Direct Transmission of PT Results

User Guide, Part 2 of 3

Meditech Client Server Reports Installation

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INTRODUCTION

What are the PT Extract and Test Compendium Reports?

PT Extract Report

The PT extract report is report query that has been developed to aggregate the collection of PT data elements from the LIS, format them to CAP-specific guidelines, and place the output (PT results file) in your laboratory's designated pickup folder, where it can be picked up and transferred to the direct transmission CAP PT hub. The report is intended to be integrated within the LIS making it accessible like other reports in your LIS.

Test Compendium Report

For some LISs, a second report query is available that can aggregate the complete list of tests that your laboratory performs, including your laboratory's test codes, description, unit of measure (UOM), and specimen type. This report, called a test compendium report, will be saved to a temporary location on your computer.

This list of tests may be useful for the mapping process that needs to be completed within the hub. During the process:

You will need to map your laboratory's…	To the…
LIS Test Description	CAP Test Description
LIS Test Code	CAP Test Code
LIS Test Unit of Measure	CAP Test Unit of Measure
LIS Test Specimen Type	CAP Test Specimen Type

There are several methods available to complete the mapping process. With some of the methods, your laboratory may find it helpful to utilize part or all of your laboratory's test compendium, since the hub allows you to upload/import to simplify the test mapping process. Only quantitative tests and direct transmission enabled programs need to be mapped.

Report Setup in Meditech Client Server: An Overview

In Meditech Client Server, the LIS laboratory administrator is responsible for setting up the PT extract and test compendium reports. Below is a high-level overview of the setup process.

Note: The CAP can provide support throughout the setup process. Work with your laboratory's point of contact to coordinate any support with the CAP.

PT Extract Report

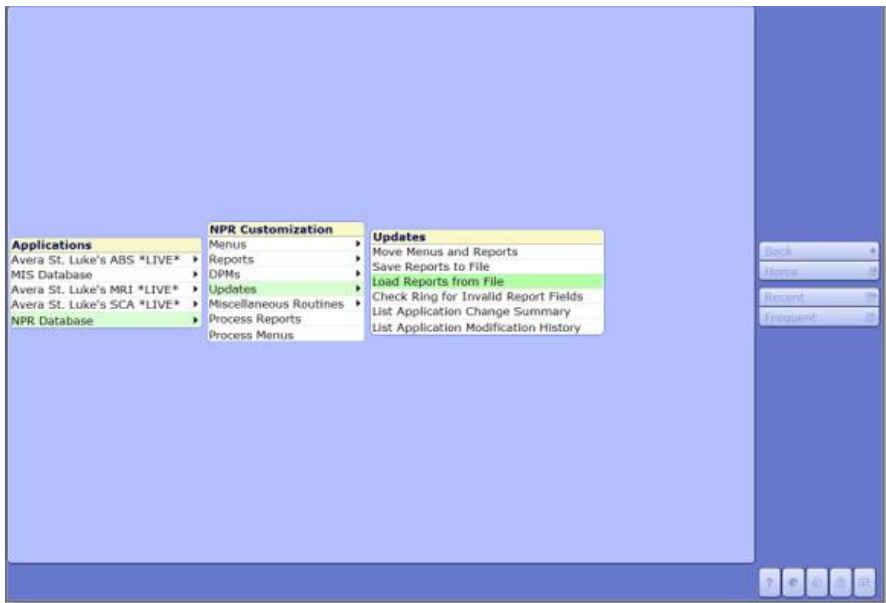| **1**	Install the extract report and modify the query (as needed) to point to the appropriate network folder location (agent pickup location).
2	Make the report accessible to the end user by modifying security and adding the report to the LIS report menu.
3	Perform testing to ensure a file is extracted to the appropriate network folder location (agent pickup location).

Test Compendium Report

1	Install the test compendium report..
2	Make the report accessible to the end user by modifying security and adding the report to the LIS report menu.

SETTING UP THE PT EXTRACT REPORT

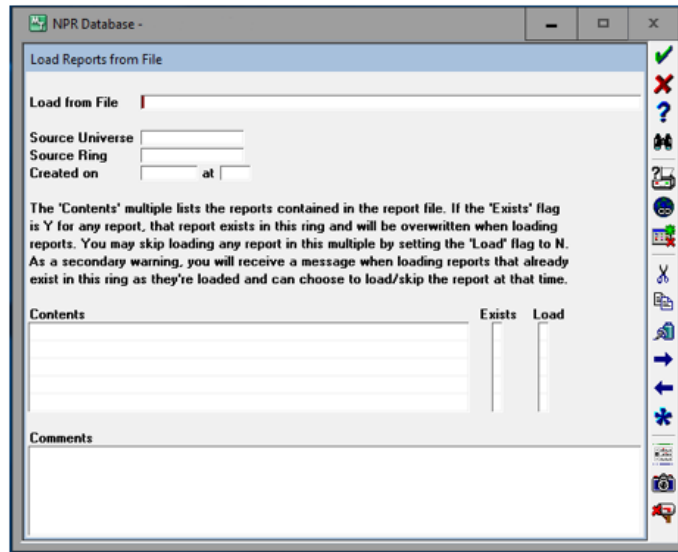## Installing the PT Extract Report

The CAP customer support team will provide you with the "LAB.L.SPEC.cap.Proficiency.npr" report document via email that you must import into Meditech and add to your menu. The instructions below assume you have been given the extract report.

Step	Instructions
1	To upload the report into your LIVE ring, go to the Updates menu within the Customer NPR Report writer module, and execute the Load Reports from file routine.

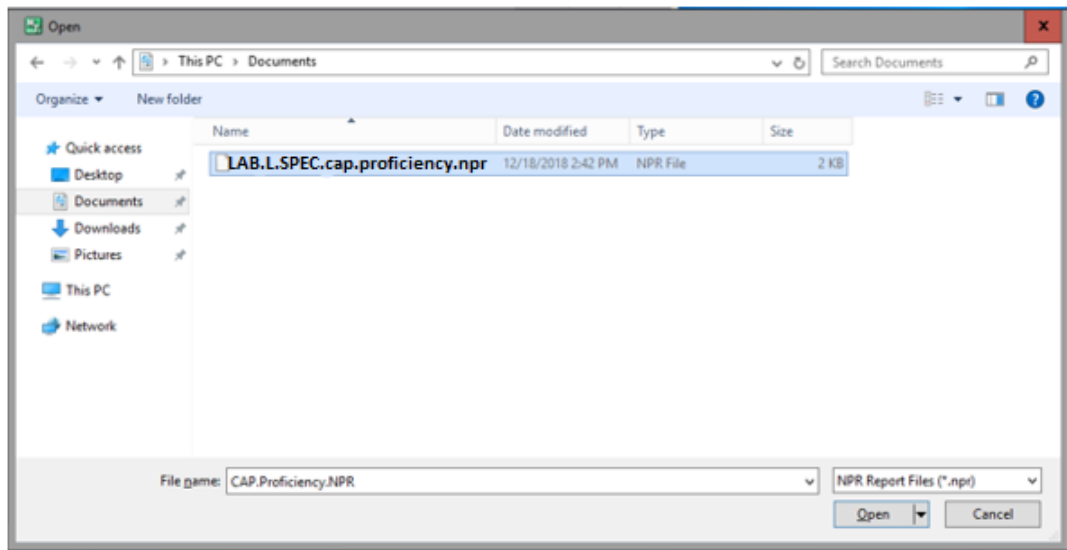| Step	Instructions

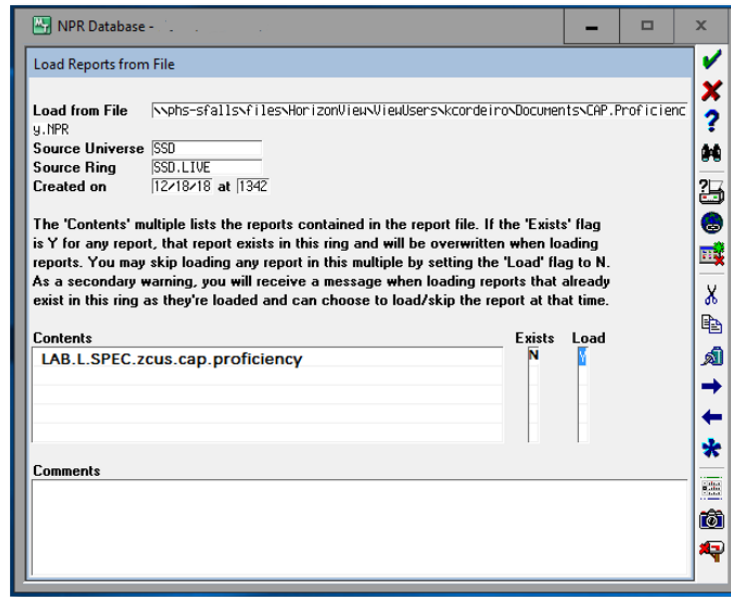| 2 | From within this routine, locate the file, "LAB.L.SPEC.cap.Proficiency.npr," by pressing the **F11** function key or clicking the binoculars icon. |

| 3 | Browse your directory to the location of where the extract report was saved. Select the extract report and then click **Open**. |

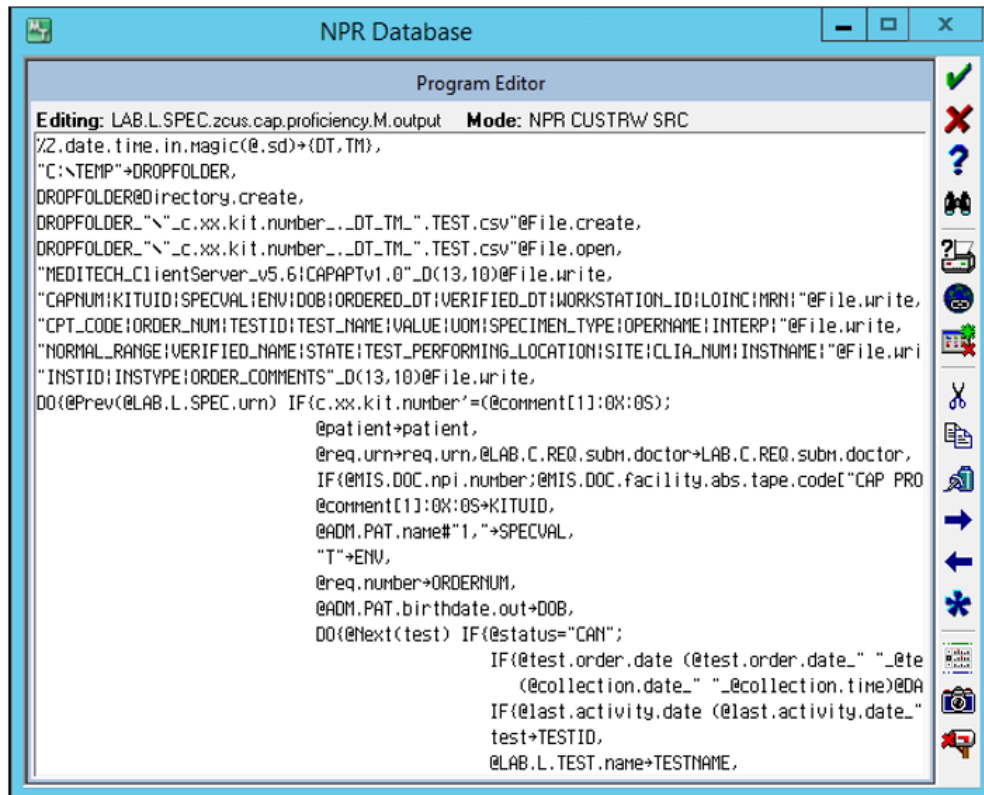| Step	Instructions
4	Press **F12** to File.

Changing the File Save Path

Next, you must change the location of the file. This is hardcoded in the program, so make the changes as applicable to your institution.

If a different drop location is desired, you must manually modify the macro output. To do this, select option 7 **Macro Enter/Edit** from the Process Reports screen.
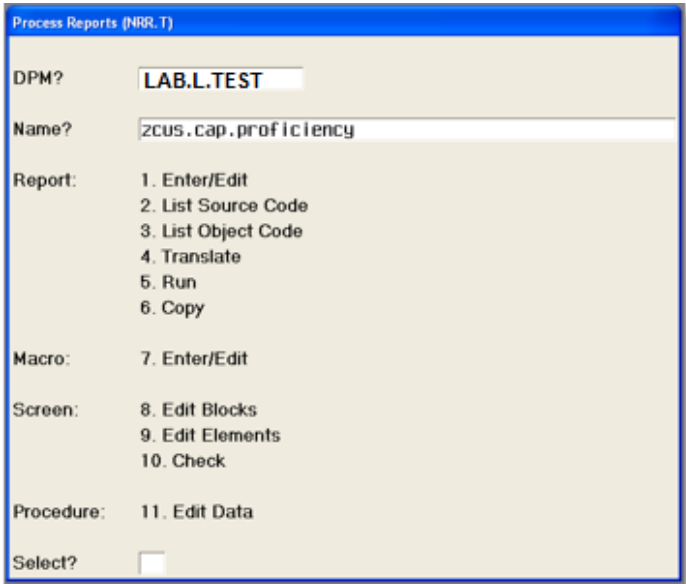

Change the path in line two of the program from "C:\TEMP" to whatever UNC path (provided by your IT/IS resource) that defines the folder for the file to be placed. This will allow you to use a different drop location. Once changed, press **F12** to file and then click **Yes** to translate the macro.

Translating the PT Extract Report

Before you can begin using the PT extract report, you must translate the report.

Step	Instructions
1	Within the Customer NPR Report Writer, select the **Process Reports** routine.
2	In the Process Reports window, enter the appropriate values: • Enter "**LAB.L.TEST**" In the **DPM?** field. • Enter "**zcus.cap.proficiency**" in the **Name?** field. • Enter "**4**" in the **Select** field (the report code for Translate is "4").

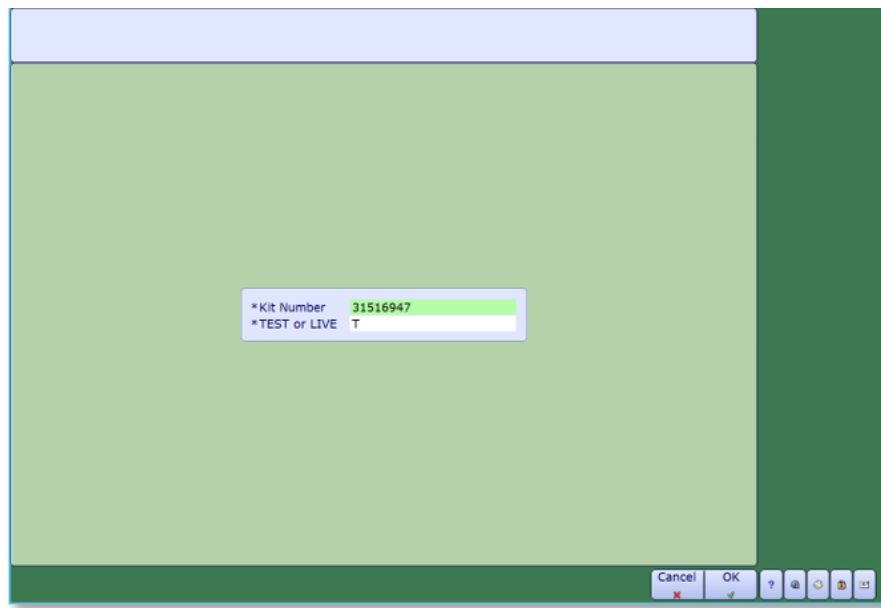| Step	Instructions
3	Click **OK**.
4	Once translated, the report can now be run, either by placing it on a menu or by selecting **5. Run** from the Process Reports routine above.

Adding the PT Extract Report to the Menu

The next stage in the setup process is to add the report to the menu. The steps may vary based on the version of Meditech so follow your typical steps to add a report to the Meditech menu. If you need assistance with adding a report to the menu, contact your Meditech support team via email, phone, or online.

Testing the PT Extract Report

Step	Instructions
1	To test the PT extract report, you will need assistance from a laboratory technician to enter a valid, previously resulted kit number. The report parameter, "TEST or LIVE," defaults to, "L," so you will need to change it to, "T," if you want to test the report to confirm your mappings. The laboratory technicians will leave the, "L," for their LIVE PT result submissions.

Step	Instructions
2	Press **F12** and print. "Printer" should be set to "Preview."
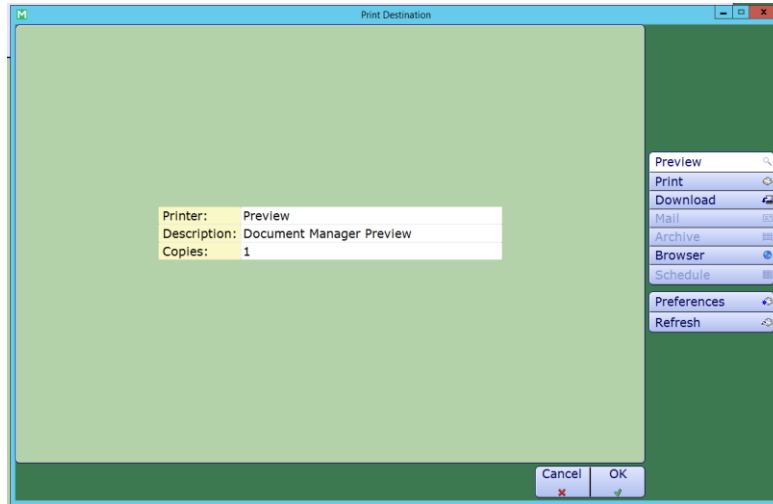
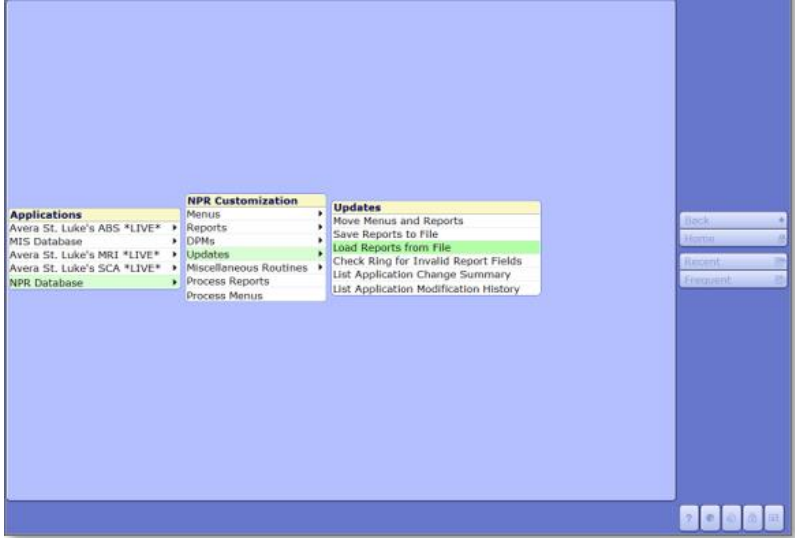| Step	Instructions
3	The PT extract report will generate a .csv file with the output of the data and place it in the designated pickup folder. The file will then be picked up and delivered to the CAP hub for further processing. The report that prints to preview will provide the location and filename that was just created. The message shown below will serve as a confirmation that the print job is complete.
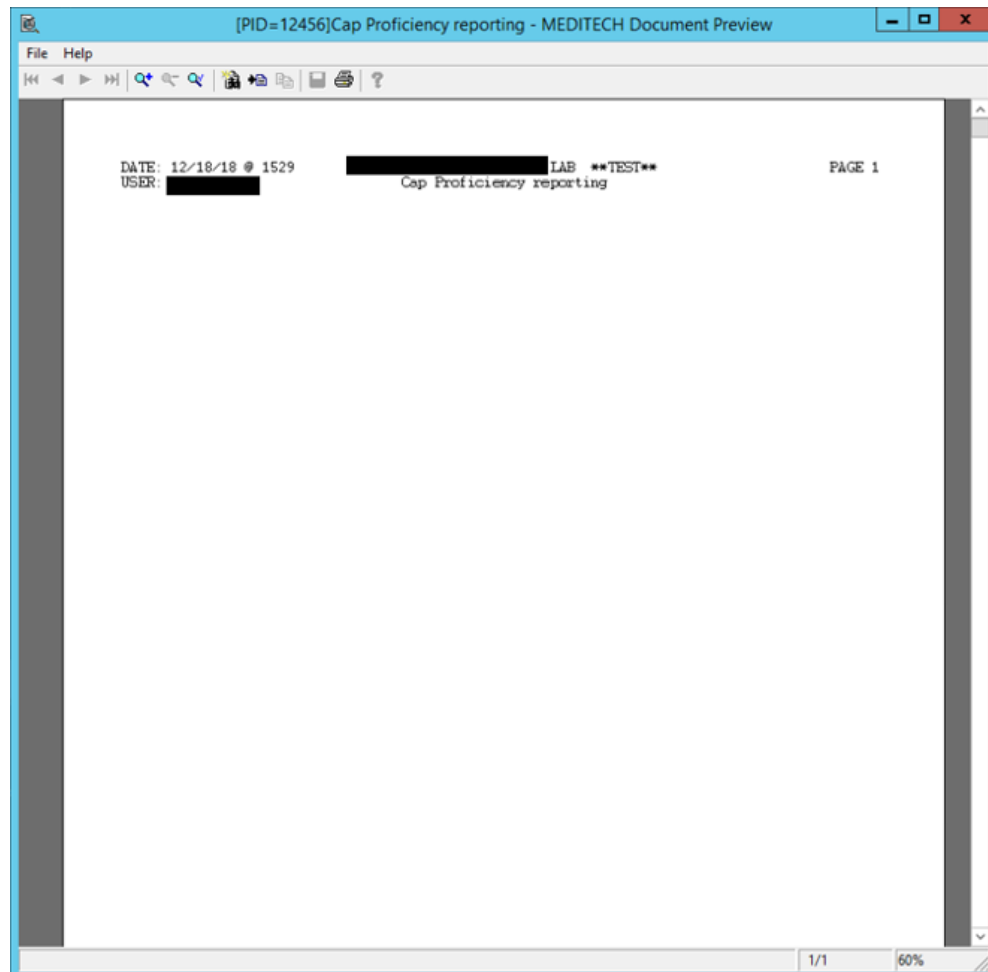
Note: The report is hard coded to go back and look for PT results 90 days from the order date for that CAP PT kit. If you are using a PT kit older than 90 days to validate your test code mappings, you may get a blank report. To address this, you must either create a new order or use a previously approved kit that has been submitted within the past 90 days.

SETTING UP THE TEST COMPENDIUM REPORT

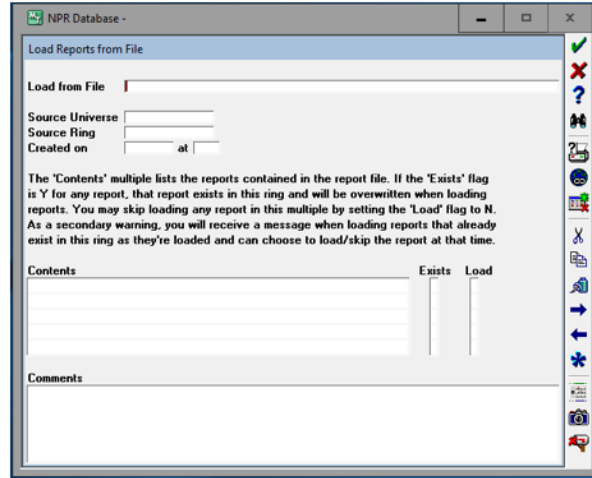## Installing the Test Compendium Report

Like the PT extract report, the CAP customer support team will provide you with the, "Lab.L.TEST.CAP.List.npr," ".NPR" report document via email that you must import into Meditech and add to your menu. The instructions below assume you have been given the extract report.

Step	Instructions
1	To upload the test code compendium report into your LIVE ring, go to the **Updates** menu within the Customer NPR Report writer module, and execute the Load Reports from file routine.

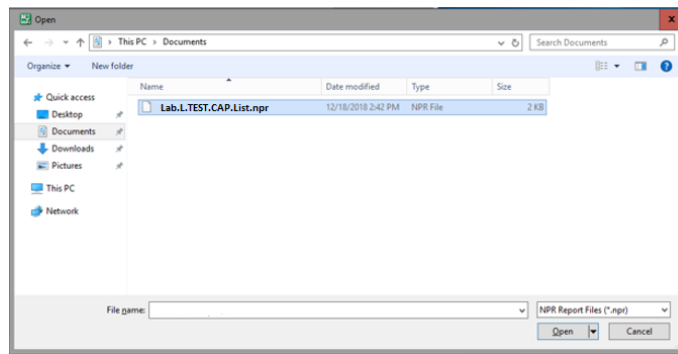| Step	Instructions
2	From within this routine, locate the file, "Lab.L.TEST.CAP.List.npr," by pressing the **F11** function key or clicking the binoculars icon.

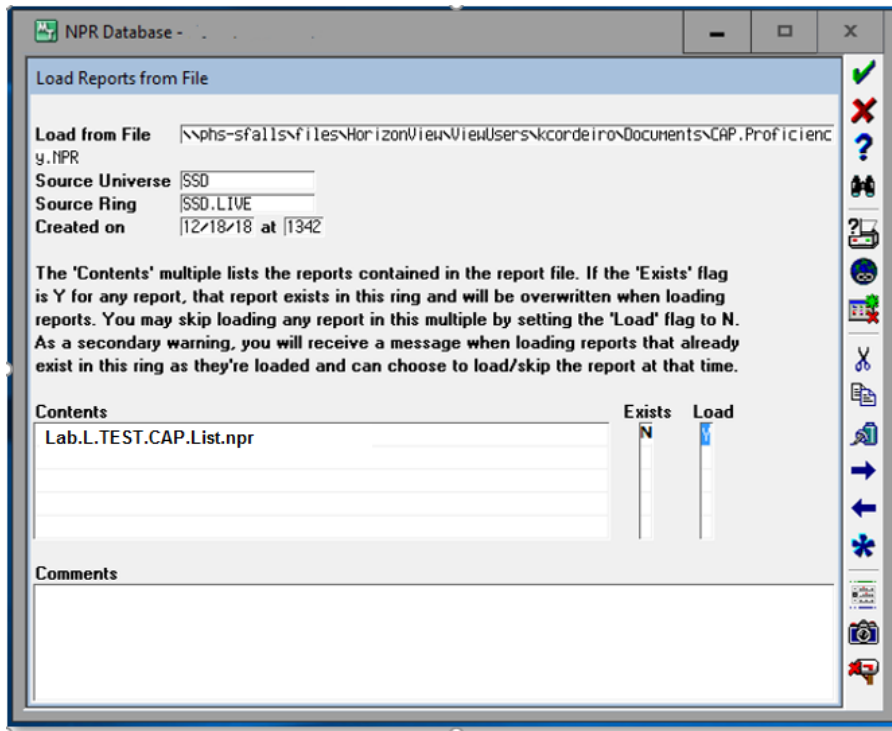| Step	Instructions
3	Browse your directory to the location of where the extract report was saved. Select the extract report and then click **Open**.

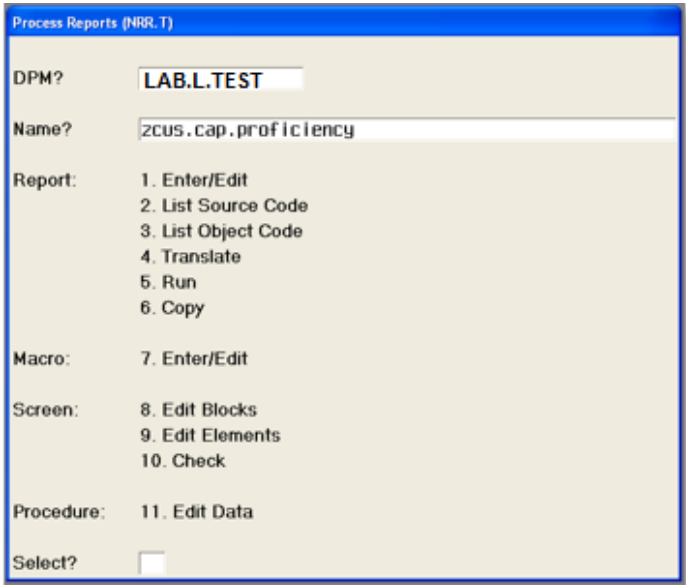| Step	Instructions
4	Press **F12** to File.

Translating the Test Compendium Report

Before you can begin using the test compendium report, you must translate it.

Step	Instructions
1	Within the Customer NPR Report Writer, select the **Process Reports** routine.
2	In the Process Reports window, enter the appropriate values: • Enter "**LAB.L.TEST**" In the **DPM?** field. • Enter "**zcus.cap.proficiency**" in the **Name?** field. • Enter "**4**" in the **Select** field (the report code for Translate is "4").

Step	Instructions
3	Click **OK**.
4	Once translated, the report can now be run, either by placing it on a menu or by selecting **5. Run** from the Process Reports routine above. Once the report is run, it will place the output file on your C:\temp folder.

Adding the Test Compendium Report to the Menu

The next stage in the setup process is to add the report to the menu. The steps may vary based on the version of Meditech so follow your typical steps to add a report to the Meditech menu. If you need assistance with adding a report to the menu, contact your Meditech support team via email, phone, or online.

Running the Test Compendium Report

Once all the setup steps have been completed to install the test code compendium report, you are now ready to run it from your Meditech menu.

TROUBLESHOOTING GUIDE

Troubleshooting Matrix

Note: Your organization's LIS administrator is responsible for troubleshooting problems with report installation and operation.

Problem	Potential Causes/Areas for Investigation
Error message when running the report	• LIS system changes/updates made that may have impacted the report • Invalid information being entered into the report parameters • Infrastructure or network issues • LIS system issues
Report runs but no file is found in the pickup folder	• The appropriate CAP printer was not defined, or no printer selected • Report issues • Security changed not enabling access for the report to write to the pickup location • The file was moved by the agent, verify in the Archive folder or the hub
Report runs extremely slow	• There is a date parameter within the report that allows the query to go back a certain amount of time. This may need to be set to only go back 90 days. • Report issue • Network or infrastructure issue
Cannot find the report to run	• Report was moved due to a change • User does not have the appropriate security to view the report • Verify that you have the right environment and location • Report was removed by a system upgrade or change, or backup restore