

Retrieving Held Orders

When an order is placed on hold, the order is kept in a hold list until it is filed or deleted, or until it is purged from the system automatically.

Note: For more information, refer to the online help.

Retrieve a Held Order via Order Entry

- In the menu bar, click *Order Entry*.
If the *Order Entry* page appears, go to step 2. If the *Check-In Queue* page appears, click *Call Next Patient* and then go to step 3.

Note: The *Check-In Queue* page appears only if your current facility supports this feature.

- Do the following to retrieve the patient record:


PATIENT INFORMATION




Search By




DOB

[Add New Patient](#)

- In the *Patient Information* area, in the *Search By* list, click *Name*.
 - In the adjacent box, type the patient's complete last name (or as many characters as the application allows).
 - In the *DOB* box, type the patient's date of birth (*mm/dd/yyyy*).
 - Click *Search*.
- In the *Patient Search - Advanced Results* dialog box, review the displayed demographics.

When you have identified the correct patient record, click  next to the patient name to display the pending orders.

PATIENT SEARCH - ADVANCED RESULTS				
Health ID	Patient	City/ State	Zip Code	
	Testcase, One			
				
Req #	Lab Ref ID	Client	Physician	Draw On or After
Original		QLTEST CCLI...	Doe,John (D12345)	
Original		QLTEST CCLI...	Doe,John (D12345)	

- To identify the correct order, review the displayed information.
You can position the pointer over  or  to see the order codes and test names. You can also press Ctrl+f to use your browser's mechanism to search for any displayed text.
If any information is too long to display in its entirety, an ellipsis (...) appears. You can position the pointer over the displayed information to view the complete information.
- When you have identified the correct order, click  in the *Action* column.
- Make any appropriate changes to the order.
- Do one of the following:
 - To file the order and print the requisition and labels, click *File*.
 - To save your changes and keep the order on the hold list, click *Hold*.
 - To discard your changes and keep the order on the hold list, click *Cancel*.
 - To file some order codes now and keep others on hold, click *Split Order*, select the codes that you want to remain on hold, choose a comment, and click *OK*. Then click *File*.
- If you collected a specimen for a patient from the *Check-In Queue*, click *Done* for the appropriate patient.

Retrieve a Held Order via the Hold List


- If necessary, change the lab by clicking the appropriate one in the *Lab* list at the top of the page.
- In the menu bar, click *Requisitions* > *Hold List*.

Name Client Date

Hold List Results

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Client	Requisition	Physician	Date/Time	Patient	Actions
97502840 TEST CLIENT (HQ) PHL	1017954	UPIN: A22301 NPI: 1003625886 BillType: C	10/19/2016 11:55AM	PID: 12345678910 DOB: 01/03/1957 Sex: M	Edit Delete
97502840 TEST CLIENT (HQ) PHL	1017956	NPI: 1205935137 BillType: C	10/19/2016 11:57AM	PID: 12345668 DOB: 01/03/1957 Sex: M	Edit Delete

- Click *Name*, *SSN*, or *PID* and then type the appropriate patient information. (To search by name, include the date of birth.)
For the name, you can use any of the following formats: *LastName DOB* (such as Doe 9/21/1958), *LastName, FirstName DOB* (such as Doe, John 9/21/1958), or *FirstName LastName DOB* (such as John Doe 9/21/1958).
- To limit the search further, click *Client*, *Number*, or *Phone* and begin typing the client's name, number, or telephone number (area code first). A list appears with the first ten matching items. As you continue typing, this list displays more similar matches. When you see the appropriate client in the list, click that one.
You can also specify the date range during which the order was put on hold.
- Click *Search*.
The bottom of the page displays up to 250 held orders that match the specified criteria.
- Do one or more of the following:
 - Sort the hold list.** Click the appropriate column heading to sort the hold list by client number, requisition number, physician name, the date and time that the order was placed, or the patient's last name.
 - Find specific text.** Press Ctrl+f. This activates your browser's built-in search mechanism. Use the appropriate procedure for your browser to locate the desired text.
 - View the errors in the order.** If the requisition number appears in red, the order contains at least one error. To view the errors, position the pointer over the requisition number. The list of errors appears in a pop-up window.
 - View the list of ordered tests.** Position the pointer over .
The list of associated order codes and test names appears in a pop-up window. (If any of the order codes are invalid or require clarification, an appropriate message appears instead of the test name.)
- When you have identified the appropriate order, click *Edit* in the *Actions* column.
- Make any appropriate changes to the order.
- Do one of the following:
 - To file the order and print the requisition and labels, click *File*.
 - To save your changes and keep the order on the hold list, click *Hold*.
 - To discard your changes and keep the order on the hold list, click *Cancel*.
 - To file some order codes now and keep others on hold, click *Split Order*, select the codes that you want to remain on hold, choose a comment, and click *OK*. Then click *File*.

For help, contact the Help Desk at 1.800.697.9302

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