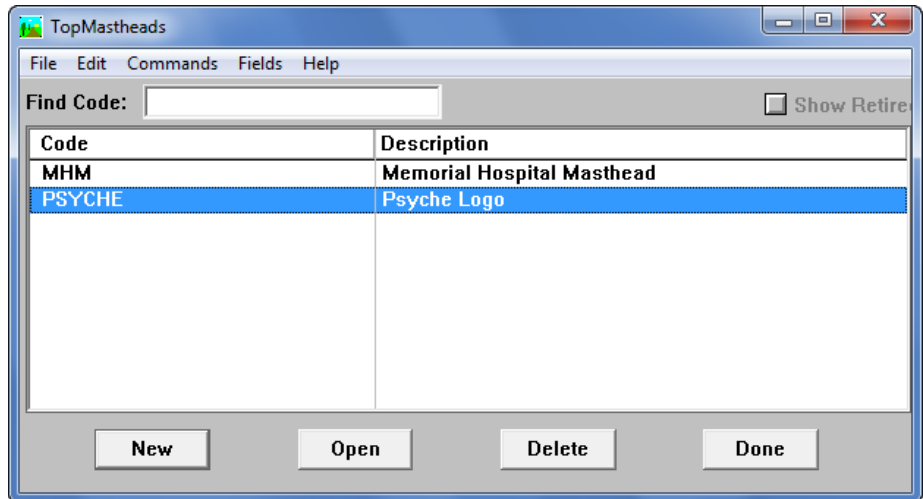
Figure 3 – **Masthead List Window**

Masthead List Window Columns

- **Code** – the User-defined code for the masthead file. This code must be unique.

- **Description** – the User-defined name for the masthead file.

Masthead List Window Action Buttons

- **New** – opens a blank **Masthead Window** (Figure 4).

- **Open** – opens the **Masthead Window** for the masthead highlighted in the list.

- **Delete** – deletes the masthead highlighted in the list.

- **Done** – closes the **Masthead List Window**.

Masthead Window

Click **New** or **Open** on the **Masthead List Window** to open the **Masthead Window** (Figure 4).

Masthead Window Fields

- **Code** – the User-defined code for the masthead file. This code must be unique.

- **Description** – the User-defined name for the masthead file.

Masthead Window Action Buttons

- **Previous** – opens the **Masthead Window** for the previous masthead in the **Masthead List Window**.

- **Next** – opens the **Masthead Window** for the next masthead in the **Masthead List Window**.

- **Cancel** – closes the **Masthead Window** without saving any changes.
- **Done** – closes the **Masthead Window** saving any changes.

Masthead Window Check Box

- **Print on One Page Only** – this was specifically designed for **Bottom Mastheads** or **Footers**. When this checkbox is checked for a Footer, it will only print at the bottom of the last page of the report.
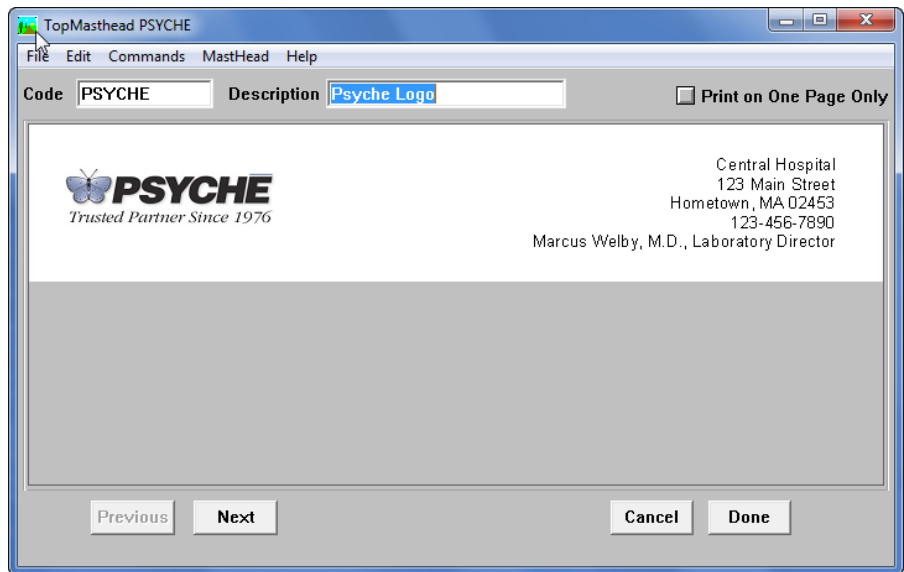
Figure 4 – **Masthead Window**

Masthead Window Menu

Masthead Menu

- *Load Masthead* – opens the standard file selection window. Navigate to the proper masthead file and click Open. The masthead will be displayed in the **Masthead Window**.
- *Edit Masthead* – not used. Function replaced by Load Masthead.
- *Reload Masthead* – not used. Function replaced by Load Masthead.
- *Show Report Templates* – opens the **Report Template List Window**, listing all report templates that use this masthead.

Report Fields

Click **Fields** on the **Formatter Window** to open the **Report Field Template List Window** (Figure 5).
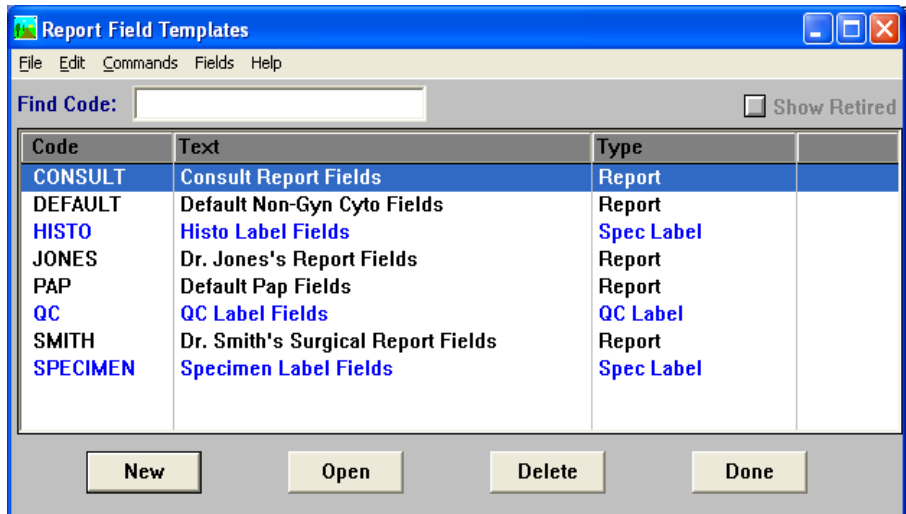
Figure 5 – **Report Field Template List Window**

Report Field Template List Window Columns

- **Code** – the User-defined code for the field template. This code must be unique.

- **Text** – the User-defined name for the field template.

- **Type** – indicates whether the template applies to reports or labels. Templates listed in black are report field templates; templates listed in blue are label field templates.

Report Field Template List Window Action Buttons

- **New** – opens a blank **Report Field Template Window** (Figure 6).

- **Open** – opens the **Report Field Template Window** for the field template highlighted in the list.

- **Delete** – deletes the field template highlighted in the list.

- **Done** – closes the **Report Field Template List Window**.

Report Field Template Window

Click **New** or **Open** on the **Report Field Template List Window** to open the **Report Field Template Window** (Figure 6).
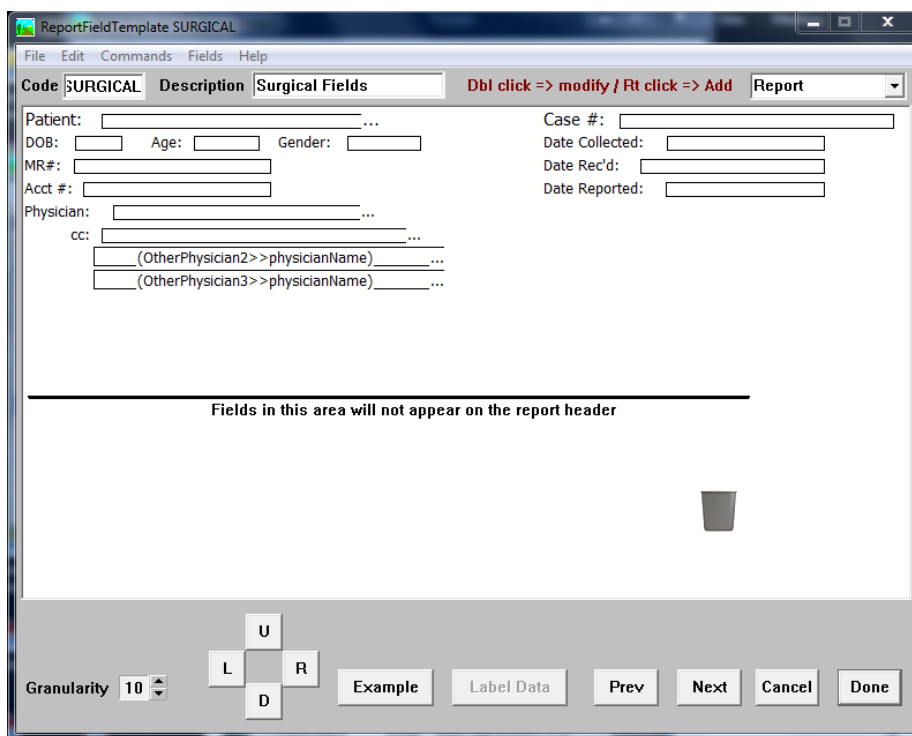
Figure 6 – **Report Field Template Window**

Report Field Template Window Fields

- **Code** – the User-defined code for the field template. This code must be unique.

- **Description** – the User-defined name for the field template.

- **Type** – drop-down menu of all available template types (Block Label, Order Label, Proc Label, QC Control Label, QC Label, Report and Spec Label).

- **Granularity** – functions much like the *Snap to Grid* feature in many drawing programs. Click the **arrow buttons** to increase or decrease the size of the grid. Imagine the white area above the black line as having an invisible grid. When you drag and drop a field, the field moves to the closest corner in the imaginary grid. The higher the granularity number, the larger the imaginary grid.

Report Field Template Window Action Buttons

- **Margin Toggle (L, U, R** and **D)** – shifts all of the Field Tags in the current Field Template **Left, Up, Right** or **Down.**

- **Example** – opens a Preview Window of current Field or Label Template.

- **Label Data** – opens the **Label Format Window**. Please refer to the section entitled **Label Formats** later in this chapter. This button is only available if the selected template type is a label format.

- **Prev** – opens the **Report Field Template Window** for the previous report field template in the **Report Field Template List Window**.

- **Next** – opens the **Report Field Template Window** for the next report field template in the **Report Field Template List Window**.

- **Cancel** – closes the **Report Field Template Window** without saving any changes.

- **Done** – closes the **Report Field Template Window** saving any changes.

Report Field Template Window Menu

Fields Menu

- *Show Masthead* – if the reserved preference (O204) to overlap masthead and demographics is set to **True**, WindoPath will display the masthead in a separate window to help in the placement of the report fields.

- *Show Report Templates* – opens the **Report Template List Window**, listing all Report Templates using this Report Field Template.

Report Field Selection Window

Click the right mouse button in the **Report Field Template Window** to open the **Report Field Selection Window** (Figure 7).

Selecting Fields

The **Report Field Selection Window** contains two scrolling list boxes of field names. The **Available Fields List Box** on the left displays the fields that are available to for use. The **Selected Fields List Box** on the right displays the fields that have already been selected to appear in the report field template.

Double click on a field in the **Available Fields List Box** to add it to the **Selected Fields List Box**. To remove a field from the **Selected Fields List Box**, double click on it.

Click **Done** to close the **Report Field Selection Window** and save any changes. Click **Cancel** to close the window without saving any changes.

Available Fields

The following fields are available for use on **WindoPath** reports:

Admitter

- After Hours Phone
- Assign To All Cases
- AutoPrint Only
- Case Type
- Case Type Object
- City
- City State ZIP
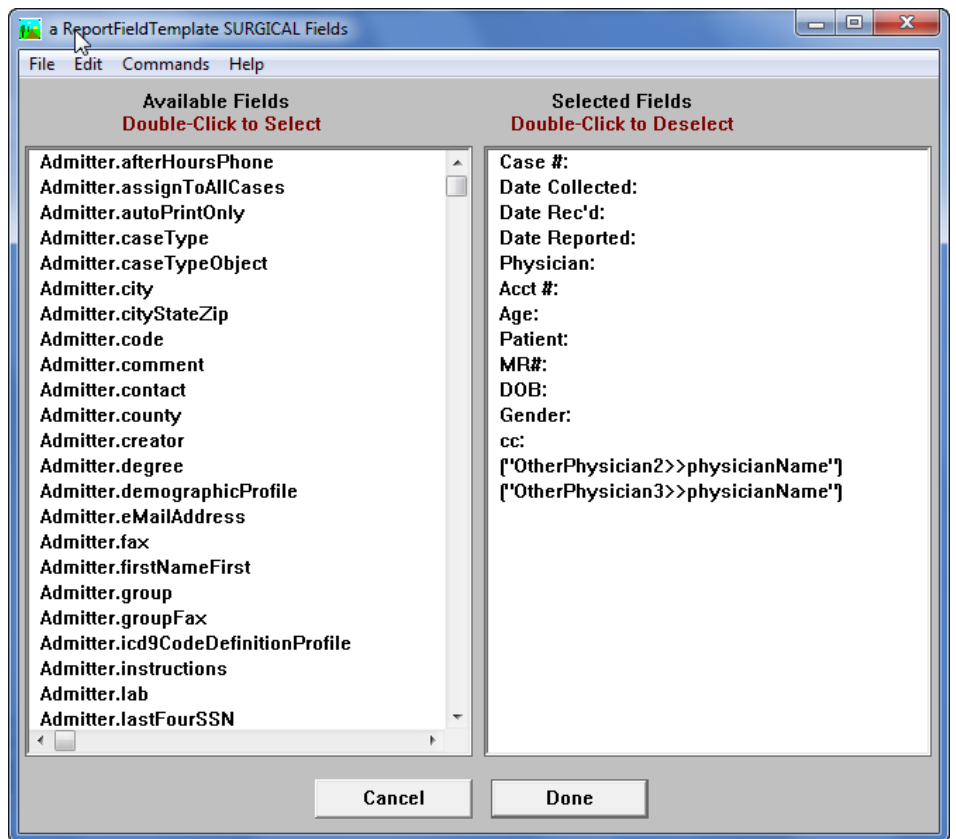
Figure 7 – **Report Field Selection Window**

- Code

- Comment

- Contact

- County

- Creator

- Degree

- Demographic Profile

- E-mail Address

- Fax

- First Name First

- Group

- Group Fax

- ICD Code Definition Profile

- Instructions

- Lab

- Last Four SSN

- Library

- Magic Printer Code

- Masthead

- Name

- Name or User1

- New Results Only

- No Print Charges

- NPI

- Phone

- Physician Panel

- Physician Profile

- PIN

- Print Charges Only

- Print Malignants First

- Privileged Text

- Prostate Sectors

- Reflex Always

- Reflex On Age

- Reflex On ASCUS

- Report Field Template

- Retired

- Schedule

- Send Partial Results

- Sex

- Soundex

- Specialty

- State

- Stop

- Street

- Street2

- Street3

- Street City

- Suppress Needs Clinical

- UPIN

- User 1-3

- Visit Location

- Web Password

- ZIP

Admitter Fax

- Batch Fax
- Before Time
- Code
- Creator
- Default Physician Fax
- eMail
- eMail2
- Fax
- Fax2
- Fax Cases
- Fax City
- Fax Days
- Fax Report Cases
- Fax State
- Fax Street
- Fax Street2
- Fax Street3
- Fax Times
- Fax Zip
- Group Physician
- Location
- Magic Printer
- Modem Number
- Order Block Procedure
- Order Block Type
- Phone
- Physician
- Physician Location
- Printer
- Retired
- User 1-3
- Withhold Group Results

Billing

- Creator
- Employer Address
- Employer City
- Employer Code
- Employer County
- Employer Emergency Phone
- Employer Name
- Employer Phone
- Employer State
- Employer ZIP
- Guarantor Address
- Guarantor City
- Guarantor County
- Guarantor First Name
- Guarantor Initial
- Guarantor Last Name
- Guarantor Phone
- Guarantor State
- Guarantor ZIP
- Marital Status
- Misc 1
- Misc 2
- Onset
- Status
- Visit

Case

- Abnormal Flag
- Abnormal Signed
- Accession Date
- Accession Time
- Admitter Fax
- Admitter Phone
- All Physician Names
- All Physicians

- Approved

- Autopsy Date

- Autopsy Time

- Calculated Age

- Canceled

- Case Number 2D Bar Code

- Case Status

- Case Type

- Case Type Object

- Charge Release Date

- Clinical Information

- Collection Date

- Collection Message

- Collection Time

- Comment

- Consultor Fax

- Consultor Phone

- Copies

- Creator

- Current Needs

- Current Report Physician Formatted Address

- Current Report Physician Name

- Death Date

- Death Time

- Diagnosis Interpretation

- Diagnosis Typist

- Diener

- Digital Review

- Distributed

- Drugs

- Extra 1-5

- Fasting Status

- Final Note

- Final Prostate Diagnosis

- Final Sign Out Date

- Final Sign Out Time

- Flags

- Formatted Group Physician Address

- Group Physician City

- Group Physician Code

- Group Physician Code Clipped

- Group Physician Name

- Group Physician Phone

- Group Physician State

- Group Physician Stop

- Group Physician Street

- Group Physician Street2

- Group Physician Street3

- Group Physician ZIP

- Histo Tech

- Label Note 1

- Label Note 2

- Last Pap Date

- Last Period

- Latest Case

- Locked for Unsign

- Manual Rescreen

- Miscellany

- Notes

- Number

- Number for Bar Code

- Number of Specimens

- On Hold Until

- OPF1 Fax

- OPF1 Phone

- Order Date

- Ordering Codes

- Order Number

- Order Status

- Order Time

- Original Report Pages

- Original Signer

- Original Sign Out Date

- Pathologist

- Pathologist Location

- Practice City

- Practice City State ZIP

- Practice Name

- Practice Name or Visit Location

- Practice State

- Practice Street

- Practice Street2

- Practice Street3

- Practice ZIP

- Pre Diagnosis

- Preliminary

- Previous Signer

- Previous Signer if Different

- Previous Sign Out Date

- Previous Sign Out Date if Different

- Reason

- Received Date

- Received Time

- Report Date

- Report Date Or Today

- Report Time

- Report Time or Now

- Report Title Modifier

- Rescreen Status

- Retain Blocks Until

- Review Date

- Reviewer

- Review Time

- Sequence Number

- Signer

- Sign Out Date

- Sign Out Hospital

- Sign Out Time

- Site and Procedure

- Status

- Submitter

- Submitter City State ZIP

- Submitter Fax

- Submitter Fax Number

- Submitter Name or User1

- Submitter Phone

- Supplemental Report

- Tech

- Transit Location

- User 1-3

- Visible to Patient

- Visit

- Visible to Patient

Consult

- Blocks Returned

- Blocks Sent

- Case

- Consultor

- Consult Type

- Correlation

- Creator

- Date Returned

- Date Sent

- Hospital

- Slides Returned

- Slides Sent

- Specimen

- Status

- Text Returned

- Text Sent

- User 1-3

Consultor

- After Hours Phone

- Assign To All Cases

- Case Type

- Case Type Object

- City

- City State ZIP

- Code

- Comment

- Contact

- County

- Creator

- Degree

- Demographic Profile

- E-mail Address

- Fax

- First Name First

- Group

- Group Fax

- ICD Code Definition Profile

- Lab

- Last Four SSN

- Library

- Magic Printer Code

- Masthead

- Name

- Name or User1

- New Results Only

- No Print Charges

- NPI

- Phone

- Physician Panel

- Physician Profile

- PIN

- Print Charges Only

- Print Malignants First

- Privileged Text

- Prostate Sectors

- Reflex Always

- Reflex on Age

- Reflex on ASCUS

- Report Field Template

- Retired

- Schedule

- Send Partial Results

- Sex

- Soundex

- Specialty

- State

- Stop

- Street

- Street2

- Street3

- Street City

- UPIN

- User 1-3

- Visit Location

- Web Password

- ZIP

Consultor Fax

- Batch Fax

- Before Time

- Code

- Creator

- Default Physician Fax

- eMail

- eMail2

- Fax

- Fax2

- Fax Cases

- Fax City

- Fax Days

- Fax Report Cases

- Fax State

- Fax Street

- Fax Street2

- Fax Street3

- Fax Times

- Fax Zip

- Group Physician

- Location

- Magic Printer

- Modem Number

- Order Block Procedure

- Order Block Type

- Phone

- Physician

- Physician Location

- Printer

- Retired

- User 1-3

- Withhold Group Results

Diagnosis

- Cancer Length

- Cancer Start

- Cancer Type

- Check Sum

- Coded

- Comment

- Creator

- Diagnosis Code

- Diagnosis Date

- Initials

- Length

- Malignant

- Note

- Number

- Original Diagnosis Code

- Original Diagnosis Date

- Original Initials

- Original Severity

- Original Text

- Rescreen Date (Pap Cases Only)

- Rescreen Diagnosis Code (Pap Cases Only)

- Rescreen Initials (Pap Cases Only)

- Rescreen Severity (Pap Cases Only)

- Rescreen Text (Pap Cases Only)

- Review Date

- Review Diagnosis Code

- Review Initials

- Review Severity

- Review Text

- Severity

- Source

- Specimen

- Status

- Synoptic Report

- Table

- Text

- User 1-3

- Validity

Insurance 1 – Insurance 3

- Balance Type

- Ben. Assign

- Billing

- Carrier

- Creator

- Deductible

- Eff. From Date

- Eff. To Date

- Employer Address

- Employer City

- Employer Name

- Employer Number

- Employer Phone

- Employer State

- Employer ZIP

- Group

- Policy

- Priority

- Status

- Subscriber Address

- Subscriber Birth Date

- Subscriber City

- Subscriber First Name

- Subscriber Initial

- Subscriber Last Name

- Subscriber Phone

- Subscriber Relation

- Subscriber Sex

- Subscriber SSN

- Subscriber State

- Subscriber ZIP

- User 1-3

Other Physician 1 – Other Physician 3

- Case

- Creator

- Physician Address 1-3

- Physician City 1-3

- Physician Code 1-3

- Physician Fax

- Physician Fax Number 1-3

- Physician Name 1-3

- Physician State 1-3

- Physician Street 1-3

- Physician Street2 1-3

- Physician Street3 1-3

- Physician Zip 1-3

- Status

Pathologist

- City

- City State ZIP

- Code

- County

- Creator

- E-mail Address

- Facsimile

- Fax

- First Name First

- Initials

- Lab

- Last Four SSN

- Name

- Name or User1

- Password Expiration Date

- Pathologist Type

- Phone

- Provider Number

- Rescreen Percentage

- Retired

- Review Percentage

- Sex

- Signature

- Soundex

- State

- Street

- Street2

- Street3

- Street City

- Title

- User 1-3

- ZIP

Patient

- City

- City State ZIP

- Code (*Medrec#)*

- Code Before Dot

- County

- Creator

- DOB

- DOD

- DOB on Reports

- E-mail Address

- Ethnicity

- Fax

- First Name First

- Insurance Carrier

- Insurance Number

- Lab

- Last Four SSN

- Last Name

- Medicare Number

- Name

- Name on Reports

- Name on Reports First Name First

- Name or User1

- Phone

- Physician

- Potential Match

- Preferred Language

- Preliminary Cause of Death

- Race

- Retired

- Security Code

- Sex

- Soundex

- Species

- SSN

- SSN Disguised

- SSN on Reports

- State

- Status

- Street

- Street2

- Street3

- Street City

- Street on Reports

- User 1-3

- Web Password

- ZIP

Specimen

- Adequacy (Pap Cases Only)

- Adequacy Reason (Pap Cases Only)

- Ad Hoc Reflex Tests

- Atypia

- Blocks

- Case

- Category

- Clinical Condition

- Clinical Information

- Collection Date

- Collection Message

- Collection Time

- Comment

- Creator

- Common Site Name

- Description

- DNA Report

- Extra Text

- Gleason 1

- Gleason 2

- Gleason Percent 1

- Gleason Percent 2

- Gross

- Gross Dictator

- Gross Typist

- Initials

- Instructions

- Microscopic

- Misc 1-3

- Nerve

- Normal

- Number

- Original Adequacy (Pap Cases Only)

- Original Category (Pap Cases Only)

- Original Description (*Adequacy* – Pap Cases Only – WindoPath v5.1 and lower)

- Original Microscopic (Pap Cases Only)

- Percent Cancer

- Pieces

- Preliminary Diagnosis

- Printed

- Procedure

- Prostate Diagnosis

- Rack Definition

- Received Date

- Received Time

- Report Index

- Rule Outs

- Site

- Slides

- Slot

- SNOMED Code

- Source

- Status

- Table

- User 1-3

Submitter

- After Hours Phone

- Assign To All Cases

- AutoPrint Only

- Case Type

- Case Type Object

- City

- City State ZIP

- Code

- Comment

- Contact

- County

- Creator

- Degree

- Demographic Profile

- E-mail Address

- Fax

- First Name First

- Group

- Group Fax

- ICD Code Definition Profile

- Instructions

- Lab

- Last Four SSN

- Library

- Magic Printer Code

- Masthead

- Name

- Name or User1

- New Results Only

- No Print Charges

- NPI

- Phone

- Physician Panel

- Physician Profile

- PIN

- Print Charges Only

- Print Malignants First

- Privileged Text

- Prostate Sectors

- Reflex Always

- Reflex On Age

- Reflex On ASCUS

- Report Field Template

- Retired

- Schedule

- Send Partial Results

- Sex

- Soundex

- Specialty

- State

- Stop

- Street

- Street2

- Street3

- Street City

- Suppress Needs Clinical

- UPIN

- User 1-3

- Visit Location

- Web Password

- ZIP

Submitter Fax

- Batch Fax

- Before Time

- Code

- Creator

- Default Physician Fax

- eMail

- eMail2

- Fax

- Fax2

- Fax Cases

- Fax City

- Fax Days

- Fax Report Cases

- Fax State

- Fax Street

- Fax Street2

- Fax Street3

- Fax Times

- Fax Zip

- Group Physician

- Location

- Magic Printer

- Modem Number

- Order Block Procedure

- Order Block Type

- Phone

- Physician

- Physician Location

- Printer

- Retired

- User 1-3

- Withhold Group Results

Visit

- Admitter Fax

- Age

- Also Known As

- City State ZIP

- Code (*Account#)*

- Comment

- Consultor Fax

- Creator

- Discharge Date

- Extra Field 1

- Extra Field 2

- First Name First

- Lab

- Last Four SSN

- Location

- Name or User1

- Patient

- Previous Patient

- Retired

- Status

- Street City

- Type

- User 1-3

- Visit Date (*Admit Date*)

Report Field Editor Window

Editing Field Labels

If you wish to change the label on a given field (for example, Case Number to Case#), double click on the field. The **Report Field Editor Window** opens (Figure 8). The first field at the top of this window is a read-only field. It shows you the name of the field. In the image below, we can see that this field's name is Case>>number.
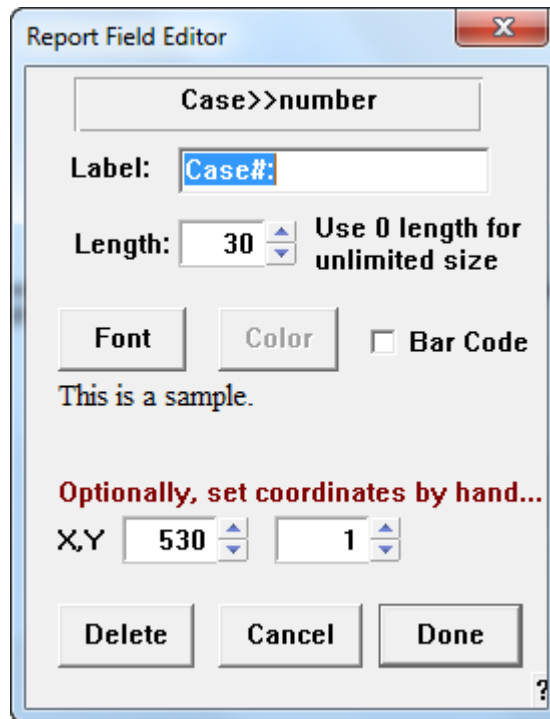
Figure 8 – **Report Field Editor Window**

Report Field Editor Window Fields

- **Label** – the User-defined name for the field as it will print on a report or label.

- **Length** – the maximum number of characters to print for this field. This includes the field label and all text to print in the field. The default is 0, which indicates unlimited length.

- **X** – the number of pixels from the left margin where the field will begin to print.

- **Y** – the number of pixels from the top margin where the field will begin to print.

Report Field Editor Window Action Buttons

- **Font** – opens the **Font Selection Window** (Figure 9), where the font, style and size for this field is selected.

- **Color** – opens the **Color Window** (Figure 10), where a color for this field can be selected.

- **Delete** – moves the current field below the line indicating that **fields in this area will not appear on the report header**.

- **Cancel** – closes the **Report Field Editor Window** without saving any changes.

- **Done** – closes the **Report Field Editor Window**, saving changes.

Report Field Editor Window Check Box

- **Bar Code** – check this box to indicate that the selected font for this report field is a bar code font.

Font Selection Window

The **Font List** in the upper left of the window displays a list of the fonts currently installed on your PC. Your list of fonts might differ from the list below depending upon the fonts that are installed on your PC.

Click on the name of the font to select it. To view the complete list, use the scroll bar. Select the desired font style and point size for the field and click **OK**.

It is recommended that you use **True Type** fonts. This renders a cleaner image when printed on reports.
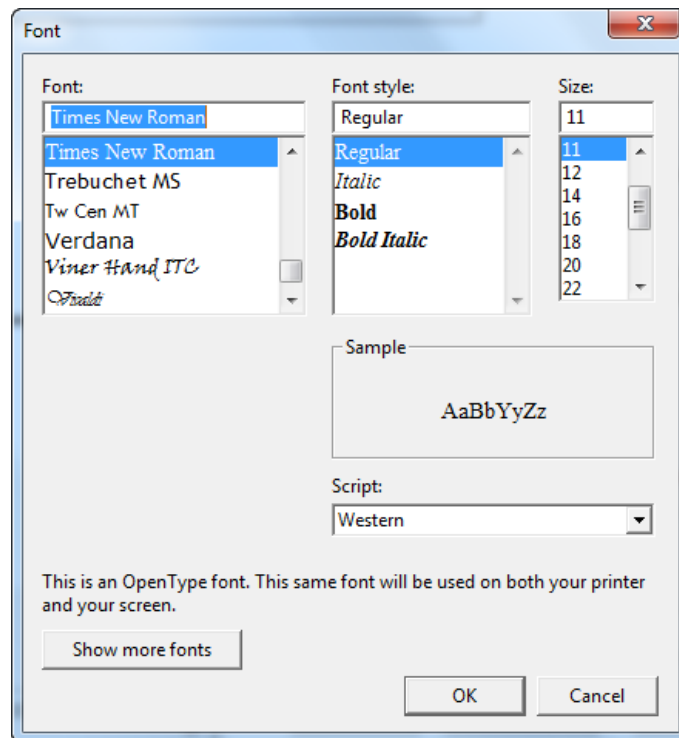
Figure 9 – **Font Selection Window**

Color Window

Select the desired color for the field and click **OK**.
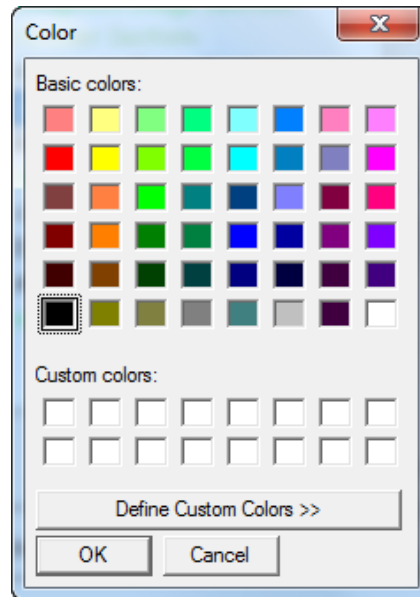
Figure 10 – **Color Window**

Report Sections

Click **Sections** on the **Formatter Window** to open the **Report Section Template List Window** (Figure 11).
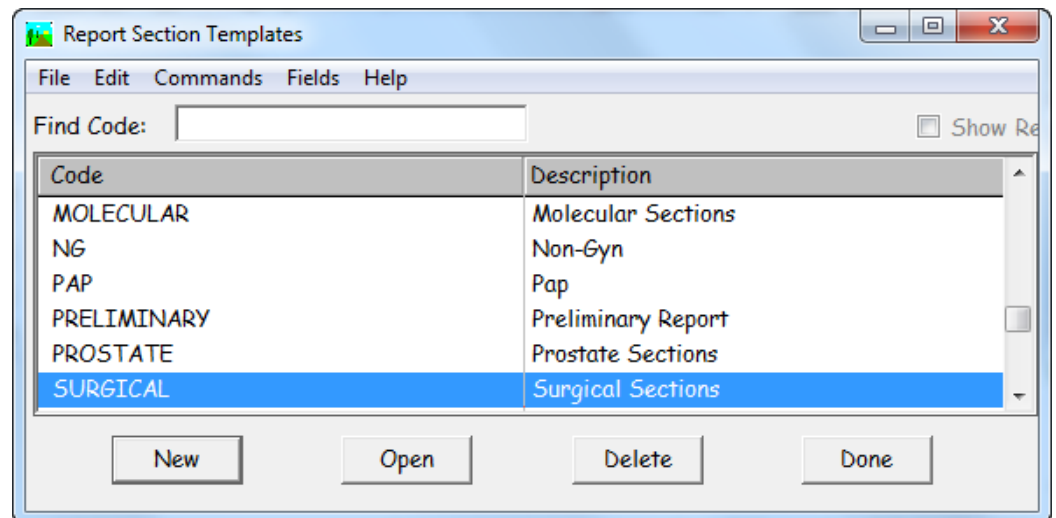
Figure 11 – **Report Section Template List Window**

Report Section Template List Window Columns

- **Code** – the User-defined code for the section template. This code must be unique.

- **Description** – the User-defined name for the section template.

Report Section Template List Window Action Buttons

- **New** – opens a blank **Report Section Template Window** (Figure 12).
- **Open** – opens the **Report Section Template Window** for the section template highlighted in the list.
- **Delete** – deletes the **Report Section Template** highlighted in the list.
- **Done** – closes the **Report Section Template List Window**.

Report Section Template Window

Click **New** or **Open** on the **Report Section Template List Window** to open the **Report Section Template Window** (Figure 12).

Selecting Sections

Enter a code for the section template in the **Code field** and a name for the template in the **Description field**.

The **Report Section Template Window** contains two scrolling list boxes of section names. The **Available Sections List Box** on the left displays the sections that are available to print on reports. The **Selected Sections List Box** on the right displays the sections that have already been selected to appear in the report section template.

Click on a section in the **Available Sections List Box** to add it to the **Selected Sections List Box**. To remove a section from the **Selected Sections List Box**, click on the section name and click the **Remove button**.

To arrange the selected sections in the order that you want them, highlight the section you want to move and click either **Move Up** or **Move Down**.

Click **Done** to save the section template.

Report Section Template Window Fields

- **Code** – the User-defined code for the section template. This code must be unique.
- **Description** – the User-defined name for the section template.

Report Section Template Window Action Buttons

- **Move Up** – moves the highlighted section up in the **Selected Sections List Box**.
- **Move Down** – moves the highlighted section down in the **Selected Sections List Box**.
- **Remove** – removes the highlighted section from the **Selected Sections List Box**.
- **Previous** – opens the **Report Section Template Window** for the previous report section template in the **Report Section Template List Window**.
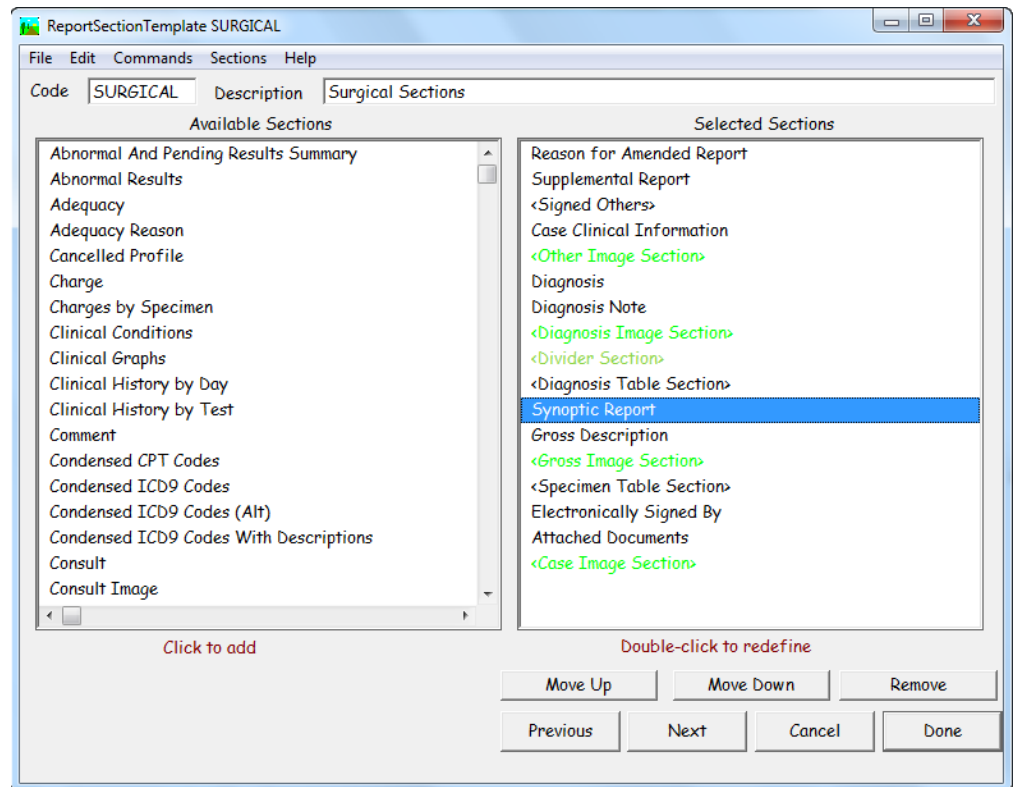
Figure 12 – **Report Section Template Window**

- **Next** – opens the **Report Section Template Window** for the next report section template in the **Report Section Template List Window**.

- **Cancel** – closes the **Report Section Template Window** without saving any changes.

- **Done** – closes the **Report Section Template Window**, saving any changes.

Report Section Template Window Menu

Sections Menu

- *Show Report Templates* – opens the **Report Template List Window** (Figure 13) listing all Report Templates using this Report Section Template.

Available Sections

The following sections are available to be printed on **WindoPath** reports:

- Abnormal and Pending Results Summary

- Abnormal Results

- Adequacy (Pap Cases Only)

- Adequacy Reason (Pap Cases Only)

- Attached Documents

- Cancelled Profile

- Case Clinical Information

- Case Image

- Charge

- Charges by Specimen

- Clinical Graphs

- Clinical History by Day

- Clinical History by Test

- Comment

- Condensed CPT Codes

- Condensed ICD Codes

- Condensed ICD Codes (Alt)

- Condensed ICD Codes with Descriptions

- Consult

- Consult Image

- Corrected Results

- Deleted Procedures

- Diagnosis

- Diagnosis Image

- Diagnosis Note

- Diagnosis Table

- Divider (*inserts a divider line on report)*

- DNA (DNA Cases Only)

- Drug Testing

- Drug Testing with Notes

- External Clinical Results

- External Clinical Results by Group

- External Clinical Results Table

- Extra 1

- Extra 2

- Extra 3

- Extra 4

- Extra 5

- Final Note

- Gross

- Gross Image

- ICD Code

- ICD Codes by Specimen

- Instrument

- Internal Clinical Results by Group

- Internal Clinical Results Grid Format

- Internal Clinical Results Table

- Internal Clinical Results Table Format Ignoring Profiles Starting With **DRUG**

- Internal Clinical Results Text Format

- Internal Historical Clinical Results By Group By Date

- Internal Historical Clinical Results By Group By Procedure

- Material Submitted (*Procedures*)

- Microscopic

- Microscopic Image

- Miscellaneous

- Miscellany

- Molecular Comments

- Molecular Profile Comments

- Molecular Results

- Non-Pap Message (*disclaimer*)

- Non-Pap Message 2 (*disclaimer*)

- Other Image

- Page Break (*inserts a page break on report*)

- Pap Category

- Pap Message (*disclaimer*)

- Pap Message 2 (*disclaimer*)

- Physicians

- Pre diagnosis

- Preliminary Diagnosis

- Procedure

- Procedure Report Information

- Prostate

- Prostate Diagram

- Prostate Summary

- Reason (Corrected Cases Only)

- Related Cases (Preliminary Reports Only)

- Signature

- Signed Others

- Signed Supplemental

- SNOMED Code

- SNOMED Codes by Specimen

- Source

- Specimen Clinical Information

- Specimen Comment

- Specimen Table

- Supplemental Report

- Synoptic Report

- User Location

- User Practice

- Visit Comment

- Warning Message

Editing Section Labels

If you wish to change the label for a given section (for example, Gross to Gross Description), double click the section. The **Report Section Editor Window** opens (Figure 13). The WindoPath Section Name displays the name of the section. This is a read-only field and cannot be changed.

Figure 13 – **Report Section Editor Window**

Report Section Editor Window Fields

- **User-defined Section Name** – the name of the section heading as it will print on reports. If you do not wish the section heading to print on reports, delete all text from the field.

- **Max. Image Height/Width** – for sections that pertain to images, this defines the maximum height and width for all of the images of this type in this section.

Report Section Editor Window Action Buttons

- **Text Font** – opens the **Font Selection Window** (Figure 9), where the font, style and size for the text of this section is selected.

- **Heading Font** – opens the **Font Selection Window** (Figure 9), where the font, style and size for this section heading is selected.

- **Section Color** – opens the **Color Window** (Figure 10), where a color for this text of this section can be selected.

- **Heading Color** – opens the **Color Window** (Figure 10), where a color for this section heading can be selected.

- **Cancel** – closes the **Report Section Editor Window** without saving any changes.

- **Done** – closes the **Report Section Editor Window**, saving any changes.

Report Section Editor Window Checkboxes

- **Underline** – underlines the section heading of the current section if checked.

Watermarks

Watermarks print centered on each report page with the report text printing over them.

Refer to the section entitled **Mastheads** for instructions on loading Watermarks into the **Masthead Window**.

Footers

Report footers print at the bottom of each report page.

Refer to the section entitled **Mastheads** for instructions on loading Footers into the **Masthead Window**.

Report Templates

Click **Report Templates** on the **Formatter Window** to open the **Report Template List Window**, shown in Figure 14.
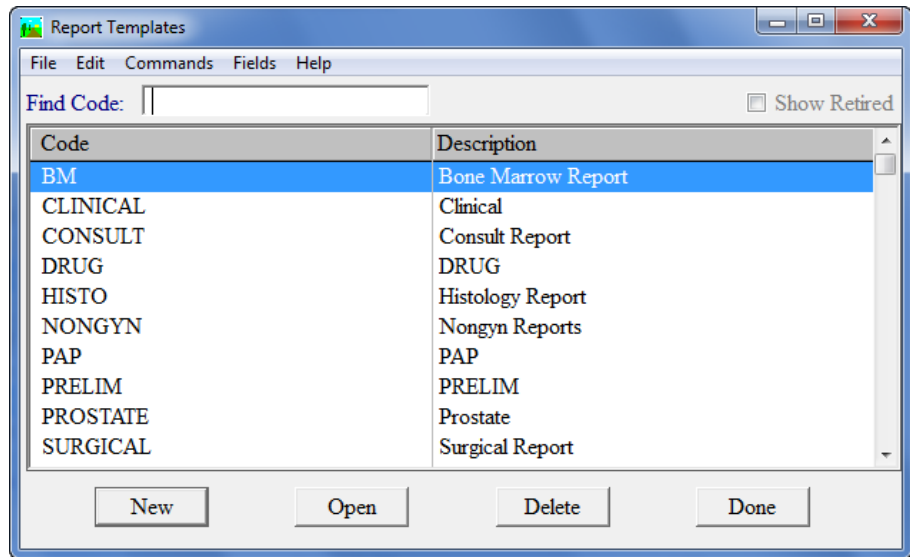
*Figure 14 – **Report Template List Window***

Report Template List Window Columns

- **Code** – the User-defined code for the **Report Template**. This code must be unique.

- **Description** – the User-defined name for the **Report Template**.

Report Template List Window Action Buttons

- **New** – opens a blank **Report Template Window**.

- **Open** – opens the **Report Template Window** for the report template highlighted in the list (Figure 15).

- **Delete** – deletes the **Report Template** highlighted in the list.

- **Done** – closes the **Report Template List Window**.

Report Template Window

Click **New** or **Open** on the **Report Template List Window** to open the **Report Template Window** (Figure 15).

Creating a Report Template

Enter a code for the report template in the **Code field** and a name for the template in the **Description field**.

The **Report Template Window** contains three required list boxes: Masthead Templates, Field Templates and Section Templates. It also contains two optional list boxes: Footer Templates and Watermark Templates.

Select one template in each list by clicking on it. The selected templates will make up this **Report Template**. Click **Done** to save the report template.
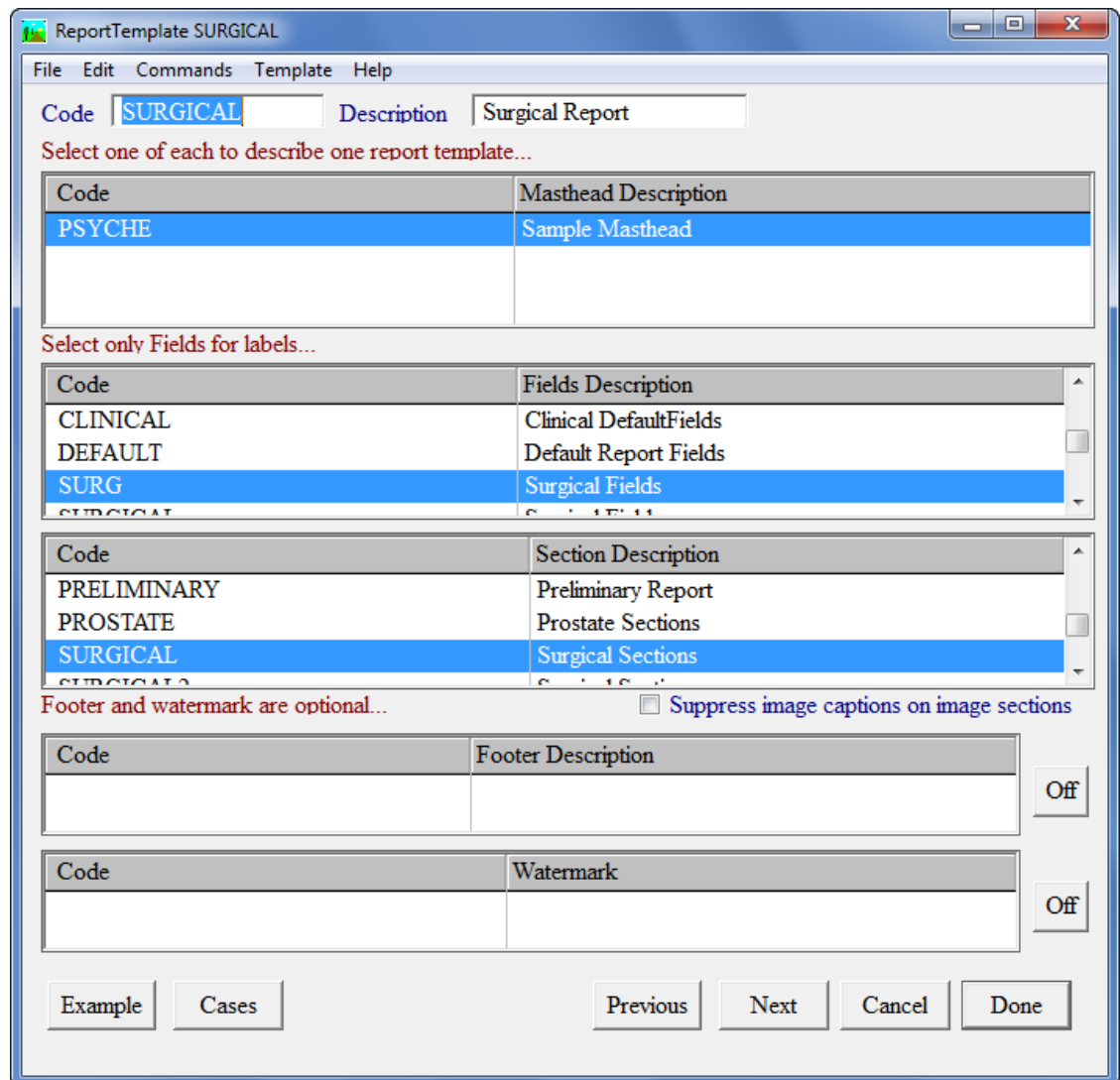
Figure 15 – **Report Template Window**

Report Template Window Fields

- **Code** – the User-defined code for the report template. This code must be unique.

- **Description** – the User-defined name for the report template.

Report Template Window Action Buttons

- **Previous** – opens the **Report Template Window** for the previous report template in the **Report Template List Window**.

- **Next** – opens the **Report Template Window** for the next report template listed in the **Report Template List Window.**

- **Cancel –** closes the **Report Template Window** without saving any changes.

- **Done** – closes the Report Template Window, saving any changes.

- **Example** – opens a Print Preview of the current report template. The Case selected for the print preview is the first case in the **Case List Window** that has a specimen and is assigned to a report definition that uses this template.

- **Cases** – opens the **Case List Window**, displaying all Cases that use the current report template.

Report Template Window Checkboxes

- **Suppress Image Captions on Image Sections** – suppresses image captions on this report template only.

Report Template Window Menu

Template Menu

- *Show Reports* – opens the **Report Definition List Window** (Figure 16) listing all report definitions using this report template.

Report Definitions

Click **Assign Reports** on the **Formatter Window** to open the **Report Definition List Window** (Figure 16). You will create report definitions to instruct WindoPath which templates to use for each case.
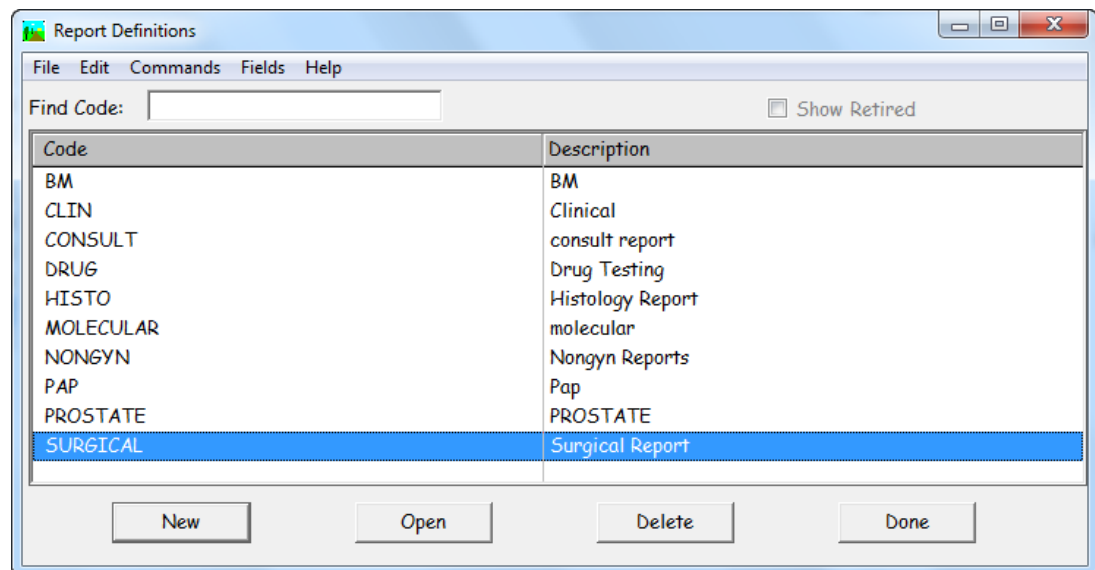
Figure 16 – **Report Definition List Window**

Report Definition List Window Columns

- **Code** – the User-defined code for the **Report Definition**. This code must be unique.

- **Description** – the User-defined name for the **Report Definition**.

Report Definition List Window Action Buttons

- **New** – opens a blank **Report Definition Window**.

- **Open** – opens the **Report Definition Window** for the report definition highlighted in the list (Figure 17).

- **Delete** – deletes the **Report Definition** highlighted in the list.

- **Done** – closes the **Report Definition List Window**.

Report Definition Window

Click **New** or **Open** on the **Report Definition List Window** to open the **Report Definition Window** (Figure 17).

Figure 17 – **Report Definition Window**

Report Definition Window Fields

- **Code** – the User-defined code for the report definition. This code must be unique.

- **Description** – the User-defined name for the report definition.

- **Report Title** – the User-defined title for the report definition. This is the title that prints as the Runner down the right margin of reports and in the header at the top of the reports.

- **Location** – limits this report definition to print reports for Cases with a specific Visit location. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Location box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Pathologist>** – limits this report definition to print reports for Cases assigned to a specific Pathologist. Press **CTRL+L** to display entries from the **Pathologist Library**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Patient Type** – limits this report definition to print reports for Cases with a specific Visit type. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Patient type box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Physician** – limits this report definition to print reports for Cases assigned to a specific Physician. Press **CTRL+L** to display entries from the **Physicians Library**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Physician Loc>** – limits this report definition to print reports for Cases assigned to a specific Physician Location. Press **CTRL+L** to display entries from the **Physician Faxes Dialog**. To select a dialog entry, highlight it and click **Select** or press **ENTER**. The dialog allows you to make a selection based on the Physician Name or the Physician Location.

- **Grp. Phys>** – limits this report definition to print reports for Cases assigned to a specific Group Physician. Press **CTRL+L** to display entries from the **Physicians Dialog**. To select a dialog entry, highlight it and click **Select** or press **ENTER**.

- **Sign Out Loc** – limits this report definition to print reports for Cases with a specific Sign Out Location. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Sign Out Location box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Case Type** – limits this report definition to print reports for Cases with a specific Case type. Click the drop-down menu to display the list of available Case types. Click on the desired Case type to select it.

- **Needs** – limits this report definition to print reports for Cases with a specific Case Needs. Click the drop-down menu to display the list of available Case Needs. Click on the desired Case Need to select it.

- **Source** – limits the report definition to print reports for Cases assigned to a specific Source Definition. Press **CTRL+L** to display entries from the **Source Library**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Earliest/Latest Sign Out Date** – limits this report definition to print reports for Cases with a specific sign out date range. Enter the appropriate dates in the fields.

- **Lab** – not used.

- **Also print to physician location>** – when a case prints using this report definition, a will be printed for the physician in this field. This will only happen when batch printing. Press **CTRL+L** to display entries from the **Physician Library**. To select a library entry, highlight it and click **Select** or press **ENTER**.

Report Definition Window List Box

- **Report Templates** – the **Report Template** (Masthead, Fields and Sections) that will be used when printing reports for Cases that match the criteria for this **Report Definition**. Click on the desired **Report Template** to select it.

Report Definition Window Action Buttons

- **Previous** – opens the **Report Definition Window** for the previous report definition in the **Report Definition List Window**.

- **Next** – opens the **Report Definition Window** for the next report definition in the **Report Definition List Window**.

- **Cases** – opens the **Case List Window**, displaying all Cases that use the current report definition.

- **Cancel** – closes the **Report Definition Window** without saving any changes.

- **Done** – closes the **Report Definition Window** saving any changes.

Report Definition Window Checkboxes

- **Provisional Reports Only** – limits this report definition to print reports for Cases that have not been signed out.

- **Prostate Case** – limits this report definition to print reports for cases that have specimen sources beginning with the code **PROS.** Used for labs that process Prostate Cases using the Surgical Case Type rather than the Prostate Case Type.

Creating a Report Definition

Click on a template in the **Report Templates List** to highlight it.

If desired, enter data in one or more of the criteria selection fields.

Enter a code for the report definition in the **Code field** and a name for the report definition in the **Description field**. Enter the report title (it will print in the title line of each report and in the page runner in the right margin of report) in the **Report Title field**. Click **Done** to save the report definition.

Label Formats

The format for each label type (Block, Order, Procedure, QC Control, QC or Specimen) is specified in the **Formatter**. Each label type has a separate set of fields that can be selected and arranged on the label. These fields consist mainly of demographic information. For example: Patient name, Case number, Medical Record Number, etc.

Click the **Formatter**, then click **Fields** to open the **Report Field Template List Window**. Click **New** to open the **Report Field Template Window** (Figure 18).
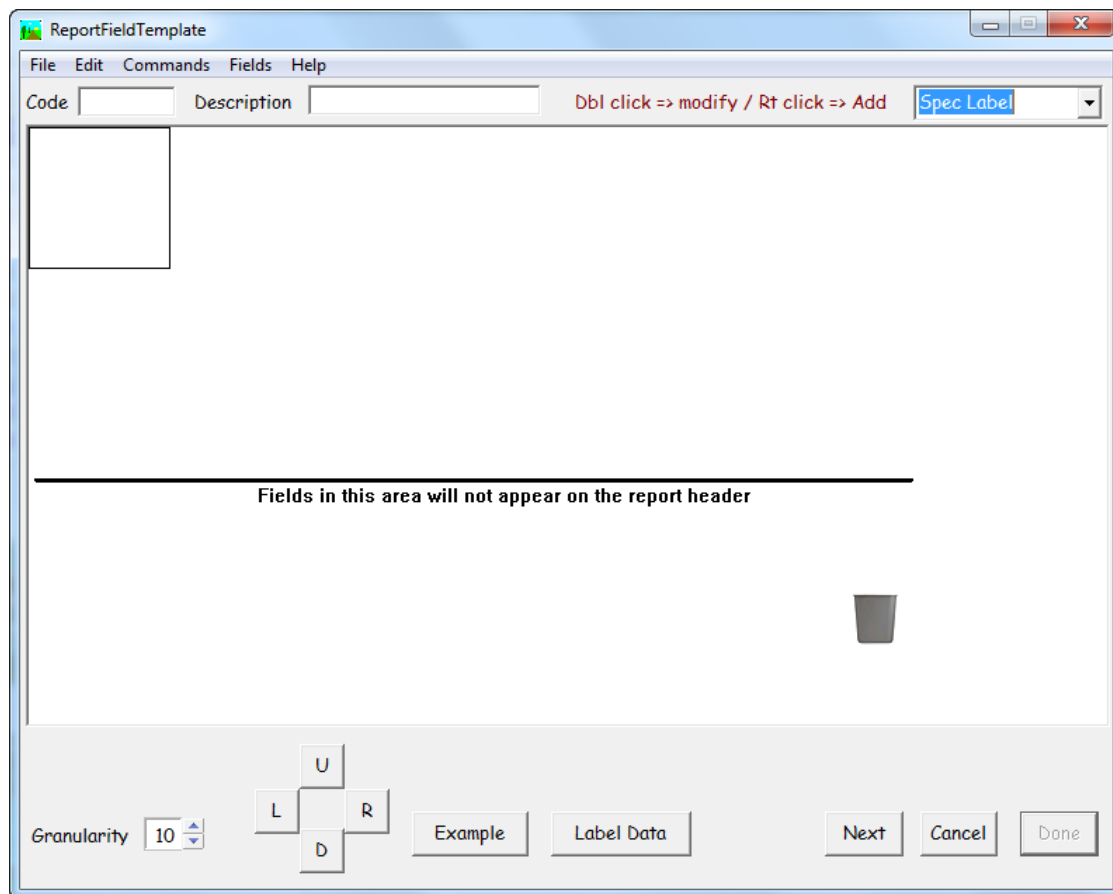
Figure 18 – **Report Field Template Window – Label Report Format**

Click the drop down menu in the top right hand corner of the **Report Field Template Window** to select which type of label you are formatting.

Label Data Format Window

The **Label Data button** on the **Report Field Template Window** allows you to set the dimensions of the label type you are formatting.

Click **Label Data** to open the **Label Data Window** (Figure 19).
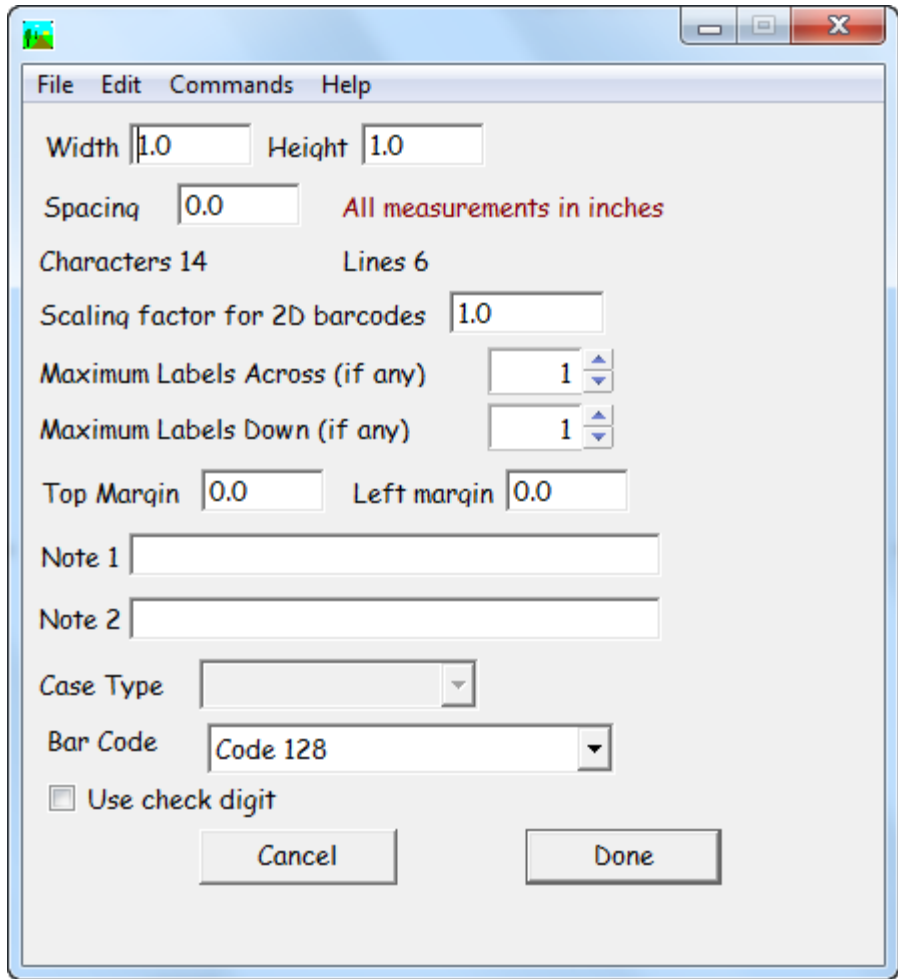
Figure 19 – **Label Data Window**

Label Format Window Fields

- **Width** – the exact width of your labels in inches.

- **Height –** the exact height of your labels in inches.

- **Spacing –** a right margin for each label, inserting a small amount of space before the next label prints.

- **Scaling factor for 2D bar codes –** allows you to scale the bar code.

- **Maximum Labels Across (if any) –** the number of columns across your sheet of labels.

- **Maximum Labels Down (if any) –** the number of rows down your sheet of labels.

- **Margins top/left** – the amount of margin on the label stock before the actual label begins. These values should be calculated from the printer's actual printable area not the edge of the page.

- **Note 1/Note 2** – a User-defined line of text to print on the labels. They correspond with label tags Note 1 and Note 2 in the fields.

- **Case Type** – a drop-down menu of all available Case types. Select the desired Case type from this list if you wish to associate the current label format with a particular Case type.

- **Bar Code** – a drop-down menu of all available bar code types. Select if a bar code will be used on the current label format.

Label Format Window Checkboxes

- **Use Check Digit** – a check digit is a computer calculated number added to the end of a bar code that will ensure the integrity of the bar code number. This is an industry standard. Use this checkbox to set the **Check Digit** to **True** or **False**. Commonly, when using bar code font 39, the **Use Check Digit** checkbox is left checked. When using bar code font 128, the **Use Check Digit** checkbox is left unchecked.

Report Field Template Window

Based on the dimensions specified for the label type in **Label Data**, a box approximating the label dimensions will appear in the upper half of the window (Figure 18). The fields to appear on the label will be dragged and dropped into this box.

Click the right mouse button in the **Report Field Template Window** to open the **Report Field Selection Window** (Figure 20).
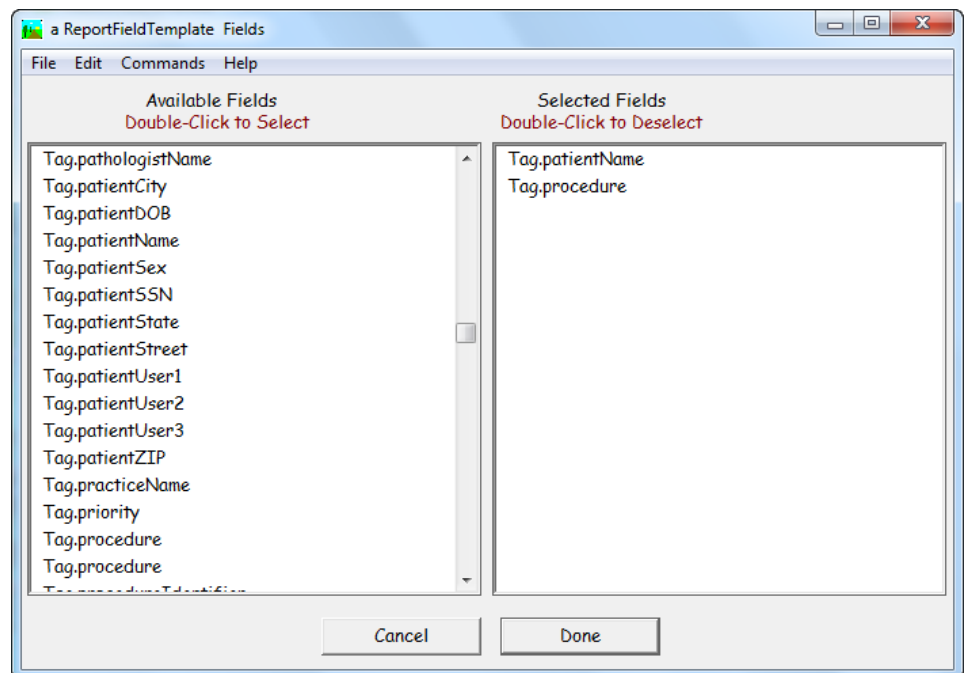
Figure 20 – **Report Field Selection Window – Label Report Fields**

The **Report Field Selection Window** contains two scrolling list boxes of field names. The **Available Fields List Box** on the left displays the fields that are available to be printed. The **Selected Fields List Box** on the right displays the fields that have already been selected to appear on the label template.

Double click on a field in the **Available Fields List Box** to add it to the **Selected Fields List Box**. To remove a field from the **Selected Fields List Box**, double click on it.

Click **Done** to close the **Report Field Selection Window**, saving any changes. Click **Cancel** to close the window without saving any changes.

Selecting Fields

Click the right mouse button in the **Report Field Template Window** to open the **Report Field Selection Window**, shown in Figure 20.

Double click on a field in the **Available Fields List Box** to add it to the **Selected Fields List Box**. To remove a field from the **Selected Fields List Box**, double click on it.

Click **Done** to close the **Report Field Selection Window** and return to the **Report Field Template Window**. Selected fields will appear below the black line. Drag each field into the box in the upper half of the window and drop it in the desired position.

To remove a field from the template, drag the field back beneath the black line into the **trash can** or double click to open it and hit **Delete.**

Enter a code for the field template in the **Code field** and a name for the template in the **Description field**. Click **Done** to save the field template.

Editing Field Labels

Due to the limited space available on labels, it is recommended that you remove the field name from each field selected to print on labels. Double click on any field. The **Report Field Editor Window** opens.

Delete the field name from the **Label field**. You can also set the maximum number of characters per field by entering the desired number in the **Length field**. It is recommended that you set a maximum character length for each field to avoid potentially lengthy text from overlapping onto the next label.

A separate font may be specified for each report field. Click **Font** to open the **Font Selection Window**. It is recommended that a small font size be selected.

Click **Color** to specify a color for this report field. The site wide preference for Color must be turned on for this button to be available.

Click the **Bar Code check box** to indicate that the selected font for this report field is a bar code font.

Click **Done** to close the **Report Field Editor Window** saving any changes. Click **Cancel** to close the window without saving any changes.

Available Fields

The following fields are available to be printed on labels:

Block Label - Field Tag Specifications

Field Name	Contents	Example
Tag.accessionDate	Case accession date	01/01/2015
Tag.accessionTime	Case accession time	14:05
Tag.case	Case Number, Patient Name, Needs	S2015-000001: SMITH, JOHN (Needs Gross)
Tag.caseCollectionMessage	Collection message entered on the case level of a clinical case.	
Tag.caseCollectionTime	Collection time entered on the case level.	
Tag.caseNumber	Case Number	S2015-000001
Tag.caseNumber2DBarCode	Case Number as a 2D barcode	
Tag.caseUser1	User1 field (Accession Window – Case tab)	User may specify field name
Tag.caseUser2	User2 field (Accession Window – Case tab)	User may specify field name
Tag.caseUser3	User1 field (Accession Window – Case tab)	User may specify field name
Tag.clinicalProcedureCodes	Prints the clinical procedure codes on specimen labels for clinical cases	
Tag.collectionDate	Case Collection Date	01/01/2015
Tag.collectionMessage	Collection message entered on the specimen level of a clinical case	
Tag.condensedCaseNumber	Case Number with century removed from year and leading zeroes removed from accession number	S15-1
Tag.cytycLabel	Formats case number bar code in accordance with the Cytyc Imager requirements (Case Number minus Case Type prefix and Creation Date minus the last digit)	
Tag.evShowRescreenPercent	Case Number	S2015-000001
Tag.groupPhysicianName	Name of the Physician Group to which the Submitter belongs	
Tag.idString	Case Number	S2015-000001
Tag.labCode	Lab Code for Site Security	
Tag.labelNote1	Note 1 field from Label Format Window	*Free text field*
Tag.labelNote2	Note 2 field from Label Format Window	*Free text field*
Tag.labelNumber	Label number	1
Tag.labelPrinter	NOT USED	

Tag.labName	Lab name	
Tag.level	Prints level for multiple slides on a single procedure	LV1, LV2, LV3
Tag.levelOrSlide	NOT USED	
Tag.line1	Line 1 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line2	Line 2 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line3	Line 3 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line4	Line 4 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line5	Line 5 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line6	Line 6 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.location	Visit Location	
Tag.medicalRecordNumber	Patient Medical Record Number	
Tag.numberofSpecimens	Number of Specimens	3
Tag.objectidentifier	Specimen ObjectID	309634
Tag.objectidentifier2DBarCode	Specimen ObjectID as a 2D barcode	
Tag.pathologistInitials	Initials of Pathologist assigned to Case	JJ
Tag.pathologistName	Name of Pathologist assigned to Case	JONES M.D., JANE
Tag.patientCity	Patient City	MILFORD
Tag.patientDOB	Patient Date of Birth	01/01/1950
Tag.patientName	Patient Name	SMITH, JOHN
Tag.patientSex	Patient Sex	M
Tag.patientSSN	Patient Social Security Number	123-45-6789
Tag.patientState	Patient State	MA
Tag.patientStreet	Patient Street Address	1 Main St.
Tag.patientUser1	User1 field (Accession Window – Patient tab)	User may specify field name

Tag.patientUser2	User2 field (Accession Window – Patient tab)	User may specify field name
Tag.patientUser3	User3 field (Accession Window – Patient tab)	User may specify field name
Tag.patientZIP	Patient ZIP Code	01757
Tag.practiceName	Yellow pages field from the Physician Fax Location	
Tag.Priority	Profile priority as set by Profiles, Set Priority in the Histology window	STAT
Tag.procedure	Procedure Code (Procedure List Window - Procedure column)	H&E
Tag.procedureIdentifier	Specimen Block Procedure ObjectID	309634
Tag.profileCode	Specimen Block Code	Routine
Tag.receivedDate	Case Received Date	01/01/2015
Tag.reportFieldString	Case Number	S2015-000001
Tag.shortCaseID	Case Number	S2015-000001
Tag.ShortID	Case Number	S2015-000001
Tag.site	Specimen Site	LUNG
Tag.slide	Slide Number preceded by 'SL'	SL1
Tag.slideLabel	Specimen Procedure Name	H&E
Tag.slideNumber	Slide Number	1
Tag.slideNumberButFirst	Slide Number unless there is only 1 slide	
Tag.sourceModifier	Specimen Extra Text	Right
Tag.specimenBlockBillType	Bill Type – Profiles menu, Set Bill Type in the Histology window (Procedure List Window – Bill column)	Medicare
Tag.specimenBlockCode	Profile code	ROUTINE
Tag.specimenBlockComment	Internal Comment field from Profile Window and Procedure Window – same field (Procedure List Window - Profiles - Edit Profile or Procedures - Edit Procedure)	*Free text field*
Tag.specimenBlockDescription	Profile Description (Librarian - Profile Window - Description field)	Liver Panel
Tag.specimenBlockDesignation	Profile Designation Code	BLK
Tag.specimenBlockIDString	Profile Designation and Number (Procedure List Window - Profile column)	BLK.A
Tag.specimenBlockInstructions	Instructions field from Profile Window and Procedure Window – same field	*Free text field*

	(Procedure List Window - Profiles - Edit Profile or Procedures - Edit Procedure)	
Tag.specimenBlockLevels	NOT USED	
Tag.specimenBlockNumber	Profile Number	A or 1
Tag.specimenBlockNumberButFirst	Profile Number unless there is only 1 Profile	
Tag.specimenBlockObjectID	Specimen Block Object ID	309705
Tag.specimenBlockObjectIdentifier2DBarCode	Specimen Block Object ID as a 2D barcode	
Tag.specimenBlockPerformingLocation	Performing Location – Profiles menu, Performing Location in the Histology window (Procedure List Window – Pref. Loc. column)	
Tag.specimenBlockPieces	Number of Pieces (Procedure List Window - Pcs column)	1
Tag.SpecimenBlockPriority	Priority – Profiles menu, Set Priority in the Histology window (Procedure List Window – Priority column)	STAT
Tag.specimenBlockProcedureBillType	Bill Type – Profiles menu, Set Bill Type in the Histology window (Procedure List Window – Bill column)	Medicare
Tag.specimenBlockProcedureCode	Procedure Code (Procedure List Window - Procedure column)	H&E
Tag.specimenBlockProcedureComment	Comment field from Procedure Window (Procedure List Window – Procedures – Edit Procedure)	*Free text field*
Tag.specimenBlockProcedureInstructions	NOT USED	
Tag.specimenBlockProcedureObjectID	Specimen Block Procedure ObjectID	309634
Tag.specimenBlockProcedureObjectID2DBarCode	Specimen Block Procedure ObjectID as a 2D barcode	
Tag.specimenBlockProcedurePerformingLocation	NOT USED	
Tag.SpecimenBlockProcedurePriority	NOT USED	
Tag.specimenBlockType	Profile Type (Procedure List Window - Type column)	H&E
Tag.specimenNumber	Specimen Number (Procedure List Window - S column)	A or 1
Tag.specimenNumberButFirst	Specimen Number unless only 1 specimen	
Tag.specimenUser1	User1 field (Accession Window – Specimen tab)	User may specify field name
Tag.specimenUser2	User2 field (Accession Window – Specimen tab)	User may specify field name
Tag.specimenUser3	User3 field (Accession Window – Specimen tab)	User may specify field name
Tag.submitterLocationPhoneNumber	Submitter Phone Number (Physician Fax Location – Phone Field)	508-473-1500

Tag.submitterName	Case Submitting Physician Name	GREEN M.D., GRETA
Tag.time	Current time	02:05:00 PM
Tag.today	Current date	01/01/15
Tag.type	Label Type (Block, Procedure, QC or Specimen)	Specimen
Tag.user	Name of User who ordered the label	SMITH, MARY
Tag.userCode	Code of User who ordered the label	MS
Tag.vialtype	Prints the vial type on specimen labels for clinical cases	Lavender
Tag.visitDate	Visit Admit Date	01/01/2015
Tag.visitExtraField1	Visit Extra Field 1	*Free text field*
Tag.visitExtraField2	Visit Extra Field 2	*Free text field*
Tag.visitNumber	Visit Account Number	38490843
Tag.visitType	Visit Type	Out Patient
Tag.visitUser1	User1 field (Accession Window – Visit tab)	User may specify field name
Tag.visitUser2	User2 field (Accession Window – Visit tab)	User may specify field name
Tag.visitUser3	User3 field (Accession Window – Visit tab)	User may specify field name

Procedure Label - Field Tag Specifications

Field Name	Contents	Example
Tag.accessionDate	Case accession date	01/01/2015
Tag.accessionTime	Case accession time	14:05
Tag.case	Case Number, Patient Name, Needs	S2015-000001: SMITH, JOHN (Needs Gross)
Tag.caseCollectionMessage	Collection message entered on the case level of a clinical case.	
Tag.caseCollectiontime	Collection time entered on the case level.	14:05
Tag.caseNumber	Case Number	S2015-000001
Tag.caseNumber2DBarCode	Case Number as a 2D barcode	
Tag.caseUser1	User1 field (Accession Window – Case tab)	User may specify field name
Tag.caseUser2	User2 field (Accession Window – Case tab)	User may specify field name
Tag.caseUser3	User1 field (Accession Window – Case tab)	User may specify field name

Tag.clinicalProcedureCodes	Prints the clinical procedure codes on specimen labels for clinical cases	
Tag.collectionDate	Case Collection Date	01/01/2015
Tag.collectionMessage	Collection message entered on the specimen level of a clinical case	
Tag.condensedCaseNumber	Case Number with century removed from year and leading zeroes removed from accession number	S15-1
Tag.cytycLabel	Formats case number barcode in accordance with the Cytyc Imager requirements (Case Number minus Case Type prefix and Creation Date minus the last digit)	
Tag.evShowRescreenPercent	Displays Case Number on the label; receive pop up window with rescreen percentage prior to displaying or printing label	S2015-000001
Tag.groupPhysicianName	Name of the Physician Group to which the Submitter belongs	
Tag.idString	Case Number	S2015-000001
Tag.labCode	Lab Code for Site Security	
Tag.labelNote1	Note 1 field from Label Format Window	*Free text field*
Tag.labelNote2	Note 2 field from Label Format Window	*Free text field*
Tag.labelNumber	Label number	1
Tag.labelPrinter	NOT USED	
Tag.labName	Lab name for Site Security	
Tag.level	Prints level for multiple slides on a single procedure	LV1, LV2, LV3
Tag.levelOrSlide	NOT USED	
Tag.line1	Line 1 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line2	Line 2 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line3	Line 3 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line4	Line 4 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line5	Line 5 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*

Tag.line6	Line 6 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.location	Visit Location	SOUTH
Tag.medicalRecordNumber	Patient Medical Record Number	12345
Tag.numberofSpecimens	Number of Specimens	3
Tag.objectidentifier	Specimen ObjectID	309634
Tag.objectIdentifier2DBarCode	Specimen ObjectID as a 2D barcode	
Tag.pathologistInitials	Initials of Pathologist assigned to Case	JJ
Tag.pathologistName	Name of Pathologist assigned to Case	JONES M.D., JANE
Tag.patientCity	Patient City	MILFORD
Tag.patientDOB	Patient Date of Birth	01/01/1950
Tag.patientName	Patient Name	SMITH, JOHN
Tag.patientSex	Patient Sex	M
Tag.patientSSN	Patient Social Security Number	123-45-6789
Tag.patientState	Patient State	MA
Tag.patientStreet	Patient Street Address	1 Main Street
Tag.patientUser1	User1 field (Accession Window – Patient tab)	User may specify field name
Tag.patientUser2	User2 field (Accession Window – Patient tab)	User may specify field name
Tag.patientUser3	User3 field (Accession Window – Patient tab)	User may specify field name
Tag.patientZIP	Patient ZIP Code	01757
Tag.practiceName	Yellow pages field from the Physician Fax Location	
Tag.priority	Profile priority as set by Profiles, Set Priority in the Histology window.	STAT
Tag.procedure	Procedure Code (Procedure List Window - Procedure column)	H&E
Tag.procedureIdentifier	Specimen Block Procedure ObjectID	309634
Tag.profileCode	Specimen Block Code	
Tag.receivedDate	Case Received Date	01/01/2015
Tag.reportFieldString	Case Number	S2015-000001
Tag.shortCaseID	Case Number	S2015-000001
Tag.shortID	Case Number	

Tag.site	Specimen Site	LUNG
Tag.slide	Slide Number preceded by 'SL'	SL1
Tag.slideLabel	Specimen Procedure Name	
Tag.slideNumber	Slide Number	1
Tag/slideNumberButFirst	Slide Number unless there is only 1 slide	
Tag.sourceModifier	Specimen Extra Text	Right
Tag.specimenBlockBillType	Bill Type – Profiles menu, Set Bill Type in the Histology window (Procedure List Window – Bill column)	Medicare
Tag.specimenBlockCode	Profile code	LVR
Tag.specimenBlockComment	Internal Comment field from Profile Window and Procedure Window – same field (Procedure List Window - Profiles - Edit Profile or Procedures - Edit Procedure)	*Free text field*
Tag.specimenBlockDescription	Profile Description (Librarian - Profile Window - Description field)	Liver Panel
Tag.specimenBlockDesignation	Profile Designation Code	BLK
Tag.specimenBlockIDString	Profile Designation and Number (Procedure List Window - Profile column)	BLK.A
Tag.specimenBlockInstructions	Instructions field from Profile Window and Procedure Window – same field (Procedure List Window - Profiles - Edit Profile or Procedures - Edit Procedure)	*Free text field*
Tag.specimenBlockLevels	NOT USED	
Tag.specimenBlockNumber	Profile Number	A or 1
Tag.specimenBlockNumberButFirst	Profile Number unless there is only 1 profile	
Tag.specimenBlockObjectID	Specimen Block Object ID	309705
Tag.specimenBlockObjectIdentifier2DBarCode	Specimen Block Object ID as a 2D barcode	
Tag.specimenBlockPerformingLocation	Performing Location – Profiles menu, Performing Location in the Histology window (Procedure List Window – Pref. Loc. column)	
Tag.specimenBlockPieces	Number of Pieces (Procedure List Window - Pcs column)	1
Tag.specimenBlockPriority	Priority – Profiles menu, Set Priority in the Histology window (Procedure List Window – Priority column)	STAT
Tag.specimenBlockProcedureBillType	Bill Type – Profiles menu, Set Bill Type in the Histology window (Procedure List Window – Bill column)	Medicare
Tag.specimenBlockProcedureCode	Procedure Code (Procedure List Window - Procedure column)	H&E

Tag.specimenBlockProcedureComment	Comment field from Procedure Window (Procedure List Window – Procedures – Edit Procedure)	*Free text field*
Tag.specimenBlockProcedureInstructions	NOT USED	
Tag.specimenBlockProcedureObjectID	Specimen Block Procedure ObjectID	309634
Tag.specimenBlockProcedureObjectIdentifier2DBarCode	Specimen Block Procedure ObjectID as a 2D barcode	
Tag.specimenBlockProcedurPriority	NOT USED	
Tag.specimenBlockType	Profile Type (Procedure List Window - Type column)	
Tag.specimenNumber	Specimen Number (Procedure List Window - S column)	A or 1
Tag.specimenNumberButFirst	Specimen Number unless only 1 specimen	
Tag.specimenUser1	User1 field (Accession Window – Specimen tab)	User may specify field name
Tag.specimenUser2	User2 field (Accession Window – Specimen tab)	User may specify field name
Tag.specimenUser3	User3 field (Accession Window – Specimen tab)	User may specify field name
Tag.submitterLocationPhoneNumber	Submitter Phone Number (Physician Fax Location – Phone Field)	508-473-1500
Tag.submitterName	Case Submitting Physician Name	GREEN M.D., GRETA
Tag.time	Current time	02:05:00 PM
Tag.today	Current date	01/01/15
Tag.type	Label Type (Block, Procedure, QC or Specimen)	Specimen
Tag.user	Name of User who ordered the label	SMITH, MARY
Tag.userCode	Code of User who ordered the label	MS
Tag.vialType	Prints the vial type on specimen labels for clinical cases	Lavender
Tag.visitDate	Visit Admit Date	01/01/2015
Tag.visitExtraField1	Visit Extra Field 1	*Free text field*
Tag.visitExtraField2	Visit Extra Field 2	*Free text field*
Tag.visitNumber	Visit Account Number	38490843
Tag.visitType	Visit Type	Out Patient
Tag.visitUser1	User1 field (Accession Window – Visit tab)	User may specify field name
Tag.visitUser2	User2 field (Accession Window – Visit tab)	User may specify field name
Tag.visitUser3	User3 field (Accession Window – Visit tab)	User may specify field name

QC Label - Field Tag Specifications

Field Name	Contents	Example
Tag.clinicalProcedureCodes	Prints the clinical procedure codes on specimen labels for clinical cases	
Tag.cytycLabel	Formats case number barcode in accordance with the Cytyc Imager requirements (Case Number minus Case Type prefix and Creation Date minus the last digit)	
Tag.idString	Case Number	S2015-000001
Tag.labelNote1	Note 1 field from Label Format Window	*Free text field*
Tag.labelNote2	Note 2 field from Label Format Window	*Free text field*
Tag.labelNumber	Label number	1
Tag.labelPrinter	NOT USED	
Tag.level	Prints level for multiple slides on a single procedure	LV1, LV2, LV3
Tag.levelorSlide	NOT USED	
Tag.line1	Line 1 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line2	Line 2 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line3	Line 3 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line4	Line 4 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line5	Line 5 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line6	Line 6 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.numberOfSpecimens	Number of Specimens	3
Tag.objectIdentifier	Specimen ObjectID	309634
Tag.practiceName	Yellow pages field from the Physician Fax Location	
Tag.reportFieldString	Case Number	S2015-000001
Tag.slideNumber	Slide Number	1
Tag.slideNumberButFirst	Slide Number unless there is only 1 slide	

Tag.time	Current time	02:05:00 PM
Tag.today	Current date	01/01/15
Tag.type	Label Type (Block, Procedure, QC or Specimen)	Specimen
Tag.user	Name of User who ordered the label	SMITH, MARY
Tag.userCode	Code of User who ordered the label	MS
Tag.vialType	Prints the vial type on specimen labels for clinical cases	Lavender

Specimen Label - Field Tag Specifications

Field Name	Contents	Example
Tag.accessionDate	Case accession date	01/01/2015
Tag.accessionTime	Case accession time	14:05
Tag.case	Case Number, Patient Name, Needs	S2015-000001: SMITH, JOHN (Needs Gross)
Tag.caseCollectionMessage	Collection message entered on the case level of a clinical case.	
Tag.caseCollectionTime	Collection time entered on the case level.	14:05
Tag.caseNumber	Case Number	S2015-000001
Tag.caseNumber2DBarCode	Case Number as a 2D bar code	
Tag.caseUser1	User1 field (Accession Window – Case tab)	User may specify field name
Tag.caseUser2	User2 field (Accession Window – Case tab)	User may specify field name
Tag.caseUser3	User3 field (Accession Window – Case tab)	User may specify field name
Tag.clinicalProcedureCodes	Prints the clinical procedure codes on specimen labels for clinical cases	
Tag.collectionDate	Case Collection Date	01/01/2015
Tag.collectionMessage	Collection message entered on the specimen level of a clinical case	
Tag.condensedCaseNumber	Case Number with century removed from year and leading zeroes removed from accession number	S15-1
Tag.cytycLabel	Formats case number barcode in accordance with the Cytyc Imager requirements (Case Number minus Case Type prefix and Creation Date minus the last digit)	
Tag.evShowRescreenPercent	Displays Case Number on the label; receive pop up window with rescreen percentage prior to displaying or printing label	S2015-000001

Tag.firstSpecimenBlockObjectID	Objectid ID of the first Specimen Block (Clinical cases only)	
Tag.firstSpecimenBlockObjectIdentidier 2DBarCode	Objectid ID of the first Specimen Block as a 2D barcode (Clinical cases only)	
Tag.groupPhysicianName	Name of the Physician Group to which the Submitter belongs	
Tag.idString	Case Number	S2015-000001
Tag.labCode	Lab Code for Site Security	
Tag.labelNote1	Note 1 field from Label Format Window	*Free text field*
Tag.labelNote2	Note 2 field from Label Format Window	*Free text field*
Tag.labelNumber	Label number	1
Tag.labelPrinter	NOT USED	
Tag.labName	Lab Name for Site Security	
Tag.level	Prints level for multiple slides on a single procedure	LV1, LV2, LV3
Tag.levelOrSlide	NOT USED	
Tag.line1	Line 1 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line2	Line 2 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line3	Line 3 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line4	Line 4 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line5	Line 5 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.line6	Line 6 from QC Label Window (Procedure List Window - Labels Menu - Print/Generate QC Labels)	*Free text field*
Tag.location	Visit Location	
Tag.medicalRecordNumber	Patient Medical Record Number	12345
Tag.numberOfSpecimens	Number of Specimens	3
Tag.objectIdentifier	Specimen ObjectID	316799
Tag.objectIdentifier2DBarCode	Specimen ObjectID as a 2D barcode	
Tag.pathologistInitials	Initials of Pathologist assigned to the Case	JJ
Tag.pathologistName	Name of Pathologist assigned to the Case	JONES M.D., JANE

Tag.patientCity	Patient City	MILFORD
Tag.patientDOB	Patient Date of Birth	01/01/1950
Tag.patientName	Patient Name	SMITH, JOHN
Tag.patientSex	Patient Sex	M
Tag.patientSSN	Patient Social Security Number	123-45-6789
Tag.patientState	Patient State	MA
Tag.patientStreet	Patient Street Address	1 Main Street.
Tag.patientUser1	User1 field (Accession Window – Patient tab)	User may specify field name
Tag.patientUser2	User2 field (Accession Window – Patient tab)	User may specify field name
Tag.patientUser3	User3 field (Accession Window – Patient tab)	User may specify field name
Tag.patientZIP	Patient ZIP Code	01757
Tag.practiceName	Yellow pages field from the Physician Fax Location	
Tag.procedure	Procedure Code (Procedure List Window - Procedure column)	
Tag.profileCodes	Specimen Block Code	
Tag.profileDescriptions	Specimen Block Description	
Tag.receivedDate	Case Received Date	01/01/2015
Tag.reportFieldString	Case Number	S2015-000001
Tag.shortCaseID	Case Number	S2015-000001
Tag.shortID	Case Number	S2015-000001
Tag.site	Specimen Site	LUNG
Tag.slideNumber	Slide Number	1
Tag.slideNumberButFirst	Slide Number unless there is only 1 slide	
Tag.sourceModifier	Specimen Extra Text	Right
Tag.specimen	Specimen Number, Site, Procedure, Number of Diagnoses	A:LUNG-Biopsy(1)
Tag.specimenCollectionDate	Specimen Collection Date	
Tag.specimenCollectionMessage	Specimen Collection Message	
Tag.specimenCollectionTime	Specimen Collection Time	
Tag.specimenNumber	Specimen Number (Procedure List Window – S column)	A or 1

Tag.specimenNumberButFirst	Specimen Number unless there is only 1 specimen	
Tag.specimenObjectID	Specimen ObjectID	345708
Tag.specimenObjectIdentifier2DBarCode	Specimen ObjectID as a 2D barcode	
Tag.specimenReceivedDate	Specimen Received Date	
Tag.specimenReceivedTime	Specimen Received Time	
Tag.specimenUser1	User1 field (Accession Window – Specimen tab)	User may specify field name
Tag.specimenUser2	User2 field (Accession Window – Specimen tab)	User may specify field name
Tag.specimenUser3	User3 field (Accession Window – Specimen tab)	User may specify field name
Tag.submitterLocationPhoneNumber	Submitter Phone Number (Physician Fax Location – Phone Field)	508-473-1500
Tag.submitterName	Case Submitting Physician Name	GREEN M.D., GRETA
Tag.time	Current time	02:05:00 PM
Tag.today	Current date	01/01/15
Tag.type	Label Type (Block, Procedure, QC or Specimen)	Specimen
Tag.user	Name of User who ordered the label	SMITH, MARY
Tag.userCode	Code of the User who ordered the label	MS
Tag.vialType	Prints the vial type on specimen labels for clinical cases	Lavender
Tag.visitDate	Visit Admit Date	01/01/2015
Tag.visitExtraField1	Visit Extra Field 1	*Free text field*
Tag.visitExtraField2	Visit Extra Field 2	*Free text field*
Tag.visitNumber	Visit Account Number	38490843
Tag.visitType	Visit Type	Out Patient
Tag.visitUser1	User1 field (Accession Window – Visit tab)	User may specify field name
Tag.visitUser2	User2 field (Accession Window – Visit tab)	User may specify field name
Tag.visitUser3	User3 field (Accession Window – Visit tab)	User may specify field name

Chapter 14 – Manager's Guide

This chapter describes the manager functions available to Laboratory Managers and System Managers.

Dispatcher Menu Manager Functions

The **Dispatcher Menu** in the **Dispatcher Window** contains a list of menu item commands for the **Dispatcher Window** including keyboard shortcuts, system information and audit logs.

This section defines each of the items in the **Dispatcher Menu** and important **Manager Functions** that are accessed by selecting certain items in the **Dispatcher Menu.**

Dispatcher Menu

- *Close Windows* – closes all open **WindoPath** windows.

- *Enable Windows* – not used.

- *Show Updater* – opens the **Updater Window**.

- *Show Memory* – displays the **PC's available *memory reso*urces.

- *Show number of Users* – displays a prompt **number of users logged in: x out of y**.

- *Show Preferences* – opens a view window for the current user session that lists every WindoPath Preference with the **True** or **False** Preference Setting for Local, Site Wide, Reserved and User.

- *Show Version* – displays the version number of your copy of **WindoPath**.

- *Show New Features* – displays the New Features window. This is the same window that displays when **WindoPath** is loading.

- *Audit Errors* – displays OutReach errors up to x number of days ago for a selected User.

- *Log to Audit* – displays the **Log Audit Window**.

- *Advance Procedures* – opens th**e Advance Procedures Window.** For more information, please see the section titled **Specimen and Procedure Tracking** in *Chapter 5 – Case Procedures and Profiles.*

- *Print Procedure Labels* – opens the **Print Procedure Labels Window**. For more information, please see the section titled **Specimen and Procedure Tracking** in *Chapter 5 – Case Procedures and Profiles.*

- *Rack Loading* – opens the **Rack Loading Window.** For more information, please see the section titled **Specimen and Procedure Tracking** in *Chapter 5 – Case Procedures and Profiles.*

- *View Gross* – allows the User to scan the cassette label (Specimen Block Object ID bar code) to view the Gross.

- *Accession (ALT+A)* – opens the **Accession Window**.

- *Archives (ALT+R)* – opens the **Archive Window**.

- *Current Cases (ALT+C)* – opens the **Case List Window**.

- *Finished (ALT+E)* – quits WindoPath.

- *Formatter (ALT+F)* – opens the **Formatter Window**.

- *Labels (ALT+B)* – opens the **Labels Window**.

- *Librarian (ALT+L)* – opens the **Librarian Window**.

- *Human Resources (ALT+H)* – opens the **Human Resources Window**.

- *Review Clinical Results (ALT+I)* – opens the **Clinical Results Review Window**.

- *Launch MicroPath* – if the lab has **MicroPath**, this feature allows the User to open **MicroPath** from **WindoPath**.

- *Test Printers* – this is a utility that tests the printer definitions in physician faxes. This opens a window and then lists the different printer names set in physician faxes and whether it was able to successfully create a printer object for that name. Clicking on any printer name will list each physician which has a physician fax for that printer. This is useful for finding bad printers in the WindoPath setup.

The Updater Window

Select *Show Updater* from the **Dispatcher Window** – *Dispatcher Menu* to open the **Updater Window** (Figure 1).

The Updater is a program that runs between each client PC and the database that resides on the server. It is responsible for the sharing of data between the PCs and the **WindoPath** database. The Updater runs every 30 seconds.

During the majority of the time, you will not need to be concerned with what the Updater is doing. However, it is important that you familiarize yourself with what the various elements of this window mean.
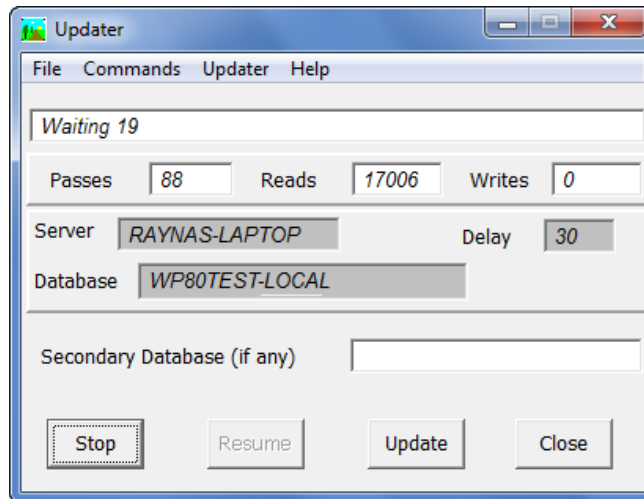
Figure 1 – **Updater Window**

Updater Window Fields

- **Status** – the status of the Updater. It usually indicates *Waiting* when it is waiting for the next update to run. When initially loading, it flashes various messages, such as *Loading Case Table* or other table names. Background processes are also displayed, such as *Printing* or *Sending Results*. Users may not log out while background processes are running.

- **Passes** – the number of passes that have been made to the database.

- **Reads** – the number of reads that have been performed on the database.

- **Writes** – the number of writes that have been performed on the database.

- **Server** – the name of the server to which your PC is connected.

- **Delay** – the amount of time between reads and writes in seconds (updates). It is usually 30.

- **Database** – the name of the database as it is defined on your server.

- **Secondary Database (if any)** – the name of the secondary database as it is defined on your server. This is for Psyche use.

Updater Window Action Buttons

- **Stop** – stops the Updater. You should not press this button unless directed to by Psyche Systems technical personnel.

- **Resume** – restarts the Updater if it has stopped. You should not press this button unless directed to by Psyche Systems technical personnel.

- **Update** – retrieves updates from the server without waiting until the next time the Updater runs. This button should not be pressed during the initial loading as it will not decrease loading time.

- **Close** – closes the **Updater Window**.

Show Memory

Select *Show Memory* from the **Dispatcher Window** – *Dispatcher Menu* to open the **Show Memory Window** (Figure 2).

This window displays the available memory resources of your PC. Click **OK** to close the window.
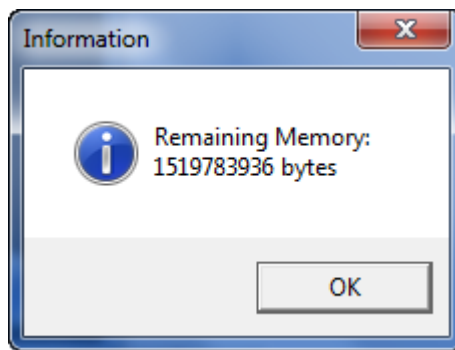
Figure 2 – **Show Memory Window**

Show Version

Select *Show Version* from the **Dispatcher Window** – *Dispatcher Menu* to open the **Show Version Window** (Figure 3).

This window displays the version of the current WindoPath session, the version revision date and Psyche Systems' address and contact information. Click **OK** to close the window.
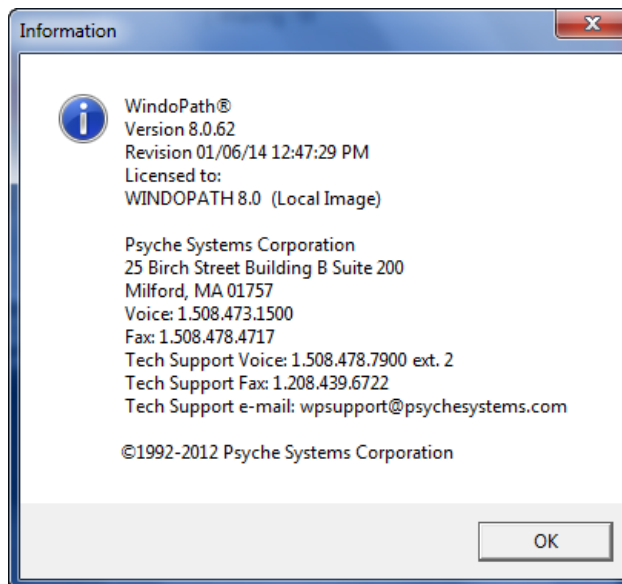
Figure 3 – **Show Version Window**

Log to Audit Window

Select *Log to Audit* from the **Dispatcher Window** – *Dispatcher Menu* to open the **Log Audit Window** (Figure 4).

The Log to Audit function is used to calculate the time Cytotechnologists spend screening gynecological slides for quality assurance purposes as well as to log other statistical information for later query data retrieval.
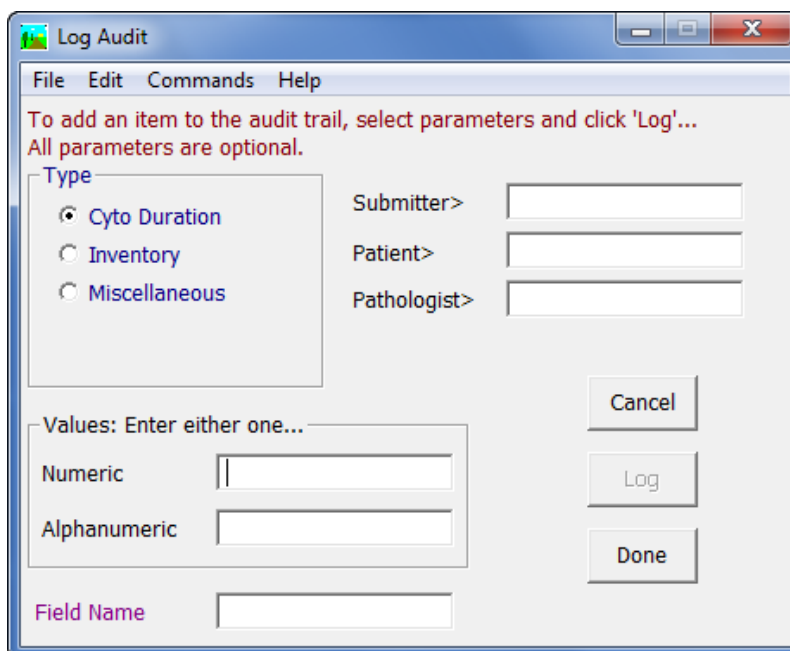
Figure 4 – **Log Audit Window**

Log Audit Window Fields

- **Submitter>** – to log data for a specific submitting Physician, press **CTRL+L** to display entries from the **Physicians Library** and select the desired Physician.

- **Patient>** – to log data for a specific Patient, press **CTRL+L** to display entries from the **Patient Library** and select the desired Patient.

- **Pathologist>** – to log data for a specific Pathologist, press **CTRL+L** to display entries from the **Pathologist Library** and select the desired Pathologist or Cytotechnologist.

- **Numeric** – the numeric value for the data being logged (Example: 100).

- **Alphanumeric** – the alphanumeric value for the data being logged (Example: Mary Jones).

- **Field Name** – the categorization of the data being logged (Example: Slides Screened). You may type free text in this field or press **CTRL+L** to display entries from the **Phrases Library, Audit Field Name box**.

Log Audit Window Action Buttons

- **Cancel** – closes the **Log Audit Window** without saving any changes.

- **Log** – logs the entered data to the Audit Table.

- **Done** – closes the **Log Audit Window**.

Log Audit Window Check Boxes

- **Cyto Duration** – flags the entered data to be logged to the Audit Table as Cytology-specific data. (Example: number of hours a specific Cytotechnologist screened today.)

- **Inventory** – flags the entered data to be logged to the Audit Table as Inventory data. (Example: number of slides used today.)

- **Miscellaneous** – flags the entered data to be logged to the Audit Table as miscellaneous.

Manage Menu

- *Change User* – opens the **WindoPath Welcome Window** allowing a different User to log in without having to reload **WindoPath**. If Lab-definition Site Security is enabled, **Change User** only allows the User to change to a User of the same lab. If the user attempts to change to a User of a DIFFERENT lab, the prompt **You may not change User to a different lab** will appear.

- *Change User and Disconnect* – disconnects from the database and opens the **WindoPath Welcome Window** allowing a different User to log in.

- *Change Electronic Signature* – opens a prompt to enter a new electronic signature for the Pathologist or Cytotechnologist of the current User.

- *Change Password* – opens the **Change Password Window** to modify the login password for the current User.

- *Set Preferences* – opens the **Preference List Window** described in *Chapter 15 – Preferences.*

- *Database Maintenance* – opens the **Deactivation Window**.

- *Management Reports* – opens a standard file selection window pointing to the defined directory path listing available Management Report Queries.

- *Take Data Snapshot* – *for Psyche Use Only.*

- *Create Support Form* – opens the **Support Form Window.**

Change Password Window

Select *Change Password* from the **Dispatcher Window** – *Manage Menu* to open the **Change Password Window** (Figure 5).

This window is used to modify the password for the User currently logged into **WindoPath**.
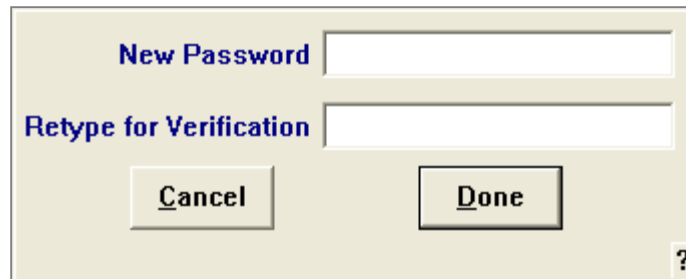
*Figure 5 – **Change Password Window***

Change Password Window Fields

- **New Password** – enter the new password.

- **Retype for Verification** – retype the new password to ensure they match.

Change Password Window Action Buttons

- **Cancel** – closes the **Change Password Window** without saving any changes.
- **Done** – closes the window saving changes.

NOTE: When changing a password, the password expiration date is automatically set to 90 days in the **User Window**.

Management Reports

Select **Management Reports** from the **Dispatcher Window** – *Manage Menu* to open the standard file selection window listing all management reports installed in the Management Reports folder of WindoPath on this PC. These reports were designed to help you meet CLIA and CAP requirements.

This menu can only be used if you are a Turnkey system. Hosted systems must install the management reports on their PC and will be unable to use this menu item.

Deactivation Window

Select *Database Maintenance* from the **Dispatcher Window** – *Manage Menu* to open the **Deactivation Window** (Figure 6).

The **Deactivation Window** allows you to specify the criteria for the deactivation of Patients, Visits and Cases.
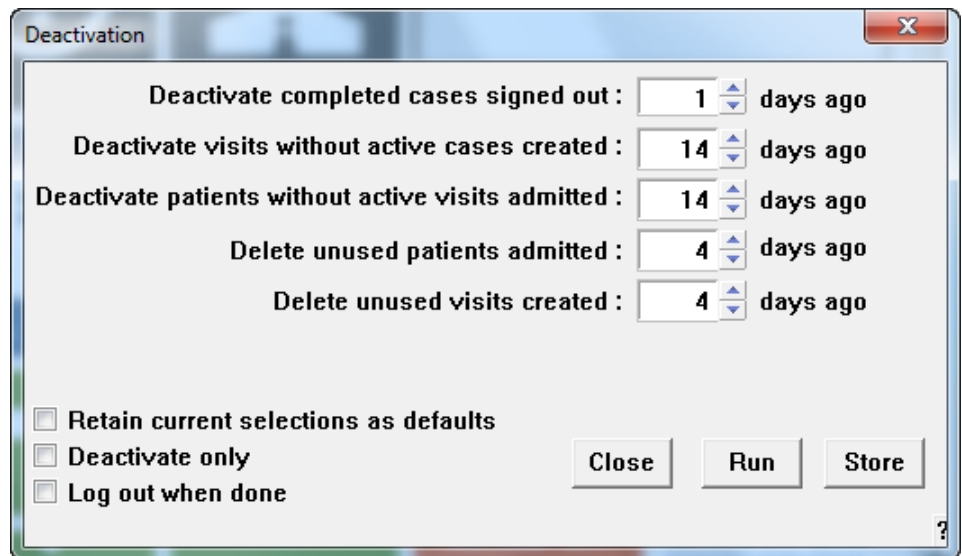
Figure 6 – **Deactivation Window**

When you start **WindoPath**, all active Patients, Visits and Cases are loaded into the PC's memory. The more active records there are, the longer the load time. System performance can be affected by the number of active Cases **WindoPath** has to maintain.

Each field in the **Deactivation Window** displays the number of days to keep the particular data active before **WindoPath** deactivates them.

Deactivation Window Fields

- **Deactivate completed cases signed out** – moves Cases from Current Cases to Archives after being at Needs Complete for x number of days. (Example: enter 10 to keep Completed Cases active for 10 days before deactivating.)

- **Deactivate visits without active cases created** – keeps Visits that have no corresponding Cases active for x number of days. (Example: enter 10 to keep Visits with no active Cases active for 10 days before deactivating.) *This function is used for labs with an ADT interface that automatically populates the database with Patient and Visit data.*

- **Deactivate patients without active visits admitted** – keeps Patients who have no corresponding Visits active for x number of days. (Example: enter 10 to keep Patients with no active Visits active for 10 days before deactivating.) *This function is used for labs with an ADT interface that automatically populates the database with Patient and Visit data.*

- **Delete unused patients admitted** – keeps Patients who never had a Visit created active for x number of days. (Example: enter 10 to keep Patients with no Visits for 10 days before deleting.) *This function is used for labs with an ADT interface that automatically populates the database with Patient and Visit data.*

- **Delete unused visits created** – keeps Visits that never had a Case created active for x number of days. (Example: enter 10 to keep Visits with no Cases for 10 days before deleting.) *This function is used for labs with an ADT interface that automatically populates the database with Patient and Visit data.*

- **Backup Audit trail starting –** moves items beginning with a certain date from the Audit Table into the Backup Audit Table. Clearing space in the Audit Table decreases the overall size of the database.

Deactivation Window Action Buttons

- **Close** – closes the **Deactivation Window** without starting the deactivation program. If the **Retain current selections as defaults** box is not checked, the deactivation parameters will not be saved.

- **Run** – starts the deactivation program.

- **Store** – stores the entered deactivation parameters as an automatic procedure. If you would like to use this option, please notify your trainer that you would like the deactivation process to be run automatically. The deactivation process can be resource intensive and therefore should be run when all Users are logged out of **WindoPath**.

Deactivation Window Check Boxes

- **Retain current selections as defaults –** stores the current entries so that they become the defaults the next time the deactivation program is run.

- **Deactivate only** – limits the deactivation process to deactivating cases only. Unused patients and visits are not deleted.

- **Log out when done** – once deactivation is complete, **WindoPath** will automatically log out the current User and the program will close. NOTE: Deactivation should be run from one PC while all others are logged out of **WindoPath**.

Support Form Window

Select *Create Support Form* from the **Dispatcher Window** – *Manage Menu* to open the **Support Form Window** (Figure 7).

The **Support Form Window** allows you to generate a form to report **WindoPath** software or computer hardware errors to Psyche Systems.

Fill out the form as completely as possible, explaining the problem in detail, including examples. Once the form is filled out, print the form and fax it to Psyche Systems at (208) 439-6722. **WindoPath** Software Support personnel will address the problem as soon as possible.

Figure 7 – **Support Form Window**

Support Form Window Fields

- **Facility Name** – the name of your laboratory is filled in automatically.

- **Your Name** – your User name is filled in automatically.

- **Date/Time** – the current date and time are filled in automatically.

- **Attention** – the correct entry (WP Support) is filled in automatically.

- **When did problem start** – enter a date and time or an occurrence which seemed to happen just before the problem. (Example, "...it started after we changed our report header...")

- **Frequency of problem...per** – enter the number of times the problem has occurred and select from the drop-down menu the period of time. (Example: hour, day, etc.)

- **The problem is reproducible** – check this box if you can reproduce the problem.

- **Urgency** – grade the urgency of the problem by selecting one of the following **radio buttons**:

  - Critical, system totally non-functional

  - Urgent, operations severely limited

  - Important, business can still function

  - Routine

- **Initial to authorize Psyche Systems to log on to your support PC or Server to examine problem** – enter your initials to authorize Psyche Systems to log on to your system.

- **Description of Problem** (include case number, patient number/names, etc.) – describe the problem in detail, including any examples to help Psyche Systems track down the problem. A minimum of 50 characters must be entered in order for **eMail and Print buttons** to become enabled.

- **Attachments** – enter the number of examples, lists, reports, etc. you are faxing in addition to the support form.

Support Form Window Action Buttons

- **eMail** – opens the PC's default e-mail program so the form can be e-mailed. This can only be used if you are a Turnkey system.

- **Print** – prints the form to the default printer.

- **Close** – closes the window without saving any changes.

Client Services Module

The **QA Data Window** (Client Services Module) allows you to log, track and update Internal and External Quality Assurance issues in your laboratory on a case-by-case basis.

Your lab can also create statistical management reports to retrieve QA data by Category and by User-defined Category Items. The User-defined Category Items should be built in the Phrases Library under the box name of the Category.

Select *QA Data* from the **Case List Window** – *Display Menu* to open the **QA Data Window** (Figure 8). Click on a Category in the **Category List Box** on the far left of the window that best describes your issue. This will display all of the User-defined Category Items for that Category in the **Item List Box** which is the second list box from the left. Select the appropriate item. This will enter the Category and Item in the **Flags List Box** on the right side of the window.

Figure 8 – **QA Data Window**

Once there is an entry in the **Flags List Box**, the User may enter a Description in the Description field. Click the Enter Description box above that field to enter the text in the **Flags List Box** under the Description column. If there is more than one entry in the **Flags List Box**, you will need to select the appropriate entry before typing a Description.

If desired, the User can select a Department and User for this item. Use the fields in the lower, left corner of the window. To populate these fields, click in the field, press **CTRL+L** and select the appropriate entry from the pop-up window.

Once the issue is ready for resolution, select the correct line in the **Flags List Box**, type a Resolution in the Resolution field and click the **Enter Resolution button**. The Resolution is entered in the Resolution column of the selected entry in the **Flags List Box**.

In order to mark the issue as resolved, you must click the **Resolved button** in the bottom, left corner of the window.

If the issue has not yet been resolved by clicking the **Resolved button**, a User may delete the entry in the **Flags List Box** by double-clicking the entry. A pop-up box will

ask if you want to delete the flag. Click **Yes** to delete the flag or **No** to cancel the deletion.

QA Categories

The Categories may be translated if desired. Please refer to *Chapter 15 – Preferences* for more information on the Translation Window.

Any Category that has the word **Immediate** in the name, cannot be signed out until the issue has been marked as Resolved. A cent symbol will appear next to the Need in the Case List Window. When the case is opened, a pop-up box will inform you that there is a Pending QA Resolution. Click **OK** to enter the case.

Any Category that does not have the word **Immediate** in the name, will follow the normal workflow. You will not receive a pop-up when you open the case and WindoPath will not prohibit a User from signing out the case. A dollar symbol will appear next to the Need in the Case List Window.

The default Categories are as follows:

- External QA Demographics
- External QA Immediate Attention
- External QA Misc
- External QA Specimen
- Internal QA Accessioning
- Internal QA Billing
- Internal QA Cancer Monitoring
- Internal QA Demographics
- Internal QA Immediate Attention
- Internal QA Misc
- Internal QA Specimen
- Internal QA TranscriptionPath Admin
- Problem
- QA Reason

QA Data Window Fields

- **Patient** – patient name.
- **DOB** – patient DOB.
- **Submitter** – submitting physician on the case.
- **Tel#** – patient telephone number.
- **Group** – physician group.
- **Accession** – displays case number.
- **Address** – displays submitter's address.
- **Received** – displays case received date.

- **Enter Department** – hit **CTRL+L** to select an item from the **Phrases Library, Department Box.** Displays in the **Flags List Box** in the **Department Column.**

- **Select User>** – hit **CTRL+L** to select an item from the **User Library** in **Human Resources.** Displays in the **Flags List Box** in the **User Column.**

- **Enter Description** – free text field for description. Then click the **Enter Description button.** Displays in the **Flags List Box** in the **Description Column.**

- **Enter Resolution** – free text field for resolution. Then click the **Enter Resolution button.** Displays in the **Flags List Box** in the **Resolution Column.**

QA Data Window List Boxes

- **Category List Box** – Displays 14 Categories which point to the **Phrases Library.** Each Category becomes a box name in the Phrases Library. In order to populate the Item List Box when a Category is selected Create your Category Items in the Phrases Library under the appropriate box name.

  - Categories may be translated in the Translation File. Please refer to *Chapter 15 – Preferences* for more information on the Translation Window.

- **Item List Box** – Displays any **Items** associated with the currently highlighted **Category.** Items are defined in the **Phrases Library.** To assign an **Item** to a case, click on it once in the **Item List Box.**

- **Flags List Box** – Displays any **Flags** assigned to the current case. List box columns display **Category, Item, Description, Resolution, Action, User and Department.**

QA Data Window Action Buttons

- **Resolved** – toggle button used to mark the current Flag as **Resolved** in the **Action Column** of the **Flags List Box.**

- **Unresolved** – toggle button used to mark the current Flag as **Un-Resolved** in the **Action Column** of the **Flags List Box.**

- **Enter Description** – after entering data in the **Enter Description** field, click the corresponding button, **Enter Description.** Displays in the **Flags List Box** in the **Description Column.**

- **Enter Resolution** – after entering data in the **Enter Resolution** field, click the corresponding button, **Enter Resolution.** Displays in the **Flags List Box** in the **Resolution Column.**

- **Next** – advances to the next case in the Case List Window.

- **Previous** – advances to the previous case in the Case List Window.

- **Done** – click to save changes and exit the window.

Site Security

The Site Security function allows Users from different locations to use the same database while only having access to their location's Cases.

If you wish to use the Site Security function, please notify your Account Manager, your Application Specialist or WindoPath Support to enable related reserved preferences.

How Site Security Works

WindoPath has the ability to handle data from multiple labs (sites) separately within one database. These capabilities are designed for case access security and to allow sites the ability to have unique entries in their libraries, human resources and report formats.

Site restricted users are assigned to a specific lab in the User Library. These labs must first be set up in the Lab Definition Library. When various library items are created, they are tagged with the assigned lab of the User. For the most part, these items will only be viewable by members of the same lab.

When accessioning a new case, only the visit is actually tagged with a lab. All other items (cases, specimens, diagnoses, etc.), are dependent upon the visit to which they are connected.

Depending upon preferences, the visit will be tagged with either the lab associated with the User doing the accessioning or the lab associated with the Pathologist assigned to the case. Only those individuals in that lab can see the visit and any cases attached to the visit.

A User logged in under the Omni User, will be able to see all visits, cases and library entries for all labs.

A User logged in under the All User, will be able to create library entries which all labs will be able to view. Those will be the only library entries this User will be able to view. They will not be able to view any visits or cases.

The Library, Human Resources and Report Format items that may be assigned a Lab Definition for Site-specific access are:

- Case Types
- Coded Phrases
- Source Definitions
- Paragraph Definitions
- Diagnosis Definitions
- Profiles
- Procedures
- Tables
- Pathologists
- Physicians
- Physician Panels
- Super Panels
- Users
- Report Format Items – footers, report definitions, report field templates, report section templates, report templates, mastheads and watermarks
- Vials
- Drug Definitions

- Patient MedRecNo – the MedRecNo will be tagged (depending upon preferences) with a lab but will be visible to all Users
- ZIP Codes – the code (zip code) will be tagged with a lab but will be visible to all Users

Site-Specific Access

The tables in the database that contain these items will have a column labeled **Lab**, which will contain a pointer to a row in the **Lab Definition Table** in the SQL database. In order for any of the above items to be flagged as belonging to a particular user site, one of two things needs to happen:

- A Site-restricted User creates one.
- A Master User created one and then flags it for a particular site.

WindoPath relies on having a unique code for all Human Resources. So when a site-restricted User creates an item, WindoPath ensures that the code used is unique. It will do this by appending the lab code to the item code. For example, if a site-restricted User from lab **ABC** creates a Diagnosis with the code **NEG**, WindoPath automatically changes the code to **NEG/ABC** prior to saving it in the database.

New Year Preparations

Every New Year, you will need to manually assign the Case number on the first Case of the year for each Case type. Change the year on that Case number to reflect the New Year and assign it an accession number. You can then resume auto assigning Case numbers.

If you are auto-assigning Case numbers…

You will need to manually assign the first Case number of the year *for each Case type*. From the **Accession Window** *Case Menu*, select *Auto-assign case numbers*. The checkmark will be removed from this menu item. The Case number boxes in the lower left of the window will display the Case letter prefix and the current year. When you are ready to save the Case, confirm that the year is correct, type the starting accession number and click **Save Case**. From the *Case Menu*, select *Auto-assign case numbers* again to reset the preference. You can now accession cases as usual with the Case numbers automatically assigned. Remember that you will need to repeat this procedure for the first Case of each Case type (Surgical, Pap, etc.)

If you are manually assigning Case numbers…

The Case number boxes in the lower left of the **Accession Window** will display the current year. You can manually assign Case numbers as usual.

Chapter 15 – Preferences

This chapter describes the various User-defined options available in **WindoPath**. These options, called preferences, include font choice for labels and lists, selected workflow options, default Pap Source and countless other parameters.

There are four types of preferences:

- **User** – defined separately for each User account in **Human Resources.**

- **Local** – defined separately for each PC.

- **Site Wide** – defined for the entire system (all Users and PCs).

- **Reserved** – defined for the entire system. Reserved preferences can only be set by Psyche or by using a password provided by Psyche.

User Preferences & Privileges

From the **Human Resources Window – Users tab**, highlight the desired User. Click **Open** to open the **User Window**. Select *Preferences/Privileges* from the *User Menu* to open the **User Preferences List Window** (Figure 1).

Preferences dictate how WindoPath looks and how features will behave for a User. (Example: automatically print preview, hide accession fields, random color, load only pap cases, show others on case list window, etc.)
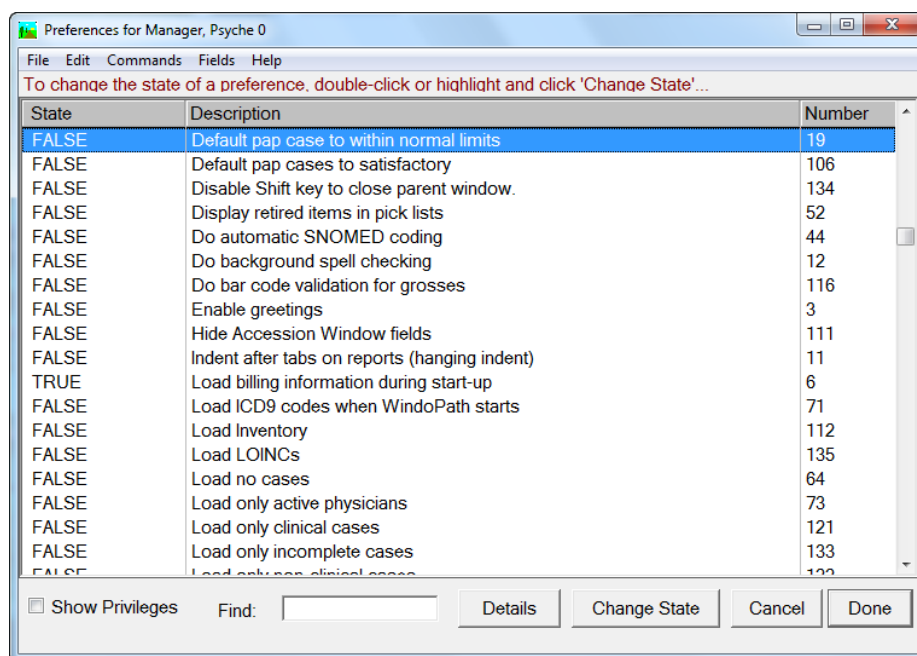
Figure 1 – **User Preferences List Window**

Privileges on the other hand, dictate what features a User will have access to in WindoPath. (Example: accessioner, database, delete specimens, human resources, librarian, report format, etc.) To view the User Privileges, click the Show Privileges checkbox in the lower, left corner of the window.

To change any Preference or Privilege, double-click on the line or click the **Change State button**.

For more information on WindoPath User Preferences & Privileges, please refer to the **WindoPath v8 System Preferences Handbook.**

User Preference List Window Find: field

The **Find: field** enables you to filter the **User Preferences** based Preference description.

User Preferences List Window

Each column in this window can be sorted in ascending or descending order. To sort in ascending order, right-click on the column heading. To sort in descending order, **SHIFT**+**right-click** on the column heading.

To change the order of the columns, individual Users may drag the column to a new location. To save this order for the current User only, click on the Fields menu and select Save Field Settings. You will receive a popup asking if you want to **Save Field Attributes**. Click **Yes** to save them or **No** to discard the changes.

- **State** – lists whether the preference or privilege is currently set to **True** or **False**.

- **Description** – brief description of the preference or privilege.

- **Number** – the assigned number of the preference or privilege.

User Preference List Window Action Buttons

- **Details** – opens a text window containing a detailed description of the preference highlighted in the **Preferences Window**.

- **Change State** – changes the state of the preference (**True** or **False**).

- **Cancel** – closes the **Preferences Window**.

- **Done** – closes the **Preferences Window**.

Local, Site Wide & Reserved Preferences

Local, Site Wide and Reserved Preferences are set from the **Preferences List Window**.

To open the **Preferences List Window**, select *Set Preferences* from the **Dispatcher Window** - *Manage Menu* (Figure 2). You must have *Manager* privileges to modify these preferences.

To change any Preference, double-click it in the **Preferences List Window**.

Preferences List Window

Each column in this window can be sorted in ascending or descending order. To sort in ascending order, right-click on the column heading. To sort in descending order, **SHIFT+right-click** on the column heading.

To change the order of the columns, individual Users may drag the column to a new location. To save this order for the current User only, click on the Fields menu and select **Save Field Settings**. You will receive a popup asking if you want to **Save Field Attributes**. Click **Yes** to save them or **No** to discard the changes.

- **Description** – brief description of the preference.
- **Code** – the assigned code of the preference.
- **Setting** – lists whether the preference is currently set to **True** or **False**.
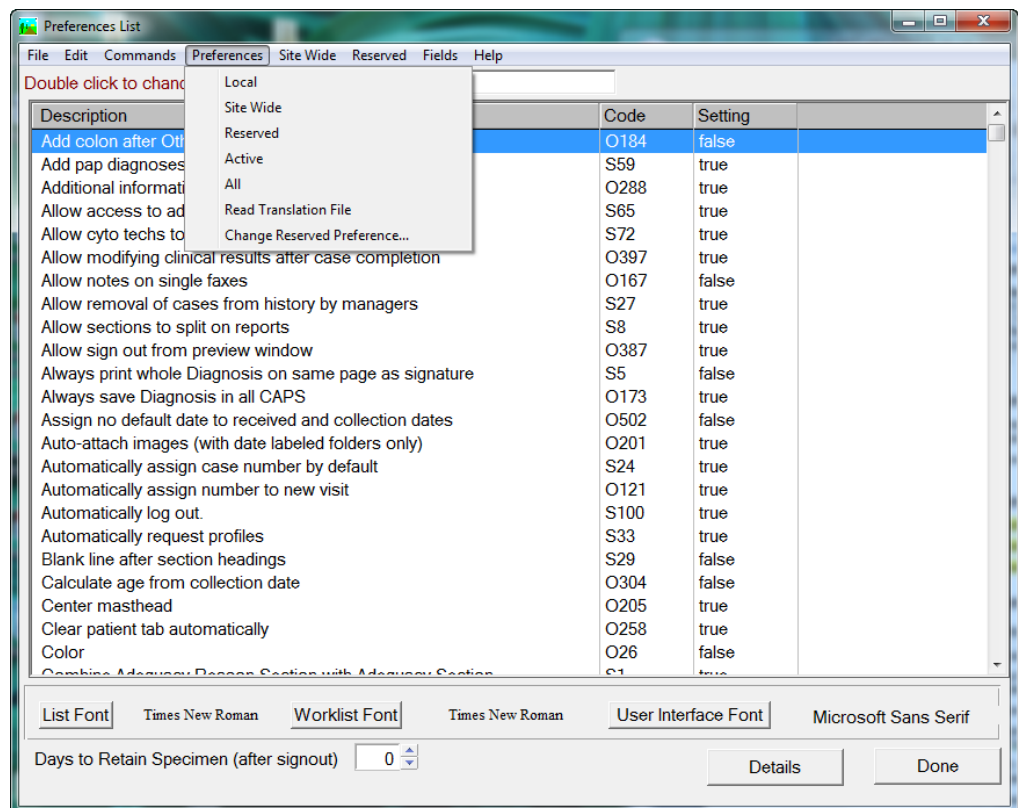
Figure 2 – **Preferences List Window (Local, Site Wide & Reserved Preferences)**

Preferences List Window Find: field

The **Find: field** enables you to filter the **Preferences List Window** based on entered criteria. The focus of the find box defaults to the first column (field) when you open the window. The focus can be changed by sorting a column or by dragging a column to a new location.

Since most Users look up preferences by descriptions, it is common to make the description column the first column and save the field settings using the Fields menu. This ensures that whenever you open the **Preferences List Window,** the focus of the find box will be the description column.

To filter the **Preferences List** to preferences containing the word **print**, make sure that the description column (**Find Description:**) is the focus of the find box. Type **print** in **Find Description**. The **Preferences List** will filter to include only preferences containing the word **print**. To return to the full **Preferences List**, delete all text from the **Find: field**.

Preferences List Window Action Buttons

- **Details** – opens a text window containing a detailed description of the preference highlighted in the **Preferences List Window**.

- **Done** – closes the **Preferences List Window**.

Preferences List Window Font Action Buttons

- **List Font** – opens the **Font Selection Window** (Figure 3), where the font, style and size for any printed case list is selected. Specifically, the font used in the **Daily Log** list, printed/previewed from the **Work List Menu** in the Case List Window. This is also the font used in the 3 histology worklists found in the **Procedure List Window,** *Worklists Menu*: **Print/Preview Worklist for Selected Procedures**, **Print/Preview Worklist by Case Number** and **Print/Preview Worklist by Profile**.

- **Worklist Font** – opens the **Font Selection Window** (Figure 3), where the font, style and size for any printed worklist is selected. Specifically, the font used in the **Case List** worklist, printed/previewed from the **Work List Menu** in the Case List Window. This is also the font used in the **Pap Worksheet** worklist, printed/previewed from the **Work List Menu** in the Case List Window.

- **User Interface Font** – opens the **Font Selection Window** (Figure 3), where the font, style and size for all windows is determined. This includes the font for checkboxes, action buttons, field names, column headers and column text.
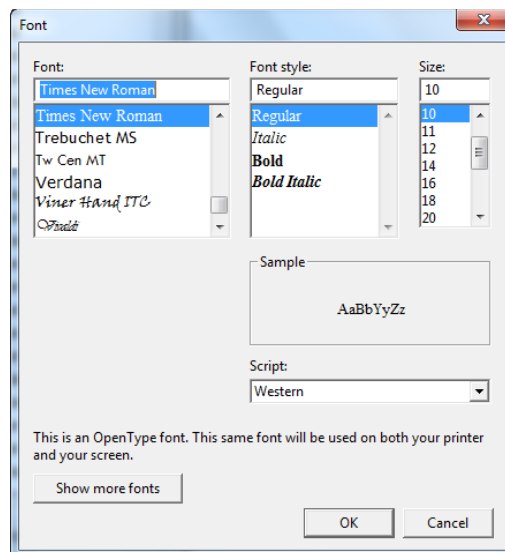
Figure 3 – **Font Selection Window (for List Font, Worklist Font & User Interface Font)**

Preferences List Window Menus

Preferences Menu

- *Local* – filters the **Preferences List** to include only local preferences.

- *Site Wide* – filters the **Preferences List** to include only site wide preferences.

- *Reserved* – for Psyche use only.

- *Active* – filters the **Preferences List** to include only preferences that are set to **True**.

- *All* – filters the **Preferences List** to include both local and site wide preferences.

- *Read Translation File* – instant refresh to Translation File changes.

- *Change Reserved Preference* – allows Users to change the setting of reserved preferences by entering the preference password provided by Psyche.

Site Wide Menu

The *Site Wide Menu* is described later in this chapter.

Reserved Menu

Items under the *Reserved Menu* can be set by Psyche personnel only.

Local Preferences

Select *Set Preferences* from the **Dispatcher Window** – *Manage Menu* to open the **Preference List Window** (Figure 4). By default, the list of site wide preferences is displayed. To view the list of local preferences, select *Local* from the *Preferences Menu*. The **Local Preferences List** is displayed. The settings specified in this window are stored locally on each PC.

To change any Preference, double-click it in the **Preferences List Window**. After modifying a Preference, it might be necessary to restart **WindoPath** to activate the change.

For a complete listing of all WindoPath Local Preferences, please refer to the **WindoPath v8 System Preferences Handbook.**
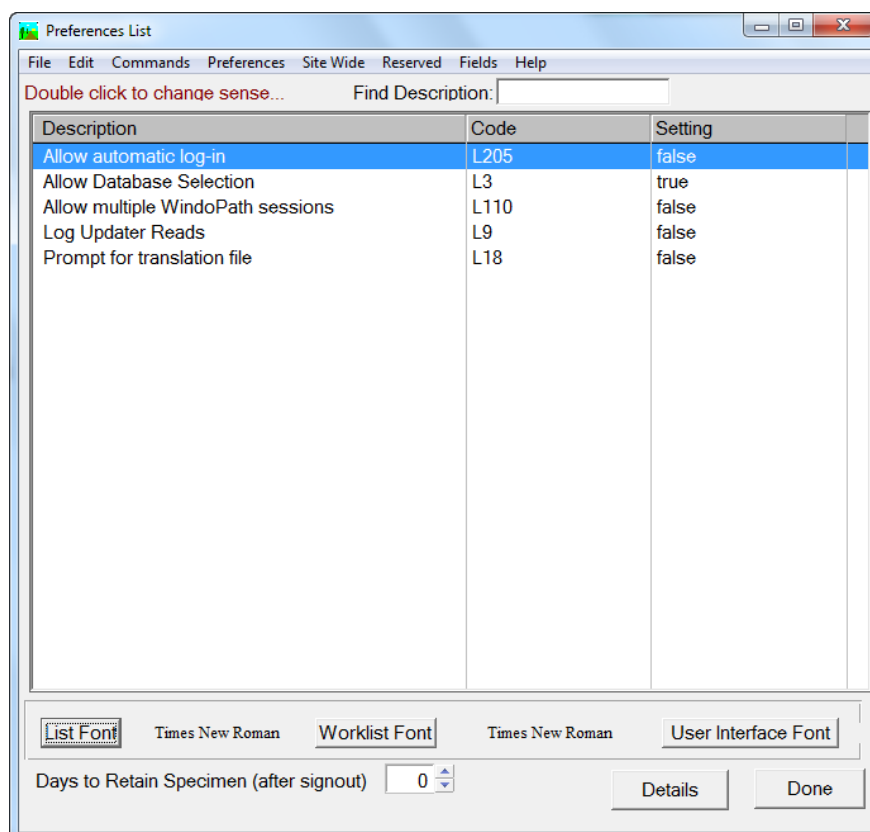
Figure 4 – **Local Preferences List**

Site Wide Preferences

Select ***Set Preferences*** from the **Dispatcher Window** – *Manage Menu* to open the **Preference List Window**. The **Site Wide Preferences List** opens (Figure 5). If the window is not already on Site Wide Preferences, select ***Site Wide*** from the *Preferences Menu*.

To change any Preference, double-click it in the **Preferences List Window**. After modifying a Preference, it might be necessary to restart **WindoPath** to activate the change.

For a complete listing of all WindoPath Site Wide Preferences, please refer to the **WindoPath v8 System Preferences Handbook.**
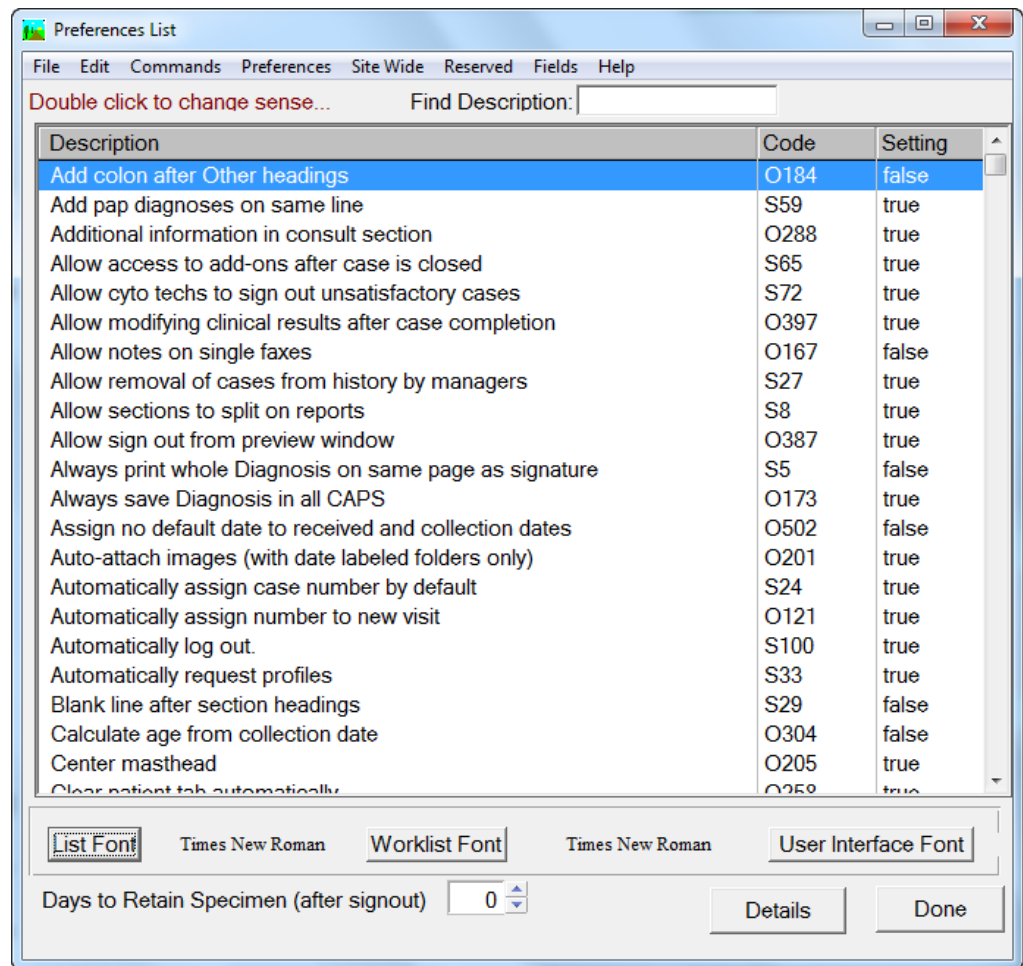
Figure 5 – **Site Wide Preferences List**

Site Wide Menu (Preferences)

Select *Set Preferences* from the **Dispatcher Window** – *Manage Menu* to open the **Preference List Window**. Select the *Site Wide Menu* from the **Preferences List Window.**

Site Wide Menu

- *Account Number Prefix* – a User-defined prefix (alpha or numeric) to the random number assigned when selecting automatic Account number assignment in the **Accession Window** – Visit tab.

- *Address Page Location...* – opens the **Address Location Window** where you can specify the exact location where the Physician's address should start printing on the Address Page, so that it shows through the window of your mailing envelope.

- *Automatic Case List Window Update Interval* – opens a box prompting the User to enter a value in the field titled **Case List Window Update Interval (0 = disabled)**. Default is set to 30.

- *Case List Window Colors > Special Flag Color* – opens the **Color Window**, where a color for cases marked with a Special Flag can be selected by the User.

- *Column Heading Color* – opens the **Color Window**, where a color for all Column Headings can be selected by the User.

- *Company Name* – the name of the hospital or laboratory. This data may be used to create customized headers on management reports.

- *Company Address Line 1* – the first address line of the hospital or laboratory. This data may be used to create customized headers on management reports.

- *Company Address Line 2* – the second address line of the hospital or laboratory. This data may be used to create customized headers on management reports.

- *Decrease font size to compress reports* – opens the prompt box **Points to decrease font size…** where you can specify the exact number of points to decrease font size on all reports printed. This allows the User to better achieve a single page report.

- *Default number of cases to retrieve during database lookup* – opens an entry box to specify the **Site Wide Default** of maximum number of Cases that may be retrieved by any query from the Archives Window. For example, if the maximum number of Cases is set to 100, only the first 100 Cases matching the entered lookup criteria will be displayed in the **Case List Box** regardless of how many Cases in the database actually meet the specified lookup criteria.

- *Default Pap Slide Count* – opens window where the default number of slides to be entered on Pap Cases can be set. Whole numbers or fractions can be entered.

- *Default Histology Printer* – opens a drop-down menu of available printers. If the User privilege **Automatic Histology Worklists** is set to **True**, worklists will be printed to the printer selected in this window.

- *Default Printer* – opens a drop-down menu of available printers. When printing collated reports, if any physician location does not have a valid printer selected, that location's reports will print to the printer selected in this window.

- *Default Specimen Label Printer* – opens a drop-down menu of available printers. When printing specimen labels, unless other specified, they will be sent to this printer.

- *Directories* – opens the **Path Specification Window** or **Directory Window** to specify the directory for files such as Documents, Images, Original Reports and many others. This will tell WindoPath where to look for an item or save an item. Various features may not work if WindoPath does not know the directory path.

- *Fax Printer* – opens a drop-down menu of available printers. When faxing reports, faxes are sent to the printer (fax queue) selected in this window.

- *Label Color* – opens the **Color Window**, where a color for all field labels can be selected for all Users. Example: the MedRecNo label for the MedRecNo field in the Patient tab of the Accession window; the Account label for the Visit Number field in the Visit tab of the Accession window.

- *Mandatory Field Color* – opens the **Color Window** where the color for Accession Window fields toggled as mandatory can be selected.

- *Prostate Colors* – opens the **Color Window** where a color for each of the 4 available Prostate Histogram Types can be defined on a Site-Wide level. There are 4 general Histogram Types, each has its own default color. Below are the options from this menu item as well as the Histogram Types and their default color:
  - Malignant Color – Red
  - High Grade PIN Color – Gold
  - Atypia Color – Gold
  - Benign Color – Blue
  - Reset to Default Colors – Resets all colors to their defaults

- *Space below field section on reports* – opens the prompt box **Amount of space after the fields on reports** where you can specify how much space to leave between the fields area and the first item in the sections area on the previewed and printed reports.

- *Minimum characters in password* – opens an entry box to specify the **Site Wide Default** of the *Minimum Characters in Password* each WindoPath User Account must have. For example, if the minimum number of characters in a password is set to 8, every WindoPath User Account must have a login password that is a minimum of 8 characters in length.

- *Default Section for Auto Image Capture* – opens a pop up drop-down menu allowing the lab to specify the **Default Section for Auto Image Capture**. The choices available include Gross, Microscopic, Diagnosis, Case and Other. For more information on *Auto Image Capture*, please refer to the section titled **Automatic Image Capture** in *Chapter 4 – Current Cases, Grossing and Result Entry.*

- *Default Printer for Specimen Block Labels* – not used.

- *Default Printer for Specimen Block Procedure Labels* – not used.

- *Log out time in seconds* – if the site wide preference **Automatically log out** is set to **True**, Users will be logged out of **WindoPath** if the system is idle for the number of seconds specified here. Labs can also set the number of seconds by individual User in the **User Auto Log Out Secs** field in the **User Window**.

- *Max white space to override not splitting report sections* – opens an entry box allowing the lab to specify the % value for **Split report sections if more than this % of white space**. Even when WindoPath is set to not split report sections across page boundaries, it is still possible that a section will be split. The determining factor is the amount of white space that would result by not splitting the section. If it is not splitting the report section results in more than a threshold percentage of the page being blank (white space), then WindoPath will split the section. This Preference Menu item allows this threshold to be set. The default is 40%.

- *Modify Translation* – opens the **Translation Window** to allow the modification of individual entries in the translation file used with **WindoPath** (Figure 6). Example: translate MedRecNo to Patient ID in the Patient tab of the Accession window.

- *Days to Look Back Printing History* – when printing the Related Cases section on reports, specifies the maximum number of days to look back in history. The default is 10,000 days.

- *Days to Extend Passwords* – the number of days to extend a password's expiration date.

- *Result Report Line Length* – if a Result Reporting Interface has been installed, specifies the maximum number of characters per line of the Result Report.

- *Review/Rescreen Percentages* – not used. This feature is now set in the **Case Types Library**.

- *Set Time Lab Day Starts* – the time of day the lab day starts. By default, the lab day starts at midnight.

- *Specimen Block QC Percentage* – the percentage of profiles (histology blocks) to be automatically flagged for QC. Management reports can be run to determine which blocks require QC.

- *SQL Statement for Patient Links* – displays the SQL statement used for determining the criteria for matching patients (same SSN, Name, DOB, City and Street). Users who are familiar with the SQL query language may modify this SQL statement.

- *SQL Statement for Secondary Links* – for Psyche use only.

Translation Window

The translation file enables the User to change the names of buttons and fields in WindoPath.

Please note that WindoPath will always refer to fields by their original names. The translation only changes the name for your view in WindoPath

Select *Modify Translation* from the **Preference List Window** – *Site Wide Menu.* The standard file selection window opens. The standard translation file is **WPTranslation.lng** and it should be selected by default. If necessary, click on the translation file you wish to modify and click **Open** to open the **Translation Window** (Figure 6).

Translation Window Columns

- **Original** – the default terminology for the selected word or phrase.

- **Translation** – the User-defined terminology for the selected word or phrase. Un-translated phrases are represented by **xxx**.

- **Symbol** – for Psyche use only.

Translation Window Fields

- **Original** – the default terminology for the selected word or phrase.

- **Trans:** – the User-defined terminology for the selected word or phrase. Un-translated phrases are represented by **xxx**.

- **Find Original** – text entry field. Text entered here is used to search the phrase list. The first matching entry will be brought to the top of the list.
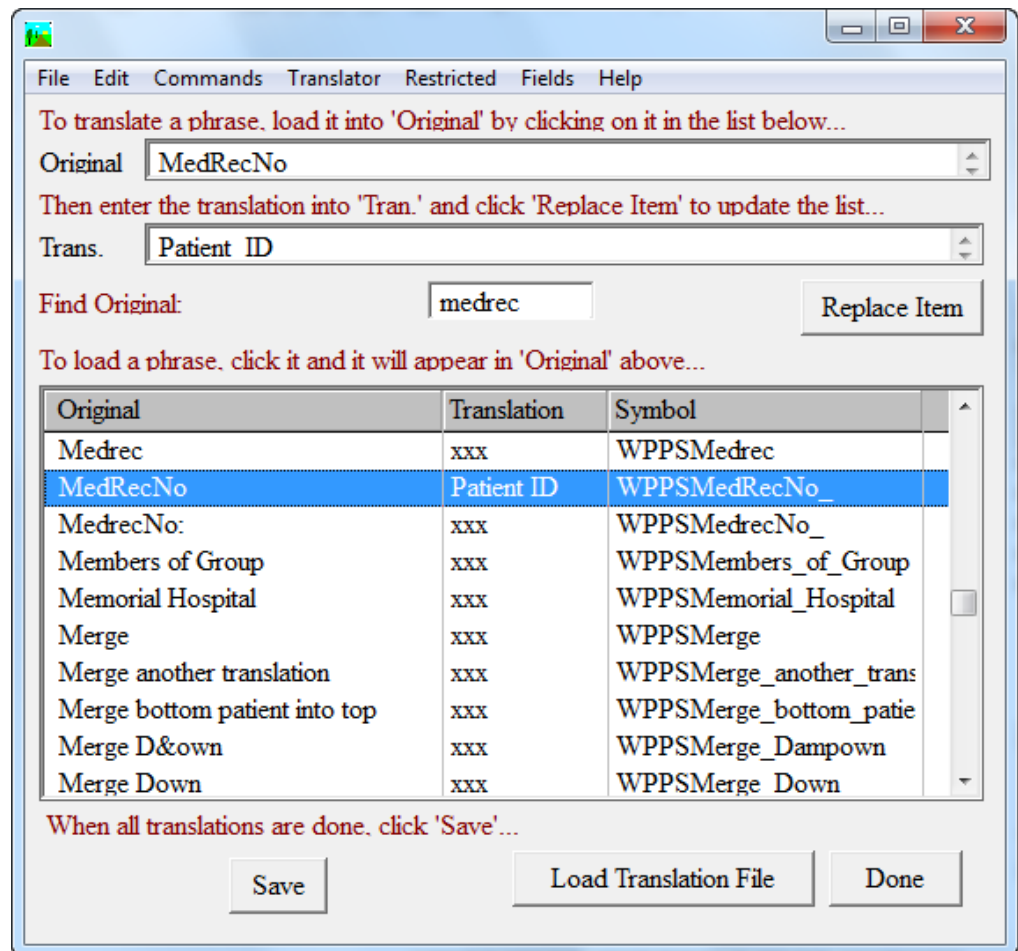
Figure 6 – **Translation Window**

Translation Window Action Buttons

- **Replace Item** – for the entry in the **Original field**, the text in the **Translation field** is replaced with the text typed in the **Trans. field**.

- **Load Translation File** – opens the standard file selection window to select and load the translation file of your choice.

- **Save** – saves all changes made to the current translation file.

- **Done** – closes the **Translation Window.**

Translation Window Menus

Translator Menu

- *Replace Translation Text* – **ALT+SHIFT+R** – for the entry in the **Original field**, the text in the **Translation field** is replaced with the text typed in the **Trans. field**. This is equivalent to clicking the **Replace Item button**.

- *Save Entire Translation File* – saves all changes made to the current translation file. This is equivalent to clicking the **Save button**.

- *Load and activate translation File* – opens the standard file selection window to select and load the translation file of your choice. This is equivalent to clicking the **Load Translation File button**.

- *Manually Add Translation Key* – **ALT+M** – for Psyche use only.

Restricted Menu

For Psyche use only.

Translating Words or Phrases

To translate a word or phrase, select *Modify Translation* from the **Preference List Window** – *Site Wide Menu.* Select your file and click Open to open the **Translation Window**.

- In the **Find Original: field**, type the word or phrase you wish to translate. This information is used to sort the **Translation Window** and bring matching entries to the top of the window.

- If necessary, click on the correct entry to bring it into the **Original** and **Trans. fields**.

- Select the text in the **Trans: field** and type the desired translation.

- Click the **Replace Item button**.

- The new terminology will be entered in the Translation column in the list box.

- Click the **Save button**. The standard file selection window opens. Click the **Save button** in that window as well.

- WindoPath will ask you if you want to replace the existing file. Click **Yes**.

- To exit the Translation Window, click the **Done button**.

Restore Translated Words or Phrases

To restore a translated word or phrase to its default terminology, select *Modify Translation* from the **Preference List Window** – *Site Wide Menu.* Select your file and click Open to open the **Translation Window**.

- In the **Find Original: field**, type the word or phrase you wish to restore. This information is used to sort the **Translation Window** and bring matching entries to the top of the window. Click on the entry you want to make it populate the **Original** and **Trans. fields**.

  - If you cannot remember the original terminology for the translated phrase, right-click Translation column heading in the list box. The **Find field** will now be named **Find Translation**. Look for any translated entries or type the translated entry in this field.

- Once you have the correct entry in the **Original** and **Trans. fields,** select the text in the **Trans field** and type **xxx** in lowercase.

- Click the **Replace Item button**.

- The new terminology will be entered in the Translation column in the list box.

- Click **Save Translation** to save your changes. The standard file selection window opens. Click the **Save button** in that window as well.

- WindoPath will ask you if you want to replace the existing file. Click **Yes**.

- To exit the Translation Window, click the **Done button**.

Reserved Preferences & Reserved Menu Preferences

Reserved preferences and Reserved Menu Preferences can only be changed by entering a password. Please notify Psyche Systems if you would like to enable any reserved preferences.

Chapter 16 – WindoPath CliniCAL

Since Clinical Pathology Cases are processed differently than Anatomic Pathology Cases, they are described separately in this chapter. The WindoPath CliniCAL Module is available as a standalone Clinical Laboratory software system.

However, laboratories may also utilize the WindoPath LIS as a fully integrated system for Clinical Pathology Cases and Anatomic Pathology Cases combined, allowing them to:

- Provide a seamless, full patient history

- Create fully integrated patient reports

- Expand their internal and external test menus

WindoPath CliniCAL allows the user to enter/accession patients, cases and clinical tests Manually, by Automatic Order Entry or by Reflex Test Ordering.

Results for clinical tests may be entered Manually by the user or Automatically using a Direct Results Interface from Clinical Instruments.

This chapter also discusses **Report Distribution** for Clinical Cases, as well as the set up required for WindoPath CliniCAL. This includes Libraries, Preferences, Case Types, Clinical Report set up and Label Formatting.

Set Up for Clinical Cases

Enabling the WindoPath CliniCAL Module

To enable the WindoPath CliniCAL Module, please ask your Application Specialist for assistance. He or she will set certain **Reserved Preferences** for you which will permit clinical processing in the WindoPath LIS database and make certain other preferences related to Clinical processing available.

Clinical Case Types

All clinical cases accessioned into WindoPath require the use of a **Clinical Case Type.** Please see *Chapter 11 – The Library* for more information.

All Clinical Case Types require the use of one of the 30 available **Clinical Case Classes**; for example, **Clinical1Case**, **Clinical2Case**, **Clinical3Case**, etc.

A Case Type's defined Case Class helps WindoPath determine specific workflows for cases, advance cases to specific case statuses and will enable other related functionality within the system.

Use of the **Clinical Case Class** will follow the specific **WindoPath CliniCAL Module's Workflow**.

- While accessioning a Clinical Case, after saving the case number on the Case Tab, the **Clinical Procedure Order Window** opens rather than advancing to the Specimen Tab on the Accession Window.

- Clinical Case Types do not require any result entry in the Quick Case Window (i.e. Gross, Microscopic, Diagnosis, etc.), but a user may still enter other important case data there if desired. Instead, all clinical tests ordered on a case are resulted in the **Procedures Results Window, Result Review Window** and/or the **Differential Count Window.**

- After accessioning, a Clinical Case's **Needs Status** will advance to **Needs Clinical Results** rather than **Needs Gross** as it does with surgical cases. Once every procedure on the clinical case has been resulted and advanced to Final Status, the **Case Status** will then advance from **Needs Clinical Results** to **Needs Final Report**. Thus, Clinical Cases do not require a signature.

Clinical Label Set Up & Formatting Requirements

Most Clinical Instruments and Processors have certain label requirements and specific label stock that are required for use.

Because all Clinical Labels will include a bar code, a set of **Bar Code Fonts** must be installed on every Workstation. The standard set of bar code fonts installed should include **128 Fonts**. For questions or assistance while installing bar code fonts on all workstations, please contact your WindoPath Application Specialist or your designated WindoPath System Engineer.

Standard WindoPath Bar Code Font & Bar Code Type

The set up for Clinical labels in WindoPath is defined in the **Formatter.** Click **Formatter** from the Dispatcher Window and then click the **Page Layout button** to open the **Page Layout Window** (Figure 1).
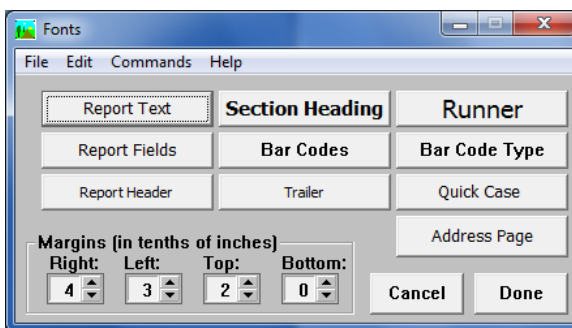
Figure 1 – **Page Layout Window**

Suggested Bar Code Settings

Click on the **Bar Codes button** to open the **Font Window** (Figure 2) to set the default bar code font.

- **Font:** Select the font labeled **Dan28 Code128**.

- **Font Style:** The Font Style that should be selected is **Normal**. (NOTE: **Bold** font style may distort the lines of the barcode.)

- **Size:** Start with **26**. (NOTE: This size may vary depending on the label stock size and label printer used.)
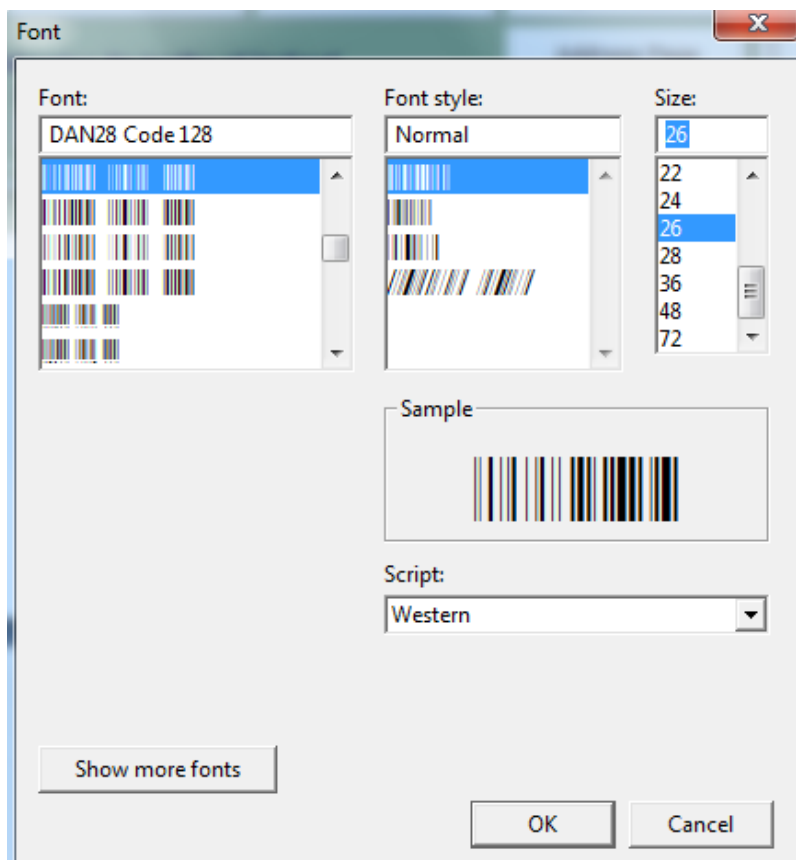
Figure 2 – **Font Window**

Suggested Bar Code Type Settings

In the **Page Layout Window,** click on the **Bar Code Type button** to open the **Bar Code Type Window** (Figure 3) to set the default bar code type. Select **Code 128** from the **Bar Code Type Drop Down Menu.** Do NOT use the checkbox labeled **Use Check Digit**.
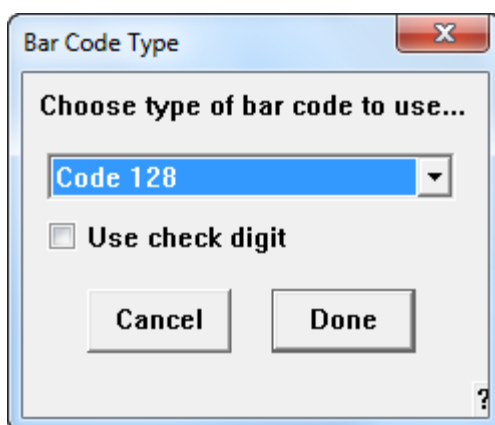
Figure 3 – **Bar Code Type Window**

Standard WindoPath Clinical Label Format

Refer to *Chapter 13 – The Formatter* for information on creating field templates for specimen labels.

The following is a suggested list of items that should be included on the average Clinical Specimen Label:

- Click the **Fields button** in the Formatter Window and click the **New button**. Enter a unique Code and Description for the new template.

- In the **Type** drop-down menu in the **Report Field Template Window**, select **Spec Label.**

- Enter all appropriate information in the **Label Data Window.** (Ex: Label stock width, height, etc.)

- Right click to open the list of available fields. To add a field to your label, double click on the entry on the left side of the window. This brings the entry to the right side of the window showing the selected fields which will appear on your label.

- **Required Field Tag:** The only required field tag that must be included is **Tag.SpecimenObjectID.** This is the tag that we want to display as a bar code on the label.

  - Once you have added this field to the list of selected fields, click the **Done button** to return to your Report Field Template Window.

  - Double click this field tag to open the Report Field Editor Window and modify the following settings for this tag:

  - Remove the label name Tag.SpecimenObjectID from the **Label** Field, leaving it blank.

  - In the **Length** Field, set the length to 35.

  - Check the **Bar Code Checkbox.**

  - Click the **Font button** and confirm that Font = **Dan28 Code128,** Font Style = **Normal** and Size = **26.** These are the same settings you entered in the Font window of the Bar Codes area of the Page Layout.

  NOTE: It is common practice to add the Tag.SpecimenObjectID field twice; one to be used as the actually bar code and the other to display the numerical value (or the Specimen Object ID) under the bar code itself.

- Select the additional **Label Field Tags** that you wish to display on your labels. Common field tags for clinical labels include but are not limited to the following:

  - Tag.condensedCaseNumber

  - Tag.patientName

  - Tag.patientSex

  - Tag.patientDOB

  - Tag.profileCodes

  - Tag.medicalRecordNumber

  - Tag.collectionDate

  - Tag.receivedDate

Human Resources Set Up for Clinical Processing

User Accounts

The following set up for Clinical Processing should be performed for each applicable user account in **Human Resources.** If the user will be using the **Differential Count Window**, a user-defined **Diff Keyboard** should also be created in Human Resources for that user account.

Defining a User Diff Count Keyboard

Each User will need to define keyboard stroke entries. NOTE: Clinical Procedures must be built before defining the user keyboard.

If a User has access to Human Resources, they may set up their own keyboard. Otherwise, the System Manager will need to set up the keyboard for each User.

- Open the User Account in Human Resources. Select **Define Diff Keyboard** from the *User Menu* to open the **User Keyboard Window** (Figure 4).

- The **User Keyboard Window** contains two columns, Key and Procedure. Each User may define up to 15 different keys and associated Procedures.

- In the Key Field enter the desired key board shortcut.

- In the Procedure Field enter the corresponding Procedure by hitting **CTRL+L** and selecting an item from the **Procedures Library**. All items in the **Procedure Field**s MUST be pulled in from the Library. See example below.
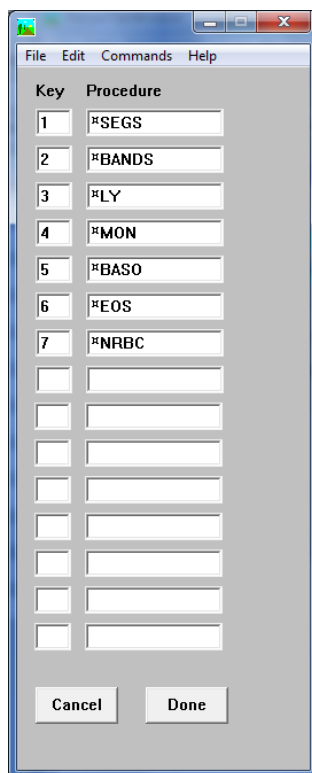
Figure 4 – **User Keyboard Window**

Pathologist Accounts

Although Clinical Cases do not require the signature of a Pathologist, it is common practice to set up a Pathologist Account in WindoPath for the lab's Laboratory Director. This Pathologist Account can then be set as the **Default Pathologist** in the Case Types Library for each Clinical Case Type created.

For this Pathologist Account, enter **Laboratory Director**, for example, in the **Title Field.** The Pathologist Account should be defined as a **Signer** (meaning that the **Cyto Only** checkbox is left un-checked). Please refer to *Chapter 10 – Human Resources* for information on how to create a Pathologist Account.

Physician Accounts

Please refer to the **Physicians** section in *Chapter 10 – Human Resources* for standard set up. There are default check boxes available related to Clinical Processing.

- **Send Partial Results –** enables partial result reporting for that physician. When all of the procedures on one profile have been resulted and advanced to their last step and there are multiple profiles on a case, a report is eligible for partial results. The case will go to a Need of Partial Report. Only after the last profile has been resulted and advanced, will the case go to Needs Final Report.

- **New Results Only –** when a case goes to **Needs Partial Report** and **New Results Only** is checked, the report will include only those results not already reported and any pending procedures. Previously reported results will not display on the report at this time. Once all of the profiles have been resulted and advanced, the final report will contain all of the results for all of the profiles.

WindoPath Clinical Libraries

All of the WindoPath Libraries are discussed in detail in *Chapter 11 – The Library.*

However, the libraries discussed in this section are **required** to be built when using the **WindoPath CliniCAL Module.**

Case Types Library

Refer to *Chapter 11 – The Library* starting with the section titled **Case Types Library** for information.

Open the **Librarian,** click the **Library** menu and select **Case Types.** Click **New** or **Open** to open the **Case Type Definition Window** (Figure 5).

Case Type Definition Window Fields

- **Code** – the User-defined code for the **Case Type**. This code must be unique.

- **Prefix** – the case number prefix may be up to 4 characters in length. This value is used in the case number itself. If the Prefix is **S**, then the case number for this case type would display as **S2014-001234**.

- **Case Name** – this is the case name that is used within WindoPath. It will appear in the **Case Name/Type** drop down menus located in the Dispatcher Window, Accession Window and Case List Window.

- **Print Prefix –** the prefix that will print on reports. This value may be different from the value entered for **Prefix** if desired.

- **Case Class –** each **Case Type** is required to have a unique **Case Class** assigned to it. The specified **Case Class** determines the workflow of the **Case Type** (i.e. Surgical versus Pap **Case Classes**).

- **Slide Count –** default number of slides for this **Case Type**. This is most commonly used for Pap, Cytology and Non-GYN **Case Types** to track daily cytotech productivity and slide counts. The value may contain a decimal.

- **Default Source** – default Specimen source for this **Case Type**. **NOTE: Clinical cases do not use a default source. Please leave this field blank.

- **Default Pathologist** – the default pathologist for a **Case Type** will automatically populate the **Pathologist** field in the Case Tab of the Accession Window when the case is accessioned.

Figure 5 – **Case Type Definition Window**

- **Label Specimens By** – drop down menu determines how you want your specimens labeled for this **Case Type** (numbered or lettered). This overrides the Site Wide Preference (O4) to **letter specimens instead of numbering** for this **Case Type** only.

- **Label Profiles By** – drop down menu determines how you want your specimen blocks labeled for this **Case Type** (numbered or lettered). This overrides the Site Wide Preference (O20) to **number specimen blocks instead of lettering** for this **Case Type** only.

- **Label** – select a procedure label for this case type. When you select Print or Preview Labels for Selected Procedures from the Labels menu of the Procedure List Window, all procedures for this **Case Type** will use the label format selected in the **Case Type** library.

- **Overdue Hours** – defined in WindoPath as the number of hours between accessioning and completing a case. Once WindoPath recognizes that a case is overdue, the case will display in a pink font in the **Case List Window** as a visual indicator. These cases can be filtered within the **Case List Window** by clicking the **Filter** menu and selecting **Overdue**. The focus of the **Find Field** will change to **Overdue**. Select **True** from the drop down menu. The **Case List Window** is now filtered for **Overdue** cases.

- **Review Percent** – percent of cases for this **Case Type** that should be randomly flagged for review by a pathologist.

Case Type Definition Window Action Buttons

- **Previous** – advances to previous **Case Type** in the **Case Types Library List Window**.

- **Next** – advances to next **Case Type** in the **Case Types Library List Window**.

- **Cancel** – cancels changes.

- **Done** – saves changes and exits window.

Case Type Definition Window Check Boxes

- **Auto-assign Case Numbers** – if checked, allows WindoPath to automatically assign sequential case numbers during accessioning.

- **Retired** – if checked, removes **Case Type** from active use. The **Case Type** is no longer displayed in the accession drop down but historic cases can be retrieved in archives.

- **Billing Hold** – not used.

Case Type Case Classes

- **Clinical** – this Case Class follows WindoPath's clinical workflow and thus, should only be used if WindoPath Clinical is enabled. When accessioning a Clinical case, WindoPath does not go to the Specimen Tab after saving the case. Instead, the Clinical Procedure Order Window opens. The Clinical Case Class does not require any result entry (Gross, Microscopic or Diagnosis) in the Quick Case Window, but a user may still do so if desired. When every procedure on the case has been resulted and advanced to its final procedure status, the case status will advance from **Needs Clinical Results** to **Needs Final Report**. Thus, the Clinical Case Class does not require a signature in the Quick Case Window.

Vials Library

Refer to *Chapter 11 – The Library,* starting with the section titled **Vials Library** for information.

Vials are used for Clinical cases only. The Vials Library contains all of the vials that may be used for processing clinical tests on various instruments and analyzers. Entries in the Vials Library are recommended for each vial that will have a Specimen Label printed for it.

From the **Librarian Window**, select **Vials** from the **Library Menu** to open the **Vials List Window.** Click **New** or **Open** to open the **Vial Definition Window** (Figure 6).

Each entry in this library should have a value entered in the **Code, Description** and **Size in ml.** The **Size in ml** field is important to include as this value is used to determine the number of vials needed and thus the number of labels required.

When you create your Profiles, you will have a chance to state how much of the Vial that Profile will use. WindoPath uses that number along with the amount in each Vial (size in ml) to calculate how many Vials all of your tests will require. If you print out labels for your Vials, WindoPath will use this number to determine how many Vial (specimen) labels to print.

Vials Definition Window Fields

- **Code** – the User-defined code for the **Vial**. This code must be unique.

- **Description** – the User-defined description of the **Vial**.

- **Size in ml** – how many units (ml) of the specimen (blood, urine, etc.) this vial should contain.

- **Label** – used to assign a default specimen label to a Vial Definition. Hit **CTRL+L** in the **Label** field to choose a **Label**.

Vials Definition Window Action Buttons

- **Cancel** – cancels changes and exits the window.

- **Done** – saves changes and exits the window.
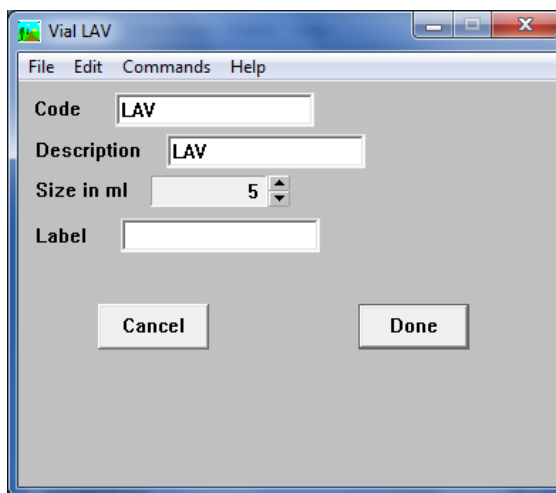
Figure 6 – **Vial Definition Window**

Phrases Library

Refer to *Chapter 11 – The Library* for information on the Phrases Library.

Box Libraries in the Phrases Library which are recommended for use in processing clinical cases are listed below.

- Profile Status
- Fasting
- Priority
- Workgroup
- Procedure Call Info
- Bill Type
- Performing Location
- Instrument

Sources Library

The **Sources Library** stores all Sources associated with Clinical tests.

A Source Definition used in Clinical Processing is only required to consist of a unique **Code** and a **Site** (or Description). There are only a small handful of Clinical Sources that need to be built in the **Sources Library**. Common examples are:

- Urine
- Stool
- Plasma
- Whole Blood
- Serum
- CSF
- Swab

Clinical Test Codes Library

The Clinical Test Code Library stores all clinical tests (and their respective ranges and values) which are later linked to Clinical Procedures and Clinical Profiles.

From the **Librarian Window**, select **Clinical Test Codes** from the **Clinical Menu** to open the **Clinical Test Codes List Window.** Click **New** or **Open** to open the **Clinical Test Code Definition Window** (Figure 7).

Clinical Test Code Window Fields

- **Code** – the User-defined code for the test. This code must be unique.
- **Name** – the User-defined name for the test.
- **Instrument** – the instrument on which this test runs. This field is important if you have an instrument interface. If you are unsure of the name of your instrument as used in the interface, please speak with your Psyche Interface person or your Implementation Specialist.

Figure 7 – **Clinical Test Code Definition Window**

- **Interpretations (+-)** – used for Toxicology cases only. For each test, if the result is equal to or greater than the Cutoff, the result will display on the report as Detected. If the result is less than the cutoff, the result will display on the report as Not Detected. The lab may choose to use different terms other than Detected and Not Detected.

- **CPT4>** – not used.

- **Units** – the unit of measure used for the test.

- **Delta %** – the lab can define the percent of change t when displaying historical results of this test.

- **Abs** – this represents an absolute value of the change (delta) instead of a percent of change.

- **Cutoff** – used for Toxicology cases only. This is amount to which the test result will be compared. For each test, if the result is equal to or greater than the Cutoff, the result will display on the report as Detected. If the result is less than the cutoff, the result will display on the report as Not Detected.

- **Maximum** – used for Toxicology cases only. This is the maximum amount that can be shown for the result of this test. If the result is higher than the maximum, it will display on the report as greater than this amount.

- **Decimals** – allows you to determine how many decimal places you want for the result of each test.

- **Seq #** – determines the order of the tests when using the External Clinical Result Table Format Section.

- **Report Section** – determines the header name for tests using the External Clinical Result Table Format Section.

- **Allowed (commas)** – allows the lab to define acceptable results. If a result does not match one of the entries, it will not be accepted. If there are multiple entries, they must be separated with a comma.

Clinical Test Code Window Check Boxes

- **Lab Supply** – for use with Outreach.

- **Use BLLQ** – this is Below Lower Limits Quantitative. The result is between the cut off value and 20% below that amount. If this box is checked, no result is displayed in the result column but the Interpretation column will say BLLQ.

- **Disallow Order By** – A user will not be allowed to manually order this test.

- **Do not flag as Abnormal** – this allows you to tell WindoPath that not all tests are normal or abnormal. A pregnancy test, for example, if positive, is not abnormal.

Clinical Test Code Window List Boxes

- **Ranges List Box** – lists all of the ranges your lab has defined for this test.

Clinical Test Code Window Action Buttons

- **Add** – opens the **Clinical Range Definition Window** allowing the user to add a new Range.

- **Delete** – deletes the selected Range from the Range List Box.

- **Previous** – advances to the previous **Clinical Test Code Definition Window**.

- **Next** – advances to the next **Clinical Test Code Definition Window**

- **Cancel** – cancels changes and exits the window.

- **Done** – saves changes and exits the window.

Each Clinical Test Code created may have one or more **Clinical Ranges** associated with it. To create a **Clinical Range**, click the **Add button** on the **Clinical Test Code Window** and the **Clinical Range Window** will open (Figure 8).

Figure 8 – **Clinical Range Window**

Clinical Range Window Fields

- **Range Title** – the User-defined title or name for the range. This will display in the **Ranges List Box**.

- **Range Fields – Normal** – normal low range (numeric). This test result can be equal to or greater than this low range and will be considered **Normal**. If the test result is less than this amount, the result will be **Low**.

- **Range Fields – To** – normal high range (numeric). This test result can be equal to or less than this high range and will be considered **Normal**. If the test result is greater than this amount, the result will be **High**.

- **Range Fields – or Alpha** – normal alphabetic range (i.e. positive or negative). If the result text matches this text, the result will be considered **Normal**. If the result text is anything other than the *Normal Alpha Range* or the *Critical Alpha Range*, it will be considered **Abnormal**.

- **Range Fields – Critical** – critical low range. If the test result is less than the normal low range and greater than or equal to this number, it will be considered **Low**. If the test result is less than this number, it will be considered **Critical Low**.

- **Range Fields – To** – critical high range. If the test result is greater than the normal high range and less than or equal to this number, it will be

considered **High**. If the test result is greater than this number, it will be considered **Critical High.**

- **Range Fields – Alpha** – critical alphabetic range. If the result text matches this text, the result will be considered **Critical.** If the result text is anything other than the *Normal Alpha Range* or the *Critical Alpha Range*, it will be considered **Abnormal**.

- **Sex** – use this to determine which range should be used based upon the patient's sex. Normal test results can be different depending upon the sex of the patient.

- **Low Age** – use this to determine which range should be used based upon the patient's age. Normal test results can be different depending upon the age of the patient. This is the lowest age for this range.

- **High Age** – use this to determine which range should be used based upon the patient's age. Normal test results can be different depending upon the age of the patient. This is the highest age for this range.

- **Race** – not used.

- **Species** – not used.

- **Fasting Status** – not used.

- **Menstrual Stage Low** – not used.

- **Menstrual Stage High** – not used.

- **Diet** – not used.

- **Range Text** – not used.

- **Sequence Number** – the order in which this range is checked.

For processing clinical cases in WindoPath, Clinical Test Codes should be built for all tests that are included in Normal Profiles, Manual Differential Profiles, Manual Differential Morphology Profiles and tests that are processed as Individual Orderables. Examples of **Common Clinical Test Codes** are listed below:

- RBC, Red Blood Cell Count (Normal Profiles)

- SEGS, Segmented Neutrophils (Manual Differential Profiles)

- MICRO, Microcytosis (Manual Differential Morphology Profiles)

- CL, Chloride Serum (Individual Orderables)

Library Build Recommendations for Tests Used in Normal Profiles:

- Code
- Name
- Instrument
- Units
- Delta%
- Decimal
- Ranges

Library Build Recommendations for Tests Used in Manual Differential Profiles:

- Code
- Name
- Units

Library Build Recommendations for Tests Used in Manual Differential Morphology Profiles:

- Code
- Name
- Allowed (commas)

Procedures Library

Refer to *Chapter 11 – The Library* for information on the Procedures Library.

In WindoPath, the term **Procedure** is often used interchangeably with the terms **Histology Slide**, **Stain, Test** or **Clinical Test.**

Generally speaking, a **Procedure** is created to define individual **Cytology Slides, Histology Stains, Immunohistochemical (IHC) Stains, Molecular Tests** and **Clinical Tests.**

Examples of **Procedures** would include **H&E, Alcian Blue, CEA, CD15, HPV16, Thin Prep, WBC** and **RBC** to name a few.

Click **New** or **Open** on the **Procedure List Window** to open the **Procedure Definition Window**.

For Clinical processing, you will build one Procedure for each Clincial Test. Once Procedures are entered into the library, they are then added to Profiles which can be selected from the **Clinical Procedure Order Window** simply by clicking on the entry.

The **Procedure Definition Window** contains numerous fields, list boxes and buttons; too many to fit all in one window. For this reason, the **Procedure Definition Window** contains a **More button** which when clicked, opens a secondary window containing additional fields and buttons for that Procedure (Figures 9 & 10).

Click the **More button** to open the extended **Procedure Definition Window**.

Procedure Window Fields

- **Code** – a User-defined code for the procedure. This code must be unique.

- **Clinical Code>** – (for Clinical Procedures ONLY) the clinical code associated with this procedure. Press **CTRL+L** to display entries from the **Clinical Test Code Library**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **Description** – a User-defined description for the procedure.

- **Work Group** – the work group assigned to the procedure. Press **CTRL+L** to display entries from the **Phrases Library – Work Group Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

Figure 9 – **Procedure Definition Window**

Figure 10 – **Procedure Definition Window Extension**

- **Status** – displays entries from the **Phrases Library – Profile Status Box**. These are the steps each procedure must go through to become complete or finished.

- **Alt. Code –** an alternate **Procedure code** can be placed here if the one used in the **Code field** does not match that used by an instrument or other system. An interface would use this field instead of the **Procedure code field**.

- **LOINC** – default LOINC associated with the procedure.

- **Report Group –** (for Clinical Procedures ONLY) the report group allows you to group profiles on the reports. Press **CTRL+L** to display entries from the **Report Group Library**. To select a library entry, highlight it and click **Select** or press **ENTER.** This feature is used in conjunction with the **Internal Clinical Results by Group** section in the Report Formatter.

- **Slide Label** – the text that will print in the Tag.slideLabel field on Procedure Label in the Report Formatter. You can type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Procedure Slide Label Box**. To select a library entry, highlight it and click **Select** or press **ENTER**. If there is no slide label text for a particular procedure, the Tag.slideLabel field will print the procedure code.

- **Warning Msg** – a warning message or disclaimer associated with this procedure. This corresponds with the **Warning Message** section in the Report Formatter. The text typed in the Warning Msg field will display in the **Warning Message** section on the report.

- **Table** – if you want a specific table to be entered on every procedure of this type, click the drop-down menu to display entries from the **Tables Library** and select the appropriate table. When a procedure of this type is ordered on a Case, the selected table is automatically entered on the procedure.

- **Overdue In** – number of default hours in which a procedure becomes overdue if that procedure is not at its final step or status.

- **Default Slide Count** – the default number of slides for this procedure.

- **Stainer Code –** the code of the stainer to which an interface should send this procedure (i.e. Dako Stainer).

- **Make Digital Images** – used with Aperio integration for digital slide imaging.

- **Text for Result Report** – (for Clinical Procedures ONLY) default text for result report for this procedure. The text will display in the **Result Text (read only)** field of the **Procedure Result Window**.

Procedure Window List Boxes

- **Status** – lists each processing step for this procedure. Each step is listed in the order in which it is performed. To add a status to the list, click the drop-down menu and select the desired status from the list which appears below the field. The selected status is displayed in the **Status List Box**. To delete a status from the list, highlight the status and click **Delete**. To move a status up from its current position in the list, highlight the status and click **Up** until the status is in the desired position. To move a status down from its current position in the list, highlight the status and click **Down** until the status is in the desired position. Each procedure must have at least one associated status.

- **Diagnosis Code** – (for Clinical Procedures ONLY) lists all Diagnosis definitions to be displayed in the **Diagnosis List** when using **CTRL+L** in the **Diagnosis/Interpretation field** of the **Procedure Result Window** on procedures of this type. To add a Diagnosis definition to the list, click **Add** to display entries from the **Diagnosis Library**. Highlight one or more Diagnosis definitions and click **Select** or press **ENTER**. The selected Diagnosis definitions are displayed in the **Diagnosis Code List**. To delete a Diagnosis from the list, highlight the Diagnosis and click **Delete**.

- **Workload Code** – lists all charges to be automatically added when this procedure is ordered. For Clinical cases, charges are added to the Profiles instead of the Procedures. Therefore, it is recommended that this area is left blank.

Procedure Window Action Buttons

- **Add** – adds the status in the **Status field** to the **Status List**; opens the **Diagnosis Library**; opens the **Charges Library**.

- **Delete** – deletes the highlighted status from the **Status List**; deletes the highlighted diagnosis from the **Diagnosis Code List**; deletes the highlighted charge code from the **Workload Code List**.

- **Up** – moves the highlighted status up in the **Status List**.

- **Down** – moves the highlighted status down in the **Status List**.

- **Previous –** advances to previous procedure.

- **Next** – advances to next procedure.

- **Cancel** – cancels changes.

- **Done** – saves changes and exits window.

- **More** – opens the **Secondary Procedure Window** for this procedure.

Procedure Window Radio Buttons

- **Clinical Case Type** – flags the procedure as clinical. This is used in conjunction with the option of **Include Clinical** in the **Procedures** menu of the **Procedure List Window**. When **Include Clinical** is checked, clinical procedures will display in the **Procedure List Window**. When **Include Clinical** is unchecked, clinical procedures will not display in the **Procedure List Window**.

- **Histology Case Type –** flags the procedure as histology (non-clinical). This is used in conjunction with the option of **Include Histology** in the **Procedures** menu of the **Procedure List Window**. When **Include Histology** is checked, histology procedures will display in the **Procedure List Window**. When **Include Histology** is unchecked, histology procedures will not display in the **Procedure List Window.**

- **Both –** flags the procedure as both clinical and histology. This is used in conjunction with the options of **Include Histology** and **Include Clinical** in the **Procedures** menu of the **Procedure List Window**. Procedures flagged as both will display in the **Procedure List Window** regardless of which option is checked or unchecked. It is only when both **Include Histology** and **Include Clinical** are unchecked that these procedures will not display. This will also result in no procedures displaying in the **Procedure List Window.**

Procedure Window Check Boxes

- **Require Use Flag** – not used.

- **Requires Validation** – flags the procedure as requiring gross validation. Used in conjunction with the user preference *Do Bar Code Validation for Grosses* (116). If user preference 116 is set to **False**, the validation feature can be invoked by clicking the **Modify** menu in the **Quick Case Window** and selecting the **Validate** option.

  If **Requires Validation** is not checked and user preference 116 is set to **True**, the user will be required to scan the case number bar code and the specimen bar code for validation. If **Requires Validation** is checked, the user will be required to scan the case number bar code, the specimen bar code and the specimen block bar code for validation.

- **Retired** – check this box to flag this Procedure as inactive. This Procedure will not appear in the **Procedures List** when pressing **CTRL+L** in any field that accesses the **Procedures Library**.

- **Do not print** – check this box if you do not want this procedure to print in the **Internal Clinical Results** section on reports.

- **Graph** – (for Clinical Procedures ONLY) allows results of this procedure to be graphed. This works in conjunction with the **Clinical Graphs** section in the **Report Formatter**.

- **Require Sign Out** – procedure will require a signature to advance the status to complete.

- **Do Not Print In History** – (for Clinical Procedures ONLY) allows results of this procedure to be put into a history display on the report. This works in conjunction with the **Clinical History by Day** and **Clinical History by Test** sections in the **Report Formatter**. The default is to have this checkbox checked. You must uncheck this box to display history of the results of this procedure.

Profiles Library

Refer to *Chapter 11 – The Library* for information on the Profiles Library.

In WindoPath, the term **Profile** is often used interchangeably with the terms **Panel** (Clinical Panels) and **Block** (Histology Block).

Generally speaking, a **Profile** is created to define the group of **Procedures** or **Clinical Tests** that are routinely ordered together.

For example, a common Clinical Profile would be a CBC (Complete Blood Count) and would include the following **Procedures:** WBC, RBC, HGB, HCT, MCV, MCH, MCHC, RDW, RDE-SD, PLT and MPV.

Click **New** or **Open** on the **Profile List Window** to open the **Profile Window** (Figure 11).

Once profiles are entered into the library, they can be quickly selected from the **Clinical Procedure Order Window** simply by clicking on the entry.

The **Profile Window** contains numerous fields, list boxes and buttons; too many to fit all in one window. For this reason, the **Profile Window** contains a **More button** which when clicked, opens a secondary window containing additional fields and buttons for that Profile (Figures 11 & 12).

Profile Window Fields

- **Code** – a User-defined code for the profile. This code must be unique.

- **Source –** (for Clinical Profiles ONLY) this is the Specimen source to which this profile applies (i.e. Blood, Urine, etc.).

- **Seq**. **No. –** the sequence number of this profile. The sequence number determines the order that profiles are printed in the Internal Clinical Results section on reports.

- **Designation** – a User-defined designation for the profile (for example, BLOCK, SLIDE or PANEL). Click the drop-down menu to display entries from the **Phrases Library – Profile Designation** box.

- **Description** – a User-defined description for the profile.

- **Procedure>** – used to select the procedures that are ordered when the profile is requested. Press **CTRL+L** to display entries from the **Procedures Library**. To select a library entry, highlight it and click **Select** or press **ENTER**. You cannot type free text in this field. After selecting a procedure, it will appear in the **Procedure field**. Click **Add** to add the procedure to the **Procedure List**.

- **Alt. Code –** an alternate **Profile code** can be placed here if the one used in the **Code field** does not match that used by an instrument or other system. An interface would use this field instead of the **Profile code field**.

- **Instrument** – the instrument that this profile is run on. You may type free text in this field or press **CTRL+L** to display entries from the **Phrases Library – Instrument Box**. To select a library entry, highlight it and click **Select** or press **ENTER**.

- **LOINC** – LOINC associated with this profile.

- **Vial>** – (for Clinical Profiles ONLY) Vial associated with this profile. Press **CTRL+L** to display entries from the **Vials Library**.

- **Next Profile>** – next profile to be ordered after a user orders this profile.

- **Pref. Loc.** – default performing location.

- **Bill Type** – default bill type.

- **Priority** – default priority (for example, STAT or Routine).

- **Type –** drop-down field allows the user to identify a Profile as **Molecular**. If a Profile is defined as **Molecular** in this field, this Profile will be reported using molecular-specific Report Sections in the Formatter.

- **Amount –** (for Clinical Profiles ONLY) the amount of sample needed to run all of the procedures in this profile. This corresponds with the Vial. If you have a 10 unit Vial and your Profile requires15 units (amount), you will receive labels for two Vials.

- **Text for Result Report –** default text for the given profile. Please note that it will display on the report.

- **Special Requirement –** (for Clinical Profiles ONLY) default special requirement note for the given profile. When a profile is ordered, if this field contains text and if it is ordered through the **Clinical Procedure Order Window** (Accession Window), a dialog box will appear with this text. This is the only time you will see this message.

Figure 11 – **Profile Definition Window**

Click the **More button** to open the extended **Profile Definition Window**.
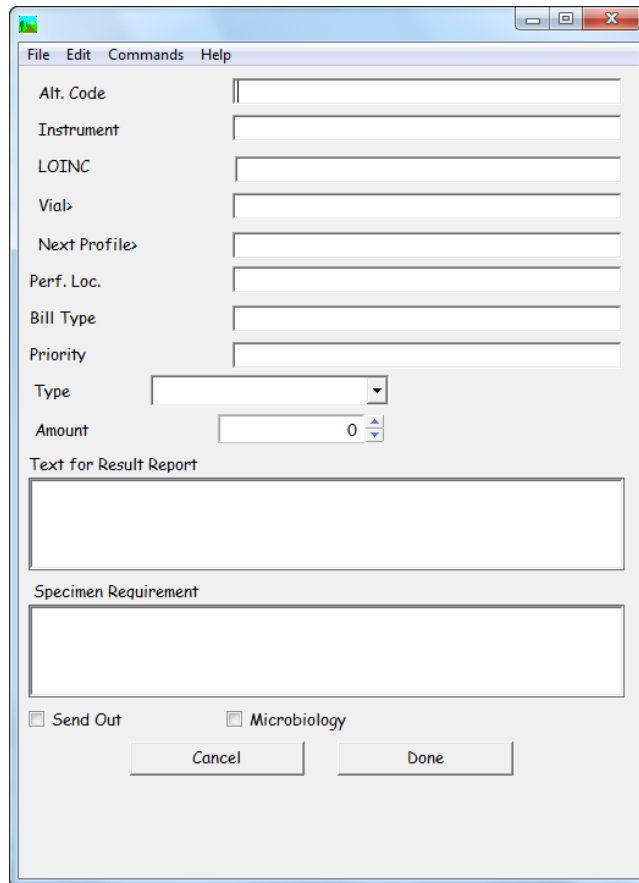
Figure 12 – **Profile Definition Window Extension**

Profile Window List Boxes

- **Procedure/Profile List Box –** lists all Procedures and/or Profiles to be automatically ordered on each profile of this type.

  To add a procedure to the list, press **CTRL+L** in the **Procedure>** field to display entries from the **Procedures Library**. To select a library entry, highlight it and click **Select** or press **ENTER**. You cannot type free text in this field. After selecting a procedure, it will appear in the **Procedure>** field. Click **Add** to add the procedure to the **Procedure List**. To delete a procedure from the list, highlight the procedure and click **Delete**. Each profile must have at least one associated procedure. An unlimited number of procedures may be added to a profile.

  All of the above is also **True** if you want to add or delete a **Profile** to the **Profile Window List Box**, with the one exception being that **CTRL+L** is entered in the **Profile>** field rather than the **Procedure>** field.

- **Workload Code (Charges) List Box –** lists all of the Charge Codes to be automatically ordered on each Profile of this type. To add a Charge Code, click **ADD** to display entries from the **Charges Library**. To select a library entry, highlight it and click **Select** or press **ENTER**. The selected **Charge Code** will appear in the **Workload Code List Box**.

  NOTE: When working with Clinical Profiles, it is recommended that you add default Charge Codes to the Profile. This is because when processing Clinical specimens, the tests are ordered as Profiles rather than as individual Procedures.

Profile Window Action Buttons

- **Add** *(Procedure/Profile List Box)* – adds the procedure or profile in the **Procedure>** field or **Profile>** field to the **Procedure List**.

- **Delete** *(Procedure/Profile List Box)* – deletes the highlighted procedure from the **Procedure List**.

- **New** *(Procedure/Profile List Box)* – opens the **Procedure Window**, allowing a new procedure to be added to the library.

- **Set Index** *(Procedure/Profile List Box)* – opens a prompt to enter an Index Number for the currently highlighted Procedure in the list. The **Index Number** that is set for each item determines the order in which all items listed are displayed.

- **Add** *(Workload Code List Box)* – opens the **Charges Library List Box** displaying all entries from the **Charges Library.**

- **Delete** *(Workload Code List Box)* – deletes the highlighted charge code from the **Workload Code List Box**.

- **Previous –** advances to previous profile.

- **Next –** advances to next profile.

- **Cancel** – cancel changes.

- **Done** – saves changes and exits window.

- **More –** opens the **Secondary Profile Window**.

Profile Window Check Boxes

- **Retired –** check this box to flag this profile type as inactive. This profile type will not appear in the **Profile List** when pressing **CTRL+L** in any field that accesses the **Profiles Library**.

- **Send Out –** check this box to flag this profile type as inactive. This profile type will not appear in the **Profile List** of the **Clinical Procedure Order Window** or the **Procedure List Window**. Additionally, it will not appear in the **Profile List** when pressing **CTRL+L** in any field that accesses the **Profiles Library**.

- **Microbiology –** flag profile as **Microbiology.**

Super Panels Library

Refer to *Chapter 11 – The Library* for information on the Super Panels Library.

Super Panels are used for Clinical cases only. The Super Panels Library allows the user to define different combinations of profiles enabling the user to order multiple profiles all at once.

Select Super Panels from the Library Menu to open the Super Panels List Window. Click New or Open to open the Super Panel Definition Window (Figure 13).
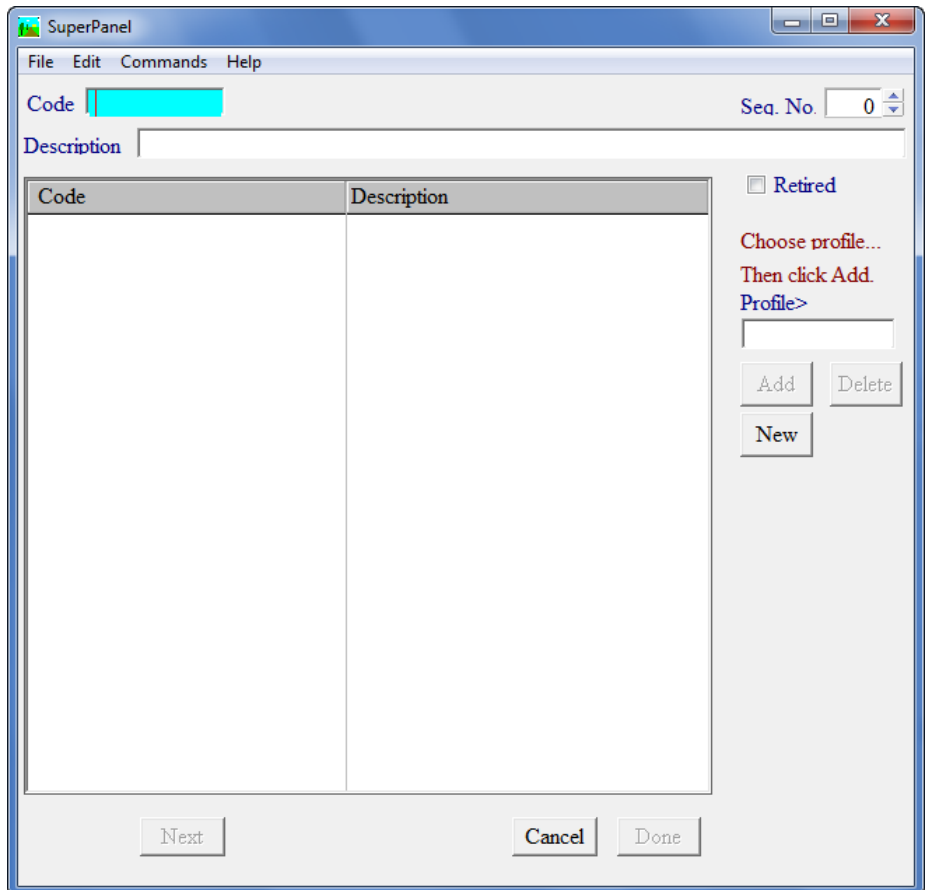
Figure 13 – **Super Panel Definition Window**

Super Panel Window Fields

- **Code** – the User-defined code for the **Super Panel**. This code must be unique.

- **Description** – the User-defined description of the **Super Panel**.

- **Seq. No.** – not used. The sequence on reports is determined by the Profiles or Report Groups depending upon the elements used.

- **Profile>** – used to select the profiles that will be part of this **Super Panel**. Press **CTRL+L** to display entries from the **Profiles Library**. To select a library entry, highlight it and click **Select** or press **ENTER**. You cannot type free text in this field. After selecting a profile, it will appear in the **Profile field**. Click **Add** to add the profile to the **Profile List**.

Super Panels Window List Box

- **Profile List** – lists all of the **Profiles** that make up this **Super Panel**.

Super Panels Window Action Buttons

- **Add** – adds the profile in the **Profile>** field to the list.

- **Delete** – deletes the highlighted profile from the list.

- **New** – opens the **Profile Definition Window** and allows the user to create a new Profile.

- **Previous –** advances to previous **Super Panel**.

- **Next** – advances to next **Super Panel**.

- **Cancel** – cancels changes and exits the window.

- **Done** – saves changes and exits window.

Physician Panels Library

Physician Panels are only used with **Clinical Case Classes**.

Each **Physician Panel** consists of one or more **Super Panels. Super Panels** consist of multiple profiles**.**

The **Physician Panels** are linked to a Physician in the **Physician Library**. Each **Physician Panel** can be used many times. However, each Physician can have only one **Physician Panel**.

If there is a **Physician Panel** assigned to the Submitter, you will be limited to only those **Super Panels** which make up the **Physician Panel** for this Submitter. If there is no **Physician Panel** assigned to the Submitter, you will be able to select any **Super Panel**.

Click the Library menu and select the Physician Panels option to open the Physician Panels List Window. Click New or Open to open the Physician Panels Definition Window (Figure 14).

Physician Panels Definition Window Fields

- **Code** – the **Physician Panel** code. This code must be unique.

- **Description** – the description of the **Physician Panels**.

- **Seq. No.** – not used.

Physician Panels Definition Window List Boxes

- **Super Panel** – lists all of the **Super Panels** that make up this **Physician Panel**.

To add a **Super Panel** to the list, press **CTRL+L** in the **Profile>** field to display entries from the **Super Panel Library**. To select a library entry, highlight it and click **Select** or press **ENTER**. You cannot type free text in this field. After selecting a **Super Panel**, it will appear in the **Profile>** field. Click **Add** to add the **Super Panel** to the **Super Panel List**. To delete a **Super Panel** from the list, highlight the **Super Panel** and click **Delete**. Each **Physician Panel** must have at least one associated **Super Panel**. An unlimited number of **Super Panels** may be added to a **Physician Panel**.

Figure 14 – **Physician Panel Definition Window**

Physician Panels Definition Window Action Buttons

- **Add** – adds the **Super Panel** in the **Profile>** field to the **Super Panel List**.

- **Delete** – deletes the highlighted **Super Panel** in the **Super Panel List**.

- **New** – opens the **Super Panel Definition Window** and allows the user to create a new **Super Panel**.

- **Previous –** advances to previous **Physician Panel**.

- **Next** – advances to next **Physician Panel**.
- **Cancel** – cancels changes.
- **Done** – saves changes and exits window.

Physician Panels Definition Window Checkboxes

- **Retired –** check this box to flag this **Physician Panel** as inactive. This **Physician Panel** will not appear in the **Physician Panel List** when pressing **CTRL+L** in any field that accesses the **Physician Panel Library**.

Reflex Test Library

Refer to *Chapter 11 – The Library* for information on the Reflex Test Library.

Many pathology and clinical laboratories frequently order follow-up tests when certain results are observed when resulting. This is known as **Reflex Testing**. Reflex tests are used to clarify or elaborate on primary test results. WindoPath can automatically initiate the ordering of a reflex test for a case. This is known as a **Reflex Rule**. User Privilege 118, **Modify Reflex Rules**, must be set to **True** for the user to access the Reflex Tests Library.

From the **Librarian Window**, select **Reflex Rules** from the **Library Menu** to open the **Reflex Test List Window.** Click **New** or **Open** to open the **Reflex Test Definition Window** (Figure 15).

Reflex Test Window Fields

- **Code** – the User-defined code for the reflex test. This code must be unique.
- **Description** – the User-defined name for the reflex test.
- **Logical Statement –** statement specifying reflex parameters. Use **ALT**+**I** to insert items from lists. Position the cursor and use **ALT**+**I** to insert a field. Highlight a part of a rule and use **ALT**+**B** to add brackets.
- **Order this Profile> –** hit **CTRL+L** to select from the Profiles Library. If the Reflex Rule is triggered, this Profile will be ordered automatically. Specify the Profile Designation in the drop-down menu adjacent to this field.
- **Cancel Profile> –** hit **CTRL+L** to select from the Profiles Library. If the Reflex Rule is triggered, this Profile will be cancelled automatically.
- **Cancel Proc>** – hit **CTRL+L** to select from the Procedures Library. If the Reflex Rule is triggered, this Procedure will be cancelled automatically.
- **Insert this Comment in Profile –** if the Reflex Rule is triggered, this Comment will appear below the Procedure name and print on the report.
- **Display this Message>** – if the Reflex Rule is triggered, this Message will display in a pop up.
- **Add this Flag** – drop-down menu displays items from the **Customer Service Module (QA).** If the Reflex Rule is triggered, a Customer Service Flag will be assigned automatically.
- **Mathematical Statement –** mathematical statement specifying result calculation. Result will be inserted in ordered Profile.

Figure 15 – **Reflex Test Definition Window**

Reflex Test Window Action Buttons

- **Check** – opens a dialog box determining if the statement entered is legal or illegal. If the statement is legal, the message **Successful Evaluation to False** is displayed. If the statement is illegal, it will display as such.

- **Next** – opens the next reflex test in the **Reflex Test List Window**.

- **Previous** – opens the previous reflex test in the **Reflex Test List Window**.

- **Cancel** – closes the **Reflex Test Window** without saving any changes.

- **Done** – closes the **Reflex Test Window** saving any changes.

Creating a Reflex Rule

The first step in creating a reflex test is figuring out what it is that you want it to do. Example: "Whenever a clinical case has a Triglyceride that is critical high (>300), automatically order a Low Density Lipoprotein Profile." This information is what WindoPath will consider as criteria that must be met for it to automatically order the defined profile.

1) Enter a Code and Description. Please note that Codes should always be one word. To mimic a space, feel free to use hyphens or dashes. The Description has no such limitations.

2) In the large text box in the middle of the window, you must enter the test's specific criteria as a **Logical Statement**. The **Reflex** Menu has 2 items to assist in the mathematical statement: **Insert** and **Add Brackets**.

3) Select **Insert** from the Reflex Menu. The Report Field Selection Window will open. Similar to how all of the fields are listed in the Formatter when creating a Field Template, every report field in WindoPath is listed in the **Report Fields** list box to the LEFT of the window (Figure 16).

4) For this example, first scroll down the first column (Report Fields) list and find the item with the Type = **Case** and the Item = **Casetype**.

5) Simply double click on that item; the window will close and you will be brought back to the Reflex Test window. You will notice that **Case.caseType** has been added to the large text box (Figure 16).
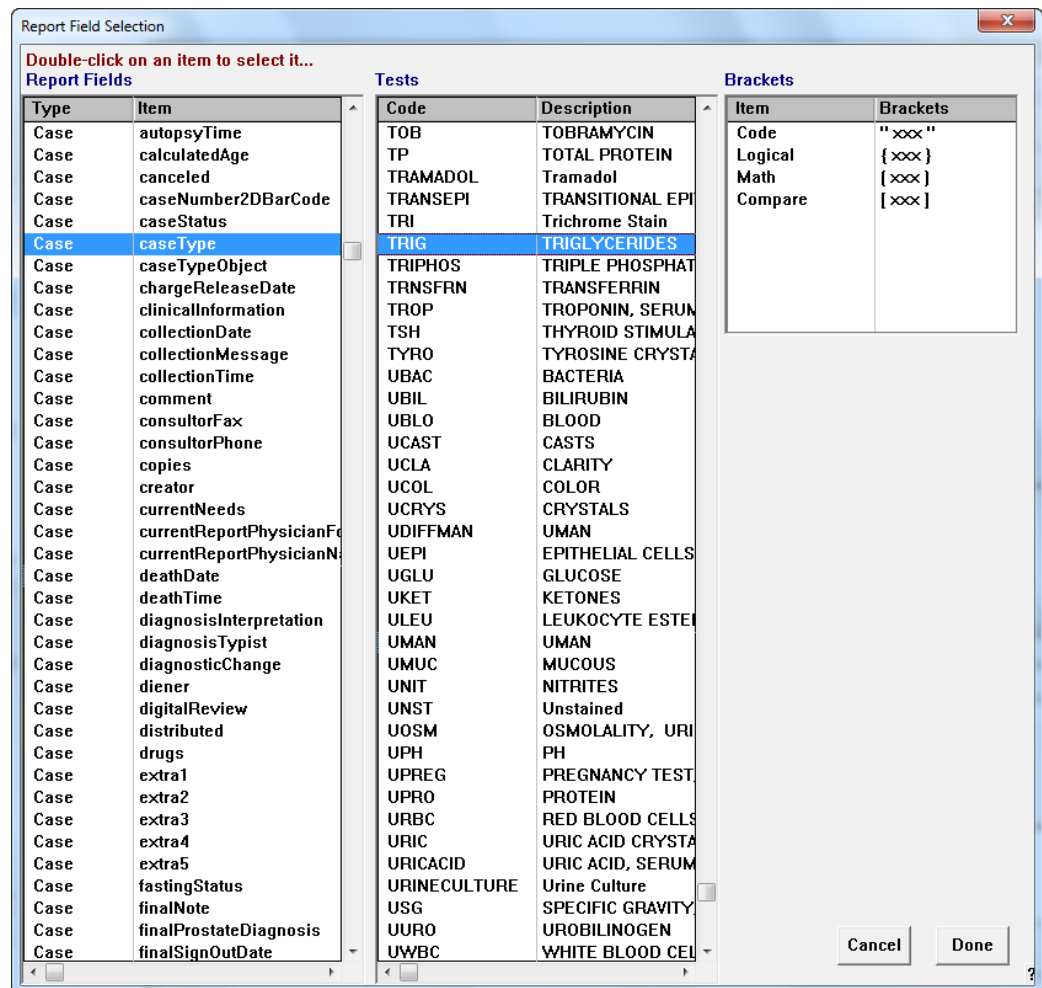
Figure 16 – **Report Field Selection Window**

6) Put your cursor in the text box to the right of "Case.caseType" and enter a space followed by "= Clinical1Case."

Ex: "Case.caseType" = Clinical1Case

This is a part of the following logical statement: "Whenever a clinical case has a Triglyceride that is critical high (>300), automatically order a Low Density Lipoprotein Profile."

7) Because this is only a part of the equation, you need to put the item in brackets. Highlight the entire phrase and select **Insert Brackets** from the Reflex Menu.

8) Next, enter a space and enter the AND symbol **&** as the logical operator. Enter another space.

9) Repeat steps 3 and 4 from above, except this time, scroll down the second column (Tests) and find the Test where Code = TRIG and the Description = TRIGLYCERIDES.

10) Simply double click on that item; the window will close and you will be brought back to the Reflex Test window. You will notice that **"TRIG"** has been added to the large text box.

11) Position your cursor after this text, enter a space, enter the GREATER THAN symbol **>**, enter another space and then enter **300**.

   Example: "TRIG" > 300

   This is a part of the following logical statement: *"Whenever a clinical case has a Triglyceride that is critical high (>300), automatically order a Low Density Lipoprotein Profile."*

12) Put this second item in brackets as was done with the first item in step 7 above. So far, your logical statement should look like the following:

   ["Case.caseType" = Clinical1Case] & ["TRIG" > 300]

13) The final step in the creation of your logical statement is to enclose the entire statement above in a set of brackets. To do this, highlight the entire expression and select **Insert Brackets** from the Reflex Menu as you did in steps 7 and 12.

   Your logical statement should now look like the following:
   {["Case.caseType" = Clinical1Case] & ["TRIG" > 300]}

   **TIP: The logical statements that you create for your Reflex Rules are like the mathematical equations that are seen in basic Algebra. For example, we all know that (3 + 2) / 4 is very different from 3 + (4 / 2). In other words, where you place the brackets in your logical statement is very important.

14) In the **Order this profile>** field (Figure 17), enter **CTRL+L** and select the appropriate item from the Profiles Library. In this example, you would choose the **LDL** profile.

   This is a part of the following logical statement: *"Whenever a clinical case has a Triglyceride that is critical high (>300), automatically order a Low Density Lipoprotein Profile."*

15) Click the **Done button** to save. When you do this, WindoPath will check to see if your Reflex Rule is logical or not. If it is logical, it will display **Successful evaluation to False** (Figure 18) in the window that appears. Click the **Done button**.

   If it is NOT logical, the window will display what is wrong with the statement. Example: **Illegal Statement** or **Unmatched curly brackets**.

   **NOTE: If WindoPath does NOT display Successful evaluation to False in the window, the user should know that the statement is invalid and needs to be modified.

16) When the check is finally successful, click **Done**. You have just successfully created a Reflex Test.

Figure 17 – **Reflex Test Definition Window**

Figure 18 – **Compilation Window**

Triggering a Reflex Rule

For Clinical Cases, it is not necessary to assign Reflex Rules to physicians.

Once a result matching the criteria of the Reflex Rule is entered and the status of the Procedure is advanced to its last step, the Reflex Rule will automatically initiate.

Using the example in Figure 17, the prompt *Reflex order LDL* appears. Click **Yes** to allow WindoPath to order the reflex test. A second prompt will appear saying *Reflex this Order*. Click **Ok**.

If you open the Procedures Window, you will see that the LDL Profile has been added.

Accessioning Clinical Cases

Prior to accessioning a case, select the appropriate case type from the drop down on the Dispatcher Window. In the **Accession Window**, populate the Patient and Visit tabs as described in *Chapter 3 – Accessioning*. Enter the appropriate data in the Case tab and save the Case. After the Case number is assigned, the **Clinical Procedure Order Window** opens allowing the user to order clinical tests.

Clinical Procedure Order Window

The **Clinical Procedure Order Window** lists all available Clinical Profiles and Super Panels as well as any Specimens, Profiles and Procedures already ordered on the Case (Figure 19).

Procedure Order Window Fields

- **Collected** – the date and time the specimen was collected. These are auto populated when the Clinical Procedure Order Window opens.

- **Received** – the date and time the specimen was received. These are auto populated when the Clinical Procedure Order Window opens.

- **Find** – to find a specific profile in the **Profile Selection List**, enter one or more characters for the start of either the code or the description in the **Find: field.** The selection list will be filtered to those profiles matching the entered criteria. The **Find: field** is located directly above the Super Panel Selection List Box.

- **Priority** – processing priority for the selected Profile (i.e. STAT, Routine, etc.) In order to obtain entries for this drop down menu, they must be entered in the Phrases Library, Priority Box.

- **Performing Location** – where the Procedures of the selected Profile will be performed. In order to obtain entries for this drop down menu, they must be entered in the Phrases Library, Performing Location Box.

- **Bill Type** – category of insurance for the selected Profile (i.e. Self Pay, Private Insurance, Medicare, etc.) In order to obtain entries for this drop down menu, they must be entered in the Phrases Library, Bill Type Box.

Figure 19 – **Clinical Procedure Order Window**

Procedure Order Window List Boxes

- **Specimens List Box** – lists all of the specimens already ordered on the case. Specimens are tied to Profiles in the Profile Library. Therefore, when you order a Profile, the Source is brought over with it and attached to the case.

- **Super Panel Selection List Box** – lists available Super Panels which can be added to the case. A Super Panel is a collection of one or more Profiles. They are built in the Super Panel Library. These work in conjunction with Physician Panels. Physician Panels are a collection of one or more Super Panels. If a Physician Panel is attached to a Physician (Physician Library, Panel field), then this window will only show the Super Panels that were included in that Physician Panel. If a Physician Panel was not attached to the Physician, this window will show all Super Panels.

- **Profile Selection List Box** – lists available Profiles which can be added to the case. Only Clinical Profiles will display in this window. Clinical Profiles have an attached Source in the Profile Library.

- **Specimen Profiles List Box** – lists all profiles associated with the selected Specimen in the **Specimen List Box.**

- **Profiles List Box** – lists all profiles associated with all Specimens on the case.

- **Procedures List Box** – lists all procedures associated with all profiles on the case. If you select one of the Profiles in the Profiles List Box, the associated Procedures will be highlighted.

- **Vials List Box -** lists the vial type and the count of each vial needed to complete all of the ordered tests for this case. Vials are first set up in the Vials Library. They are then attached to each clinical Profile in the Profiles Library, **More button**, Vial> field.

Procedure Order Window Action Buttons

- **Order** – not used.

- **Save** – saves changes and keeps the Clinical Procedure Order Window active.

- **Not Rec'd** – the vial was not received. All Sources, Profiles and Procedures for this Vial are deleted. You will be prompted to enter a reason. Type your reason and click the **Done button**.

- **Expand** – opens the Procedure List Window for this case.

- **Exit** – closes the Clinical Procedure Order Window saving all changes.

- **Labels** – used to print specimen labels. After printing, the Clinical Procedure Order Window closes and all changes are saved.

- **Cancel** – closes the Clinical Procedure Order Window without saving any changes.

Clinical Orders Menu

- **Case Collection Message** – used to add a message to the case (Figure 20). This message can appear on the report. Use Case.collectionMessage in the Field area of the Formatter.

- **Specimen Collection Message** – used to add a message to the specimen. This message can appear on the report. Use Specimen.collectionMessage in the Field area of the Formatter.

- **Preview Profile Labels** – not used.

- **Print Profile Labels** – not used.

- **Preview Specimen Labels** – used to preview Requisition and Vial labels. The format for these are built in the Fields area of the Formatter using the Specimen Label type. Refer to *Chapter 13 – The Formatter* for information on Label Formats.

- **Print Specimen Labels** – used to print Requisition and Vial labels. The format for these are built in the Fields area of the Formatter using the Specimen Label type. Refer to *Chapter 13 – The Formatter* for information on Label Formats.
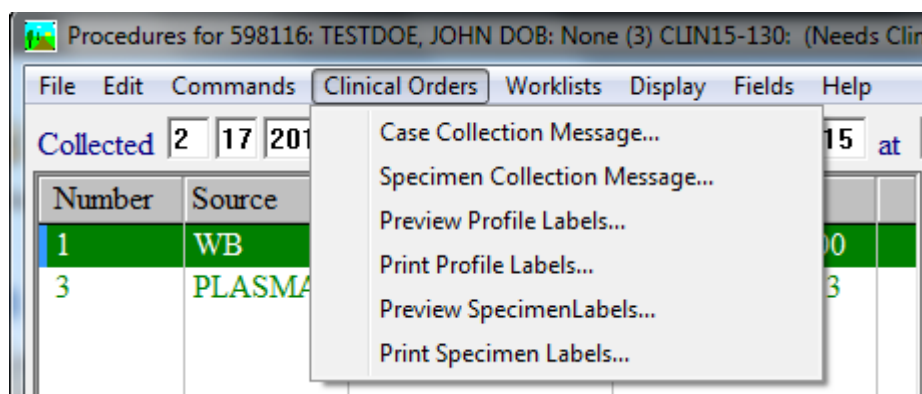
Figure 20 – **Clinical Order Menu**

Adding Profiles to Clinical Cases

To **Order a Profile/Panel**, you may either**:**

- Use your mouse to single click on a Profile/Panel.

- Type one or more characters for the start of either the code or the description in the field labeled **Enter Code or Description**. This will narrow down the profile list for easier selection. Single click on the Profile/Panel.

Once a Profile/Panel is ordered:

- The Profiles ordered will display in the Profiles List Box.

- The Procedures/tests that are associated with the Profiles ordered are populated in the Procedures List Box.

- The Vials associated with the Profiles ordered are populated in the Vials List Box.

- The Sources associated with the Profiles ordered are populated in the Specimens List Box.

Above the Profiles List Box, there are three unlabeled drop down fields: **Priority, Performing Location** and **Bill Type** (Figure 21). Items for these drop downs are either defaulted in from the Profiles Library (**More button**) or entered on a case-by-case basis in this window.

In order to populate these drop down menus, these entries must first be built in the Phrases Library in the boxes of the same names. To select an entry, highlight a Profile in the Profile List Box. Click the drop down menu and select the desired entry.

- The first box is for Priority. Examples would be Routine and STAT. If a Profile is marked as STAT, all Procedures belonging to that Profile will display orange in this window; the case will display orange in the Case List Window; and the Procedures will display orange in the Procedure List Window. There is also a drop down menu in the Procedure List Window to filter by Priority.

- The second box is for Performing Location. This allows you to select the location where the Procedures are being performed. Examples would be In House, Reference Lab, Clinic, Hospital, etc.

- The third box is for Bill Type. Examples would be Self-Pay, Medicare, Private Insurance, etc.

Figure 21 – **Clinical Procedure Order Window**

If a Test is ordered accidentally, highlight the Profile in the Profiles List Box and click the **Cancel button**. A pop-up appears to confirm the deletion. Click **Yes** to delete the Profile. You are then prompted to enter a reason for the cancellation. Click **Done**.

If a Vial is empty or not received, highlight the Vial in the Vials List Box and click the **Not Rec'd button**. You are prompted to enter a reason. Click **Done**. All of the Specimens, Profiles and Procedures associated with that Vial are deleted from the case.

Printing Labels for Clinical Cases

After ordering the desired profiles, click **Labels**. A drop-down menu of all Specimen Label templates is displayed.

Select the desired label template and click **Done**. The standard print window will open. Verify the selected printer and click **OK**. Labels for all Vials on the Case will print to the selected printer.

Label content is defined in the Specimen Label Report in the **Formatter**. Refer to *Chapter 13 – The Formatter* for more information.

After printing labels, the **Clinical Procedure Order Window** closes automatically saving all changes.

Resulting Clinical Cases Manually

Refer to the section titled **Procedure Result Window** in *Chapter 5 – Case Procedures and Profiles,* for information on the Procedure Results Window.

From the Dispatcher Window, open the Case List window. Highlight one or more cases. You may also filter the window by either Needs Procedures or Needs Clinical Results. Once you have the case(s) highlighted, click on the **Procedures button**. This will open the Procedure List window.

Procedure Result Window

Double click on the procedure at the top of the window. This will open the Procedure Result Window allowing you to enter manual results for this procedure (Figure 22).

Figure 22 – **Procedure Result Window**

- **Result Box** – the result of the procedure is entered here.

- **Flag Box** – if the result is outside the Normal Range as entered in the Range of the Clinical Test Code Library, WindoPath will populate the Flag Box with an H or L (for High or Low). If the result is in the Critical range, WindoPath will populate the Flag Box with a CH or CL (for Critical High or Critical Low).

- **Range Box** – displays the High and Low range. The Critical High and Critical Low range is displayed in parentheses. These are what the results are compared to for purposes of populating the Flag Box.

- **Text Result Box** – a text result of the procedure can be entered here. This can be done with free text, as a library pull from the Diagnosis Library or from a result interface. This information will display on the report under the procedure name.

- **Result Text Box (read only) –** if information was populated in the Text for Result Report in the Procedures Library, it will appear in this box. This information will display on the report under the procedure name. (This is consider **Always Text**.)

- **Report Info Box** – when a result flags as Critical High or Critical Low, WindoPath will not allow you to advance the procedure to its final step until information is entered into this box. This is to keep users from inadvertently advancing critical results until such time as they have notified the appropriate parties. Entries can be entered by using free text or by being pulled from the Phrases Library, Procedure Call Information Box. This information will appear under the results on the case report.

Once the result is entered, hit the Enter key. A pop-up window appears asking if you want to advance the status of the procedure. Hit the enter key again. This saves the result in the database, advances the status and moves to the Procedure Result Window of the next procedure.

Continue entering results. When you reach the last procedure in the list, if you hit the Enter key, nothing happens. This is because there are no other procedures to go to in the window. Instead, you will have to click the **Done button** for the last procedure.

All results are now entered. You are back in the Procedure List window. You must now advance the procedure statuses in order to finalize the results. The procedures can be advanced in two ways:

- Highlight the procedures that you want to advance, in the box labeled **Selected Procedures** click on the button with the greater than symbols. This advances the statuses of only those procedures highlighted.

- You can use the box labeled **Listed Procedures**. If you use the button with the greater symbols, this will advance ALL procedures listed in the window without having to highlight them. Using the buttons with the less than symbols, will revert the statuses.

Once all results are entered and procedures have been advanced to their last step, the case will change from Needs Clinical Results to Needs Final Report.

Differential Count Window

From the Dispatcher Window, open the Case List window. Highlight one or more cases. You may also filter the window by either Needs Procedures or Needs Clinical Results. Once you have the case(s) highlighted, click on the **Procedures button**. This will open the Procedure List window.

Highlight one of the procedures associated with the CBC, click the Profile Menu and select Count Diff. The Differential Count Window opens (Figure 23). If Count Diff is dithered, you are not on a procedure that has an association with a Manual Differential Count Profile.

Using your keyboard setup, begin counting your manual differential. (Refer to the section titled **Defining a User Diff Count Keyboard** earlier in this Chapter.) If you need to begin the count over, click the **Clear button** to the left of the cell number wheel. This will set the Count Column back to zero (0).

Now you may result any of the items in the Morphology column. Resulting is done by either using the drop downs or entering free text in any of the fields. To use the drop downs, click in the Result field, click on the downward facing arrow and make your selection.

When all results have been applied, click on the **Save button**. Once back in the **Procedure List Window**, advance the remaining results to Complete.

Differential Count Window Fields

- **Blank Field** (above Diff Count List Window) – click in this box prior to starting your Diff Count. This is where the focus of your mouse must be when you start pressing your shortcut keys to count the various Procedures in your Diff Count Profile.

- **Count** (below Diff Count List Window) – this field keeps the total count while you are pressing your shortcut keys. Once it reaches 100, it will stop. If you would like to continue counting past 100, click the **Continue Count button**. This will unlock the count and allow you to continue.

Differential Count Window List Boxes

This window contains three List Windows.

- **Procedure List Window** (left) – lists the procedures in the CBC Profile along with their results. These results were entered into the Procedure Result Window or released using the Clinical Result Review Window.

- **Diff Count List Window** (middle) – lists the procedures in the Manual Differential Count Profile.

- **Morphology List Window** (right) – lists the procedures in the Morphology Profile.
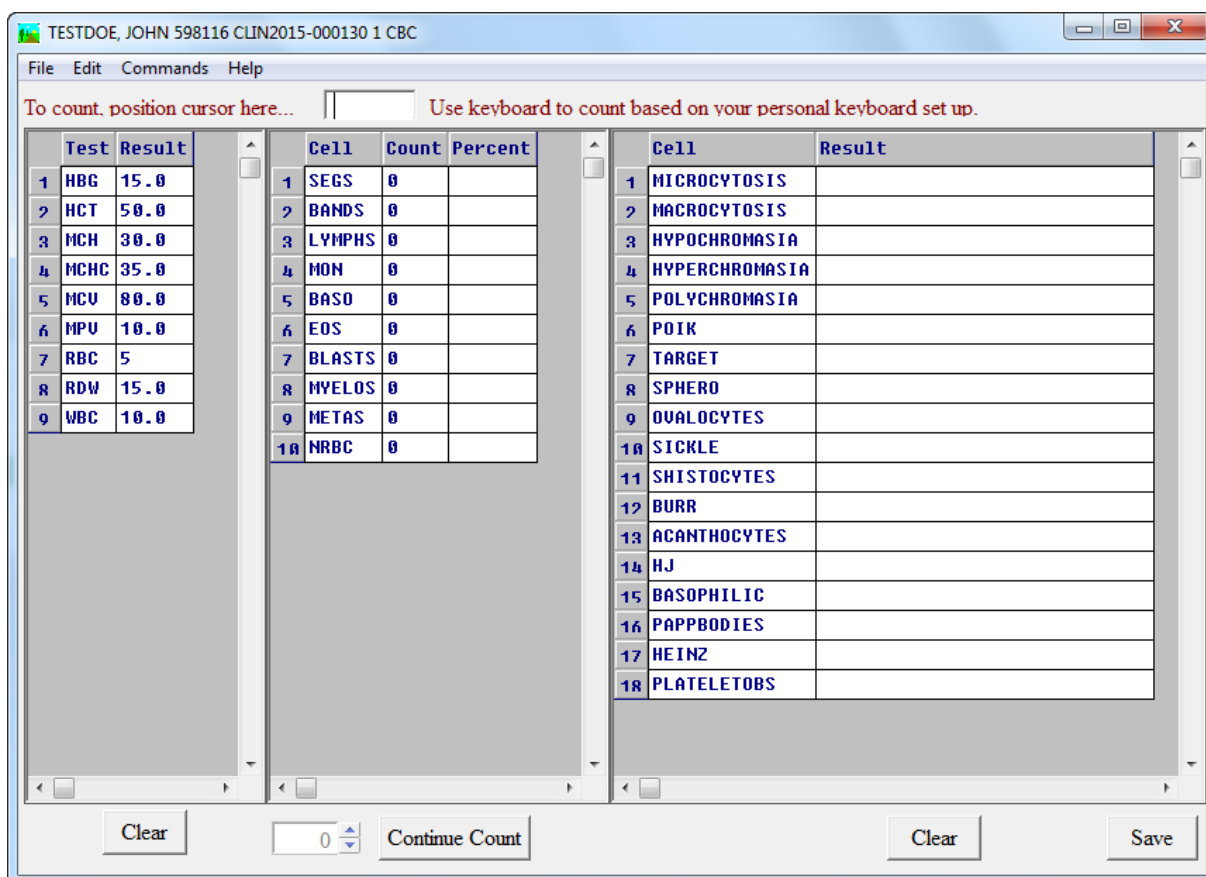
Figure 23 – **Differential Count Window**

Differential Count Window Action Buttons

- **Clear –** clears the entries in the **Diff Count List Window**.

- **Continue Count –** allows the user to continue counting past 100.

- **Clear –** clears the entries in the **Morphology List Window**.

- **Save –** saves the changes and closes the **Differential Count Window**.

Clinical Results Review Window

Please note that this window can only be used with a Direct Results Interface from Clinical Instruments.

Select *Review Clinical Results* from the **Dispatcher Window** – *Dispatcher Menu* to open the **Results Review Window** (Figure 24).
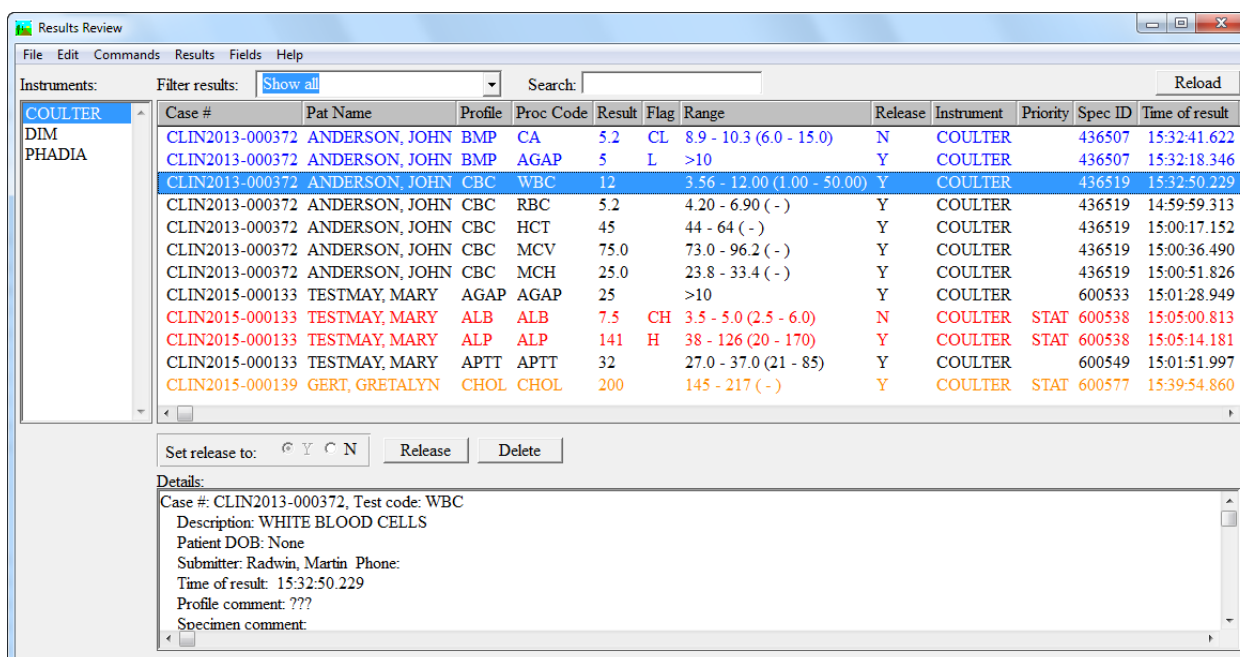
Figure 24 – **Clinical Result Review Window**

The User may use this window to view patient clinical test results sent to WindoPath via an Instrument Interface. Normal results which do not require review, may be released from this window quickly by the User. Critical results (CH or CL), however, must be **Manually Released**. This ensures that the results are documented and reported by the User.

Details for each clinical result are displayed in the **Clinical Results List Box** and in the **Details Field.**

Normal results will display in black. Abnormal results marked as H (High) or CH (Critical High) in the **Flag Column**, will display in Red. Abnormal results marked as L (Low) or CL (Critical Low) in the **Flag Column**, will display in Blue. Any Procedures which have been marked with a Priority of STAT, will display in Orange. Please note that the Red font of H and CH overrides the Orange font of STAT.

Clinical Results Review Window Fields

- **Filter Results –** drop-down menu displays options which allow the User to select results by categories. These categories are as follows:

    - Show All – displays all results for the selected instrument.

    - Ready for Release – displays all results for the selected instrument where the Release column is set to Y.

    - Critical – displays all results for the selected instrument where the Flag column is set to CL or CH.

    - Non-Critical Abnormal – displays all results for the selected instrument where the Flag column is set to L or H.

    - All Abnormal – displays all results for the selected instrument where the Flag column is set to L, CL, H or CH.

- Cannot Release Data Invalid – displays all results for the selected instrument where there is missing or bad data. Example: missing name, case number, etc. The Release column is be marked as n/a.

- **Search –** allows the User to search for any text in the Case #, Pat Name, Profile or Proc Code columns. It is not necessary to right-click on a column in this window in order to search on that column. It does not allow the User to search in the following columns: Result, Flag, Range, Release, Instrument, Priority, Spec ID, Time of result, Detected, Consistent or Adj Creat Value. (Detected, Consistent and Adj Creat Value are for Toxicology only.)

Clinical Results Review Window List Boxes

- **Instrument List Box –** displays a list of all Clinical Instruments issuing patient clinical test results to WindoPath. To view clinical results for a particular instrument, click the desired instrument in the **Instruments List Box.** The **Clinical Results List Box** will populate with the clinical test results issued from the selected instrument.

- **Clinical Results List Box –** displays a list of patient clinical test results in table format for the selected instrument. Columns included in this table are: Case Number, Patient Name, Profile, Procedure Code, Result, Flag, Range, Release, Instrument, Priority, Specimen ID and Time of Result. (Detected, Consistent and Adj Creat Value are for Toxicology only.)

- **Details Text Box –** displays all of the details for the currently highlighted result in the **Clinical Results List Box.** This includes: Case Number, Test Code, Test Description, Patient DOB, Submitter, Time of Result, Profile Comment and Specimen Comment.

Clinical Results Review Window Action Buttons

- **Reload –** reloads all results from the database. If new results have come in since you opened the window, this action will load them. Which results show when this is done, will depend upon the selected instrument and the selected Filter.

- **Release** – allows the User to release the selected results.

- **Delete –** allows the User to delete the selected results.

Clinical Results Review Window Radio Buttons

- **Set Release To –** allows the User to set the Release column to Y for the selected results.

Releasing Normal Results

Normal Results and those marked as **L** or **H** in the **Flag** column are ready for release. The **Release Column** will automatically flag as **Y** and the **Set to Release Radio button** will have the **Y** checked.

If a User wishes to prevent the normal results from being released, they may click the **N Set to Release radio button.**

If you want to quickly release all normal results, it can be helpful to set the **Filter Results** to **Ready for Release**. This will allow you to select all entries in the window and release them with the click of one button.

To release the results, select the desired entries and click the **Release Action button**. The results are released into WindoPath and populate the appropriate procedures. The status of each procedure is advanced to its final step. If all the results on a case are released into WindoPath through the **Clinical Results Review Window**, the case will advance to Needs Final Report. The released test results will no longer appear in the **Clinical Results List Box.**

The **Delete button** is used if the procedure has been repeated and you have two rows of results. Only one will be reported. For the result that you will not use, highlight the row and click the **Delete button**.

Releasing Critical Results

Critical Results (**CL** and **CH**) are released using a slightly different workflow. They are automatically toggled with an **N** in the **Release** column and the **Set to Release radio button** has the **N** checked.

Filter the window to CRITICAL or highlight the cases marked **CL** and **CH** in the **Flag** column. The **Release button** is dithered until **Y** is selected in the **Set to Release Radio button**.

Once the desired cases area selected, click **Y** in the **Set to Release radio button** and then click the **Release button**. A **Comment** box will display. Before you can release a critical result, you are required to enter text in the **Comment** box (Figure 25). The text can be entered free text or by pulling in canned text from the Phrases Library - Procedure Call Information box name.

Once the comment is entered, click on the **Done button**. The results are now released to WindoPath and the status of the procedure is advanced to the last step.
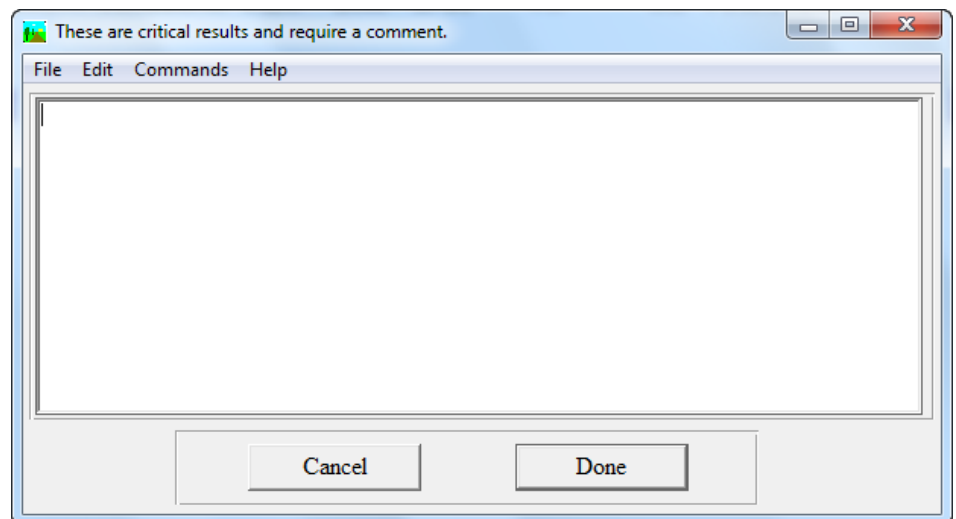
Figure 25 – **Comment Box for Critical Results**

Correcting a Clinical Result

Open the Case List Window, highlight the case and click on the **Procedure button** to open the **Procedure List Window.**

The User must first make sure the status of the Procedure is not at its last step (Complete or Finished). If it is, the status of the Procedure will need to be backed up by at least one step in order to enter a new result. Highlight the Procedure that is to be corrected and click the double **left arrows** (<<) **button** in the **Selected Procedures** area. This is located in the top, right corner of the window.

Double click on the highlighted procedure to open the **Procedure Result Window.** In the Result box, free text the change of the results.

Once the change is made, a **Reason for Modification** box appears. Enter a reason and click **Done**.

If the report section labeled **Corrected Result** is placed into the report format, then the reason entered, the corrected results, the user's initials and date/time stamp will display on the report.

Correcting a Clinical Case Report

Highlight the Case you wish to correct from the Case List Window. Select the **Open button**. This will open the Quick Case Window. Click the Modify menu and select the Correct Case option. This will create a new version of the case. The new version will have a .1 extension on the case number. Each correction that is added to a case, increments the case number extension by one.

The Quick Case Window opens to the Reason tab and prompts you for the reason you have corrected the case. This can be entered by typing directly into the Reason tab or using **CTRL+L** to pull from the Paragraphs Library. Your corrected case (.1) will be at Needs Final Report. Make the necessary modifications that prompted you to correct this case.

Follow your normal workflow for completing cases. The original case is always available through the Archives. The case will appear just as it did prior to the correction. The reason you entered can appear in your printed report if you include the Reason Section in your Report Format.

Formatting Clinical Reports

Refer to *Chapter 13 – The Formatter* for information on creating report formats for Clinical cases.

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