tQuest
Primary Care
User Guide

Version Control

Date	Author	Summary of Changes	Doc Version No	Software Version
11th February 2016	Andrew Barnes		Release1	4.1.4

In case of query

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Contents

1 Introduction

tQuest on line test requesting, is seamlessly accessed directly from a GP's Practice Management System (PMS). It provides a quick, effective and flexible requesting solution to meet every clinician's requirements. Access to tQuest is available to practice users who have user accounts configured on the PMS and tQuest.

The options are configured by Trust System Administrators dependent on the local requirements. For the purpose of this manual, all the possible options which are available in tQuest are described.

1.1 Online Help

The **Help** icon is located at the top right side of the screen, using this icon will display an electronic copy of this manual.

NOTE - All screen shots within this document are based on tQuest being configured for England and Wales, therefore some minor differences may be apparent for users outside of those areas. These differences do not affect the functionality or use of tQuest.

tQuest can also support different types of nationally recognised Unique Patient Identifiers, currently these are the NHS Number for England and Wales, and the Community Health Index (CHI) for Scotland, other Unique Patient Identifiers can also be used by tQuest if required.

NOTE - Only one type of Unique Patient Identifier can be used at anyone time. For example ALL patients must use the NHS Number or CHI number.

2 New Request

The screen that is displayed when tQuest is accessed from the Practice Management System (PMS), is specified by the Practice Administrator. If the administrator has not indicated a preference, and the user is configured to make requests, the **Order** tab is displayed first. (See section *2.3.1 Common Orderables*.)

The **Patient** and **Request** tabs will be populated automatically with details passed from the PMS.

The tQuest access screen displays the following tabs:

- Patient (see section *2.1 Patient*)
- Request (see section *2.2 Request*)
- Order (see section *2.3 Order*)

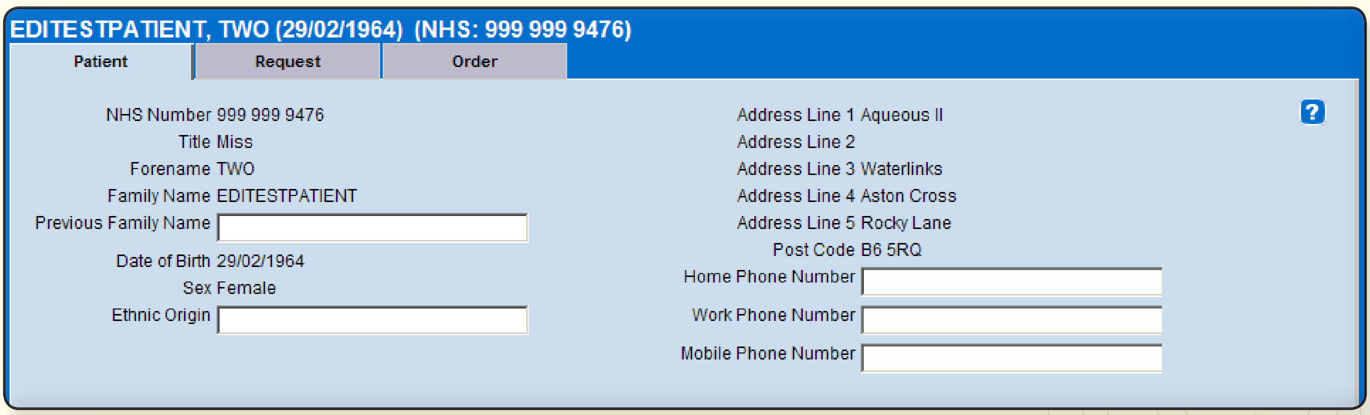
On the top right side of the screen is the **Help** button, this gives access to an electronic version of this manual.

The bottom of the screen has the following buttons:

- **Finish -** Click the **Finish** button when the order is completed, this will generate a request form and/or labels. This is the option to use when the user entering the request details will be collecting the samples immediately, or if the request form will be given to the patient to take to an external location, for the sample to be collected.
- **Save -** Click the **Save** button when a request is created and the sample is to be taken at a later time/date, or by another user at the practice. For example, the request is created by a GP but the sample is collected by the Practice Nurse. A request form and/or labels will not be printed.
- **Cancel -** Click on the **Cancel** button to close the request form without saving it, except users who have accessed tQuest via the PMS TPP SystmOne, who should cancel any requests using the **Cancel** button at the top left side of the screen.

2.1 Patient

Selecting the **Patient** tab will display the following screen.



The **Family Name** and **Date of Birth** are mandatory fields. The remaining fields may be specified as mandatory by a Trust System Administrator.

When tQuest is accessed from the PMS, the patient details will be populated with the patient's demographics, as they are recorded on the PMS. Any fields that are left blank, indicate that the information is not available in the PMS.
In general, requests for patients who do not have a Unique Patient Identifier on their record can still be made, and the results will be received by the requester. Specific Trusts may require that a valid Unique Patient Identifier is required and mandatory for a request, in this situation the request cannot be made electronically.

It should be noted that it will not be possible to **View Previous Results** for any patient who does not have a Unique Patient Identifier. (See section ***2.3.9 Previous Available Results***.)

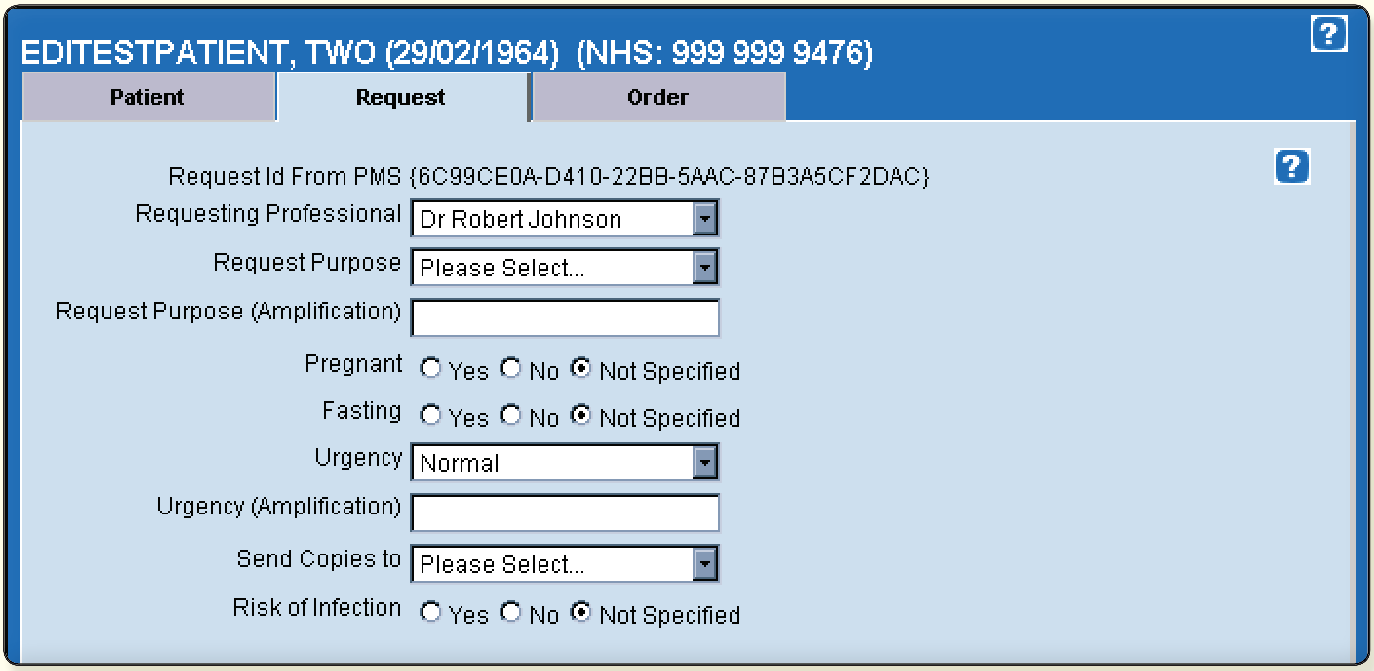
The Category radio button indicates the request type for the patient. It can be changed by the requester if the request is anything other than the default of NHS. The options are NHS, Cat2, Private. Category II status applies to diagnosis and/or treatment, which is not available under the NHS. The work is carried out by medical staff but does not form part of the duties of the practitioner under the terms of his contract.

An example of a Cat2 patient would be somebody who was referred by a medical adviser of the Department of Social Security.

Sexual Health Practices who are using a requesting system other than Blithe Lilie, will have two fields **Patient Identifier** and **Repeat Patient Identifier**. The identifier that the clinic uses should be entered in both fields. This information will replace all patient identifiable data in the electronic request.

2.2 Request

The fields on the **Request** tab are configured by a Trust System Administrator and will vary between Trusts. For the purpose of this document all possible options are described. All fields will be populated by the information held in the PMS. An empty field indicates this information was not recorded in the PMS.



▷ **Request ID from PMS -** When tQuest is accessed from the PMS, a unique identifier will be generated. It is not possible to make any changes to the ID.

▷ **Requesting Professional -** This label is populated with the user's name for practice staff who have permission to request tests in their own right, and are accessing the **Request** screen from their PMS. If the person logged onto the PMS is making the request on behalf of another person, the requester's name should be selected from the drop down list to the right of this field. The drop down list is populated with information that is configured by a Trust System Administrator. It is possible for sites to propose a user to be added to the list of **Requesting Professionals**. (See section *4.4.1 To Add a New User*.) The results for the requested test(s) are communicated to the professional whose name is entered in this field.

▷ **Request Purpose -** The reason for requesting the test can be selected from the drop down list.

▷ **Request Purpose/Amplification -** Allows additional supporting information to be added to the reason for requesting. This is a free text field.

▷ **Pregnant -** Select the relevant radio button. This field displays for female patients in a specified age range. The date ranges are specified by a Trust System Administrator.

▷ **Fasting -** Select the relevant radio button to indicate if the patient is fasting at the time the sample is taken.

▷ **Urgency -** Usually selected from a set of radio buttons. If there are more than a handful of choices, or if a Please Select… option is included as the default urgency, the request's urgency will be selected from a drop-down list. Where pathology and radiology investigations may be requested the urgency on the request form typically relates to only the pathology items.

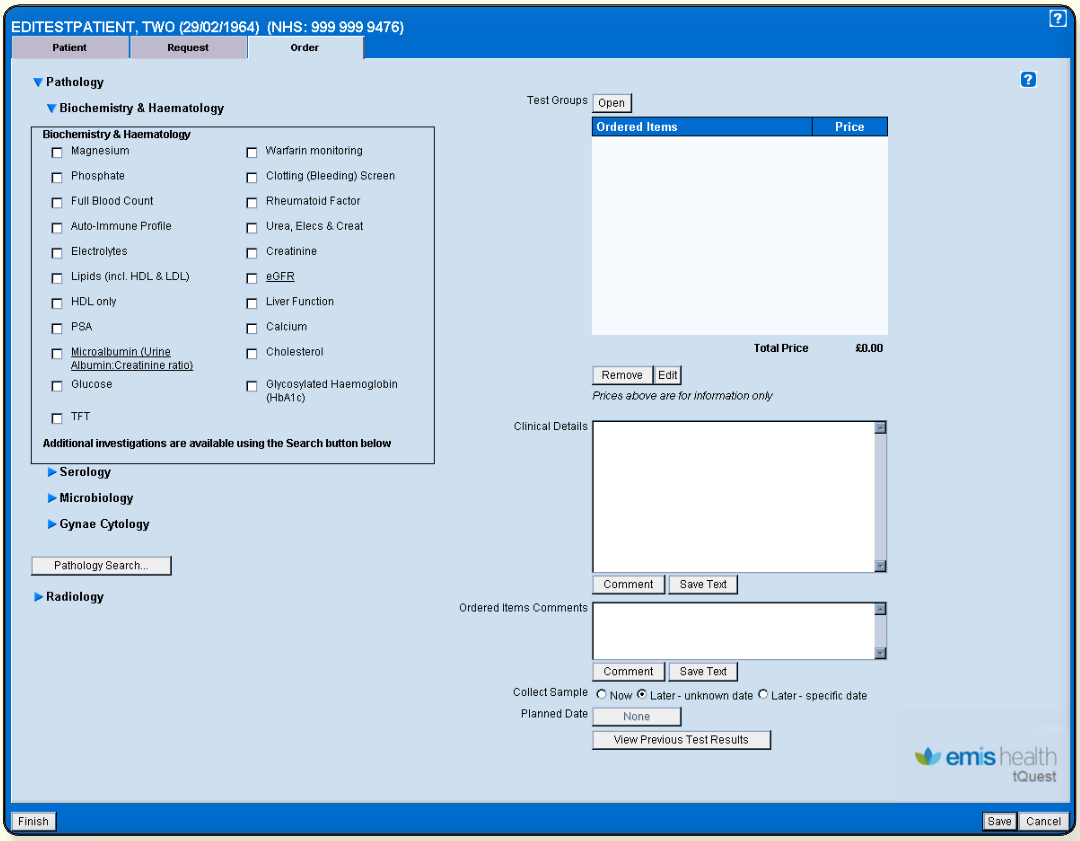
▷ **Urgency (Amplification) -** Allows additional supporting information to be added to the urgency. Only enabled for urgencies values other than the one selected when the request form loaded.

▷ **Send Copies to -** The drop down list allows the selection of a hospital consultant to receive a copy of the test or investigation results.

▷ **Risk of Infection -** Select the radio button to indicate if there is any risk of infection from the sample.

2.3 Order

The **Order** screen is configured by a Trust System Administrator; therefore not all of the sections described may be available. This screen displays all the test services that the Pathology and Radiology departments offer. The options will be relevant to the age and gender of the patient. For example, pregnancy tests (or pregnancy related protocols) will not be available for male patients, or female patients outside of child bearing age ranges. The catalogue of orderables is also relevant to the individual requesters. For example, radiology investigations will be available for GP's or practice staff who hold an appropriate qualification only. A Trust System Administrator specifies the fields that are mandatory.



2.3.1 Common Orderables

A Trust System Administrator will determine and configure the **Common Orderables** area of the **Order** screen. **Common Orderables** are the items that are most frequently requested by GP surgeries. Typically they reflect those that are ordered on paper requests, by completing the check boxes. Common orderables are ordered in the same manner electronically, by ticking check boxes. The screen will display with one or more titles of **Expandable Sections** on the left. The **Expandable Sections** give access to **Common Orderables** that are grouped together, clicking on the arrow to the left of the title will open the **Expandable Section.**

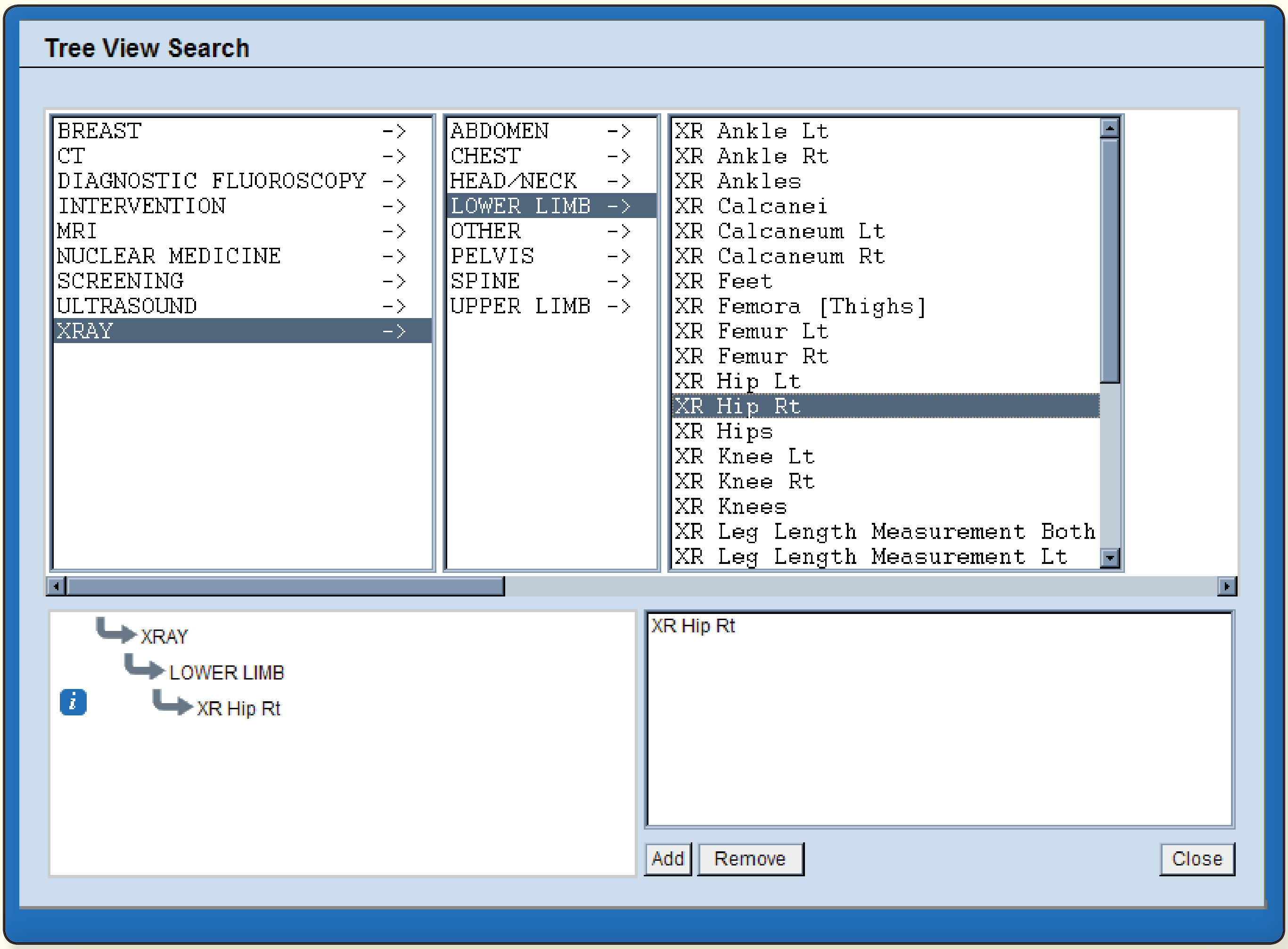
Where only one **Expandable Section** is configured, the screen will display as a single table.

The name of any **Common Orderable** which is underlined indicates that additional information is available. To access the information, single click on the name of the **Common Orderable**.

Ordering multiple instances of a test is possible, (if configured by a Trust System Administrator). Clicking on the orderable will display a number in the check box which increases each time the orderable is selected. The number of requests is also reflected in the **Ordered Items** pane. (See section *2.3.6 Ordered Items*.)

2.3.2 Orderable Tree View

Where a System Administrator has configured **Orderable Tree Views** to be used, a **Search** button will display at the bottom of the relevant **Section**.



When the button is clicked, the **Orderable Tree View** opens to show three panes. The first pane lists (in alphabetical order), the titles of folders that contain either further folders or orderables. The hierarchy is navigated by clicking on the folders until the orderables are reached. Each time a new level is accessed, a further column will open to the right of the current one. An overview of the progress down the hierarchy, is displayed in the pane on the bottom left of the screen.

Orderables with an icon on the left indicates that additional information is available. To access the information, single click on the icon.

Orderables are selected by highlighting the item and clicking on **Add,** or double clicking on the item. The list of ordered items shows in the pane at the bottom right of the screen.

Orderables from different folders may be added in the same request.

Clicking on the **Close** button, will close the **Orderable Tree View** and the **Ordered Items** pane is populated with the information. (See section ***2.3.6 Ordered Items***.)

2.3.3 Test Groups

Orderables that are routinely ordered at the same time, can be configured into **Test Groups** by a Trust System Administrator. The available **Test Groups** are seen by clicking on the **Open** button next to the **Test Groups** heading, on the right. Selecting one of the groups from the resulting menu, will display all the tests within the group in the **Tests in Group** field.

The items in a **Test Group** are ordered by either double clicking on the **Test Group,** or highlighting the **Test Group** and clicking the **Add** button. All the tests from the highlighted group will show in the **Ordered Items** pane. (See section ***2.3.6 Ordered Items***.)

Any item included in a **Test Group**, that is also a **common orderable**, will automatically be ticked in the **common orderables** table, when ordered as part of a **Test Group.** (See section ***2.3.3 Test Groups***.)

Orders for individual items will not be duplicated if a **Test Group** that includes that item, is also ordered as part of the same request.

Any age or gender restrictions applied to individual tests in the **Test Group** will exclude those test from view and the request.

Orderables that have **Protocols** (see section ***2.3.7 Protocols***) attached to them, will ask additional questions when they are added to the request, whether they are ordered individually or as part of a **Test Group**. (See section ***2.3.3 Test Groups***.)

2.3.4 Pathology Orderables

The full catalogue of **Pathology Orderables** is accessed from either the **Pathology Search** button, this is shown below the list of disciplines, or the **Open** button above the **Ordered Items** field. **Note**: only one of these options will be available, dependent on the option the Trust has chosen. The **Pathology Orderables** list opens on the left of the screen in a separate window. It is possible to filter the list of orderables by selecting the discipline from the drop down list. Alternatively, the user can type the name (full or partial) of the test into the **Orderables Search** field, the field is not case sensitive. The system will search through all the available tests and display all results that contain the search text anywhere in the test name. The pane has two buttons below it:

- **Add -** This button can only be used once a test is highlighted, clicking the button will place the test into the

Ordered Items pane. (See section [2.3.6 Ordered Items](#).)

▷ **Info -** If the **Info** button is configured by a Trust System Administrator, additional information about the orderable may be displayed in a web page (for example, guidelines for its suitability). The orderables that have additional information are identified with a light blue background. To see the information, highlight the item by clicking on it once, then click on the **Info** button.

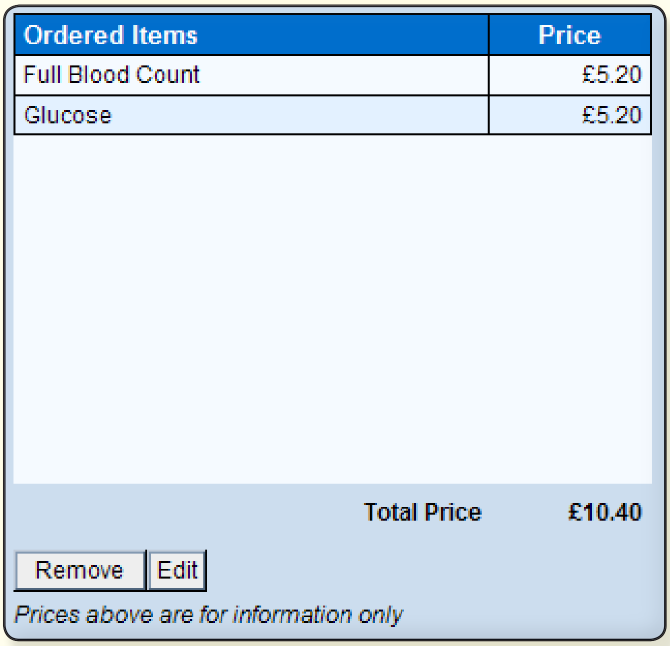
2.3.5 Radiology Orderables

The full catalogue of **Radiology Orderables** is accessed from either the **Radiology Search** button, this is shown below the list of modalities, or the **Open** button above the **Ordered Items** field. **Note**: only one of these options will be available, dependant on the option the Trust has chosen.

This accesses the radiology **Orderable Tree View. (**See section ***2.3.2 Orderable Tree View*** for details of ordering using the **Orderable Tree View**.)

2.3.6 Ordered Items

This pane displays the names of tests and investigations the requester is ordering. If enabled by the System Administrator, the cost for each item will show on the right under the **Price** column. The **Total Price** for the order is calculated at the bottom.



On the bottom left of the pane are two buttons:

▷ **Remove -** To remove any single item from the **Ordered Items** pane, highlight the item and click the **Remove** button, multiple items can be removed by holding the **Ctrl** button and selecting all items that are to be removed. Any item can be removed regardless of whether it was added as part of a **Test Group** or individually.

▷ **Edit -** Allows the responses to any **Protocols** (see section ***2.3.7 Protocols***) to be changed. Highlight the item in the **Ordered Items** pane and select **Edit**, all of the questions previously answered will display. Enter the new information and click on **Save** to confirm the changes.

▷ **History -** This field allows free text to be entered for any relevant patient history that the requester may wish to record, and/or communicate to the lab.

▷ **Current Medication -** Allows entry of any medication the patient is currently taking.

▷ **Clinical Details -** Allows any supporting clinical information to be communicated to the lab.

▷ **Ordered Items Comments -** Allows any supporting or relevant information to be communicated to the laboratory.

▷ **Additional Contact Information -** Allows any relevant contact information to be entered.

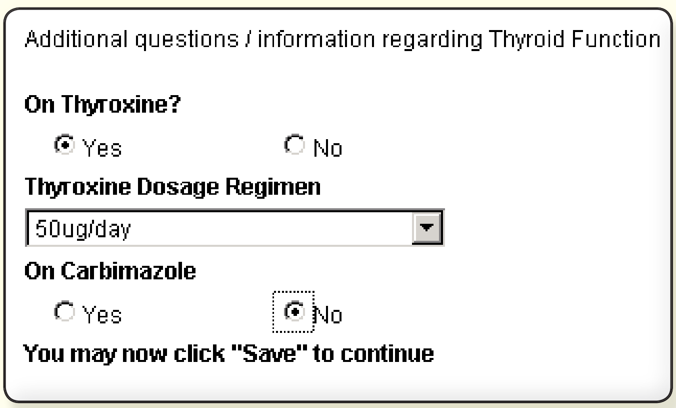
If configured by the System Administrator, two further buttons may be available below the **History**, **Current Medication**, **Clinical Details** and **Additional Contact Information** fields. The buttons allow **Comments** to be added or created for use in these fields.

▷ **Comment-** This button allows the user to add further information to the request, by clicking the button and selecting existing details from a list. The list is either populated by a System Administrator at the Trust or by practice users. Click on the **Comment** button and from the list, select the relevant text and click **OK.** To add multiple comments, hold the **Ctrl** button and select each comment to be added. Alternatively, press **Shift +F8,** and then select the next comment to be added and press the **Space Bar.** Mark each entry in this manner and then click on **Add.**

▷ **Save Text -** If **Comments** are to be used repeatedly, type the information into the field, highlight the text and click on the **Save Text** button below the entry field. The information is saved for future entries and is available to all users in the practice when the **Comment** button is used.

2.3.7 Protocols

A Trust System Administrator may configure some tests to prompt for additional information, before the test can be ordered. When these items are selected, a pop up window will open and display the relevant questions.



Mandatory questions will be in bold text and will not allow the user to proceed until they are completed. Depending on the answers, further questions may be asked. The outcome of the questions will determine whether the test can be ordered or not. If the test can be ordered it will be displayed in the **Ordered Items** pane. (See section ***2.3.6 Ordered Items***.)

2.3.8 Extended Group Questions

Extended Group Questions are bespoke groups of questions and/or instructions they are unique to each Trust and developed to the Trust's specific requirements.

Extended Group Questions can be prompted when either specific **Orderables** or associated **Disciplines** are requested.

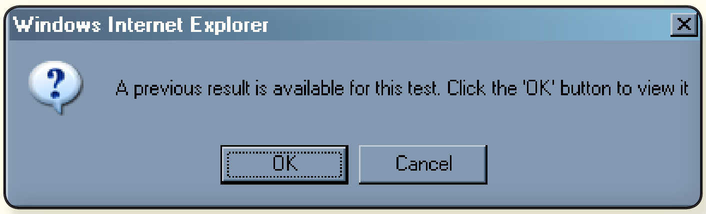
The questions will appear when the requester either selects **Save** or **Finish** at the end of a request. The requester is guided through a series of questions. The answers may prompt either further questions or add items to the request. A red asterisk indicates this is a mandatory field.

The final screen has a **Save** button which will complete the process. Any incomplete fields will be highlighted with a red asterisk and prevent the request from being completed.

2.3.9 Previous Available Results

As items are selected, tQuest performs a background check on the EMIS Health Review server, to determine if there are any results for that test. This is dependent on the laboratory having EMIS Health's Review software and the availability of a valid current result. The lookup uses either the Unique Patient Identifier or a combination of the Unique Patient Identifier, Date of Birth, Sex and Family Name. The demographics used to perform this lookup are determined by the Trust.

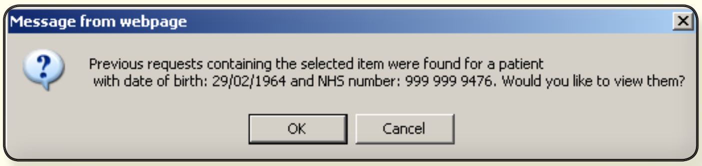
Where a current result is available, an alert will advise the user that there is a current result available.



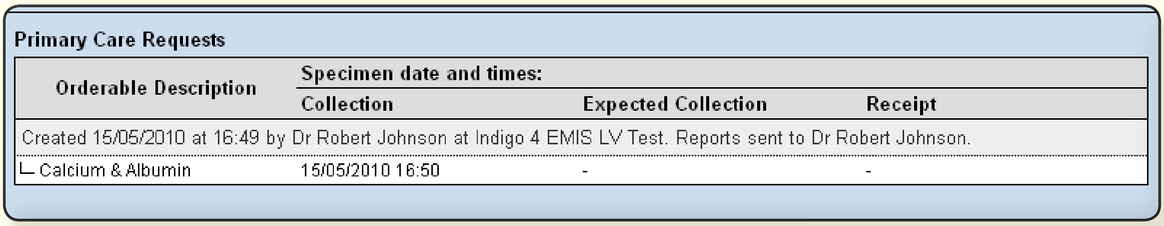
Selecting **OK** will display the report which includes the previous result. (*See Review User Manual*.) The original request for the test may have been generated from another GP surgery, outpatient clinic or while the patient was in hospital. The report will show regardless of the requesting source. A further prompt gives the option of either cancelling the request for the item, or continuing to add the item to the request.

2.3.10 Outstanding Request

As items are selected, tQuest performs a background check to determine if there are any outstanding requests for that test and patient. If an outstanding request is identified, an alert will advise the requester of an existing request and offer to display the request details.



Selecting **OK** will display the request details.



Primary Care Requests

Orderable Description	Specimen date and times: Collection	Expected Collection	Receipt
Created 15/05/2010 at 16:49 by Dr Robert Johnson at Indigo 4 EMIS LV Test. Reports sent to Dr Robert Johnson.			
└ Calcium & Albumin	15/05/2010 16:50	-	-

The original request for the test may have been generated from another GP surgery, outpatient clinic or while the patient was in hospital. The request details will show regardless of the requesting source. A further prompt gives the option of either cancelling the request for the item, or continuing to add the item to the request. **Note:** Only requests made using tQuest will be displayed.

2.3.11 Collect Sample Buttons

For sites that are configured to collect their own pathology samples, there are three buttons below the **Ordered Items** pane:

- Now
- Later - Unknown date
- Later - Specific date

For sites that have the Community Order Printing (COP) module installed a further four options are available.

- District Nurse - Unknown Date
- District Nurse - Specific Date
- Phlebotomist - Unknown Date
- Phlebotomist - Specific Date

NOTE: If any of the above COP options are selected no forms or labels will be printed at the practice.

▷ **Now -** The **Now** radio button should be selected if the sample is being taken immediately by the requester. Selecting **Now** will add the current date and time to the request form and will disable the **Save** button. It will only be possible to **Finish** the request. The request form and/or labels will be printed.

▷ **Later - Unknown date -**This button is selected either when the person ordering the test will not be taking the sample and the patient is to attend a clinic (either at the GP surgery or another location), or the requester may wish to edit the request before printing it. Selecting this radio button will allow the user to either **Finish** or **Save** the request. If the user selects **Finish**, the collection date and time field is left blank on the request print out. This allows either the sampler to manually enter the information, or for external samplers (for example, at hospital phlebotomy clinics) to enter the details with EMIS Health's Sampler. **Note:** Finished requests cannot be accessed from the PMS to add sample details. Selecting **Save** will save the request for the requester to edit the request, or for another user to access at the time of collecting the sample. (See section ***5.4 To Complete a Request Started by Another User***.) Radiology investigations cannot be saved, selecting **Save** for requests that include a Radiology order will automatically generate a print out for those investigations. In this scenario, an order that includes both Pathology and Radiology items when saved, will produce a print out for all Radiology investigations and **Save** the Pathology items only.

▷ **Later - Specific Date** - This radio button is selected when the sample will be collected at a future known date, either at the GP surgery or another location. Selecting **Later - Specific Date** allows a date to be selected by clicking on the **Planned Date** button. When a date is selected it will show on the **Planned Date** button. Users can either **Finish** or **Save** the request. **Finished** requests will generate a request print out which includes the expected date. This can be used as a reminder for the patient and will require the sample collector to write the time of collection onto the request.

▷ **District Nurse - Unknown Date** - This radio button is selected when the sample will be collected by a District Nurse in the community at a future unknown date

▷ **District Nurse - Specific Date** - This radio button is selected when the sample will be collected by a District Nurse in the community at a future known date.

▷ **Phlebotomist - Unknown Date** - This radio button is selected when the sample will be collected by a Phlebotomist in the community at a future unknown date.

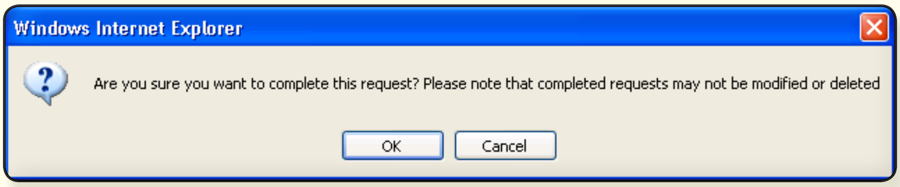
▷ **Phlebotomist - Specific Date** - This radio button is selected when the sample will be collected by a Phlebotomist in the community at a future known date.

The sample collection options for District Nurses and Phlebotomists will be disabled if a pathology orderable on the request cannot be sampled by a District Nurse or Phlebotomists. In addition, selecting these Sample Collection options will only allow the request to be finished and not saved.

The sample collection options for District Nurses and Phlebotomists will be disabled if the request is not for the NHS category.

The laboratory will periodically remove any requests when they do not receive samples. Selecting the **Later - specific date** button will retain the request on the laboratory system until after the specified date.

Note: When the Finish button is selected, a prompt will inform the user that the request is completed and it is not possible to make any changes. Requests forms and/or labels will always print when the Finish button is selected.



If a user attempts to sample a completed request, a prompt will inform the user that it is not possible to update the request.

Care should be taken when labelling samples and bags to ensure that the labels are applied to the correct items, for the correct patient. The opportunity for mistakes to occur is increased when the paperwork, printed from the system, is not used as soon as it is generated. Situations in which multiple users share a printer increase the risk of mistakes.

It is important when labelling samples that the stickers are applied in accordance with the instructions from the laboratory. For example, most laboratories will ask that sample labels are applied along the long axis of the tube. Poor application of sample stickers can lead to delays in the laboratory's workflow and the subsequent delivery of the results.

2.3.12 View Previous Test Results

For sites that have tQuest configured to work with EMIS Health's Review software, a **View Previous Test Results** button will be present.

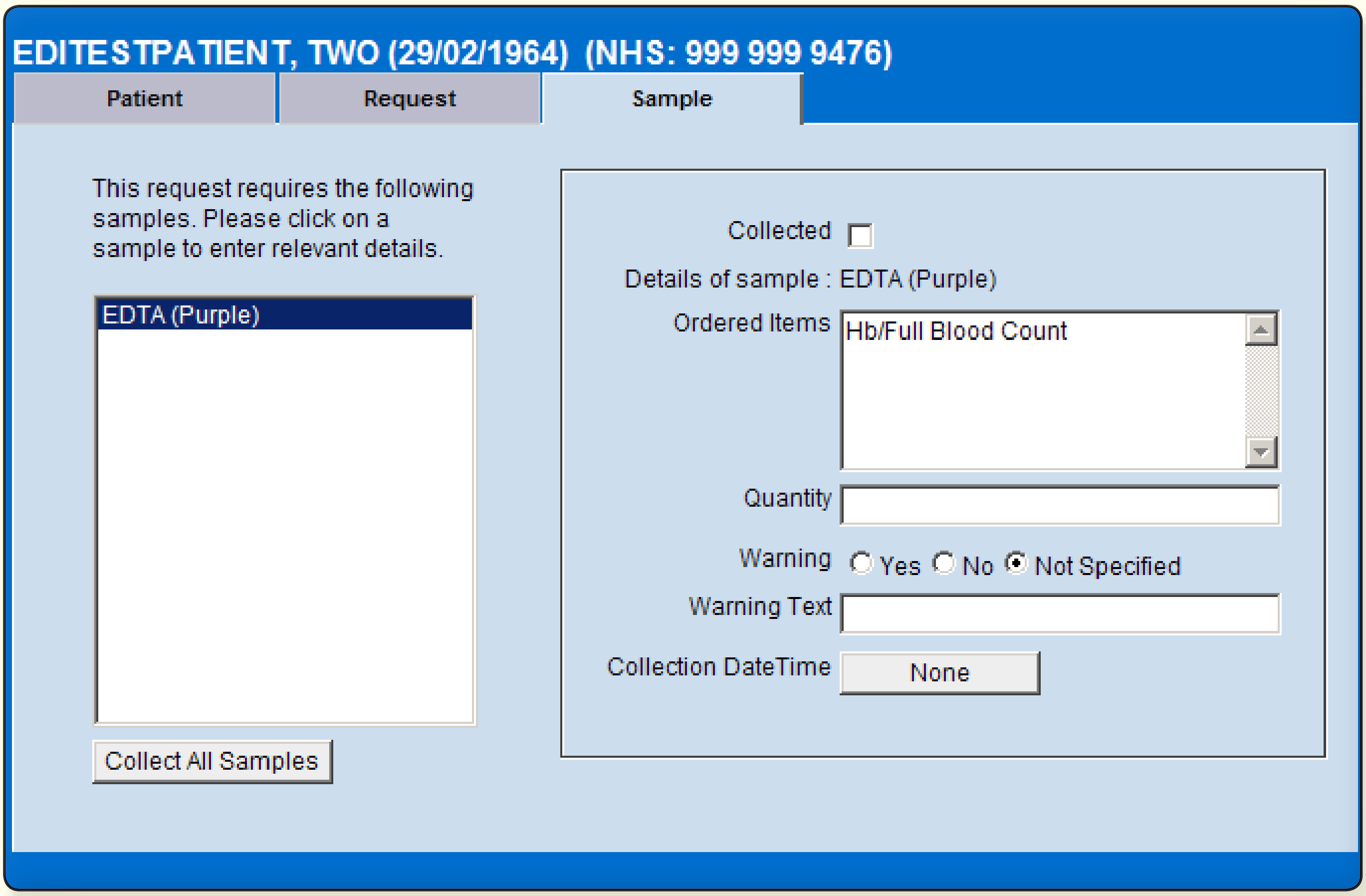
Clicking this button will open Review to display any previous test results for the patient, as long as they have a valid Unique Patient Identifier. (See the *Review User Manual*.)

3 Collecting a Sample

From the patient's record in the PMS, select the **Sample Now** option. Refer to the relevant Quick Start Guide for details of how to access tQuest to **Update** or **Sample** the request. (See *7 Associated Documents* for the list of Quick Start Guides.) The **Order** tab is replaced by the **Sample** tab.

3.1 Sample

The **Sample** tab displays for all practices that will be collecting their own samples.



The **Sample** tab is populated with details of the tests to be carried out. The left side of the screen has details of the test name(s) and sample types to collect the sample (If relevant).
Selecting the sample in this pane will display the tests in the **Ordered Items** pane on the right. Below the sample pane is the **Collect All Samples** button. Clicking on this button will highlight all the sample requests in the samples pane and add the current server date & time onto the **Collection Date Time** button, on the right of the screen.

- ▷ **Collected -** Adding a tick in this check box after highlighting the item in the **Ordered Items** pane, allows individual items to be collected. This option is used on occasions when all samples on the request are not collected at the same time.

- ▷ **Details of Sample -** The details of the sample that are highlighted in the **Samples** pane on the left side of the screen are entered in this field. Selecting another sample in the **Samples** pane will change these details.

▷ **Ordered Items** - Details of all Items ordered will be listed in this pane.

▷ **Warning -** Select the relevant radio button for any warnings that are relevant to the samples.

▷ **Warning Text** - This is a free text field for supporting information when a warning is selected.

▷ **Collection Date Time -** This button defaults to **None**. Selecting the **Collect All Samples** button will change to the current time and date of the server. Alternatively, click on the button and select the appropriate date and time from the calendar when the sample was collected on another date and time, to the current default.

The bottom of the screen has three buttons:

▷ **Delete -** Click on the **Delete** button to remove uncollected samples and associated tests.

▷ **Finish -** Click on the **Finish** button when samples are collected. The request form and/or labels are then printed out. Once the **Finish** button is clicked, the collected samples cannot be changed by the practice users and is moved to the **Complete** tab, (see section *4.2 Complete*) the information is then available to the lab.

▷ **Cancel -** Click on the **Cancel** button to close the **Sample** view, without saving any changes.

3.1.1 To Collect all Samples on an Order

The most frequently used option on the **Sample** screen is **Collect all Samples**.

From the patient's record in the PMS select the **Sample Now** option. Refer to the relevant Quick Start Guide for details of how to access tQuest, to sample the request. (See section *7 Associated Documents* for the list of Quick Start Guides.)

1 Click the **Collect All Samples** button.

2 The current server date and time will be added to the **Collection Date/Time** button.

3 Click the **Finish** button.

4 The request form and/or labels will print out.

5 The collected items will move from the **Incomplete** tab (see section *4.1 Incomplete*) to the **Complete** tab. (See section *4.2 Complete*.)

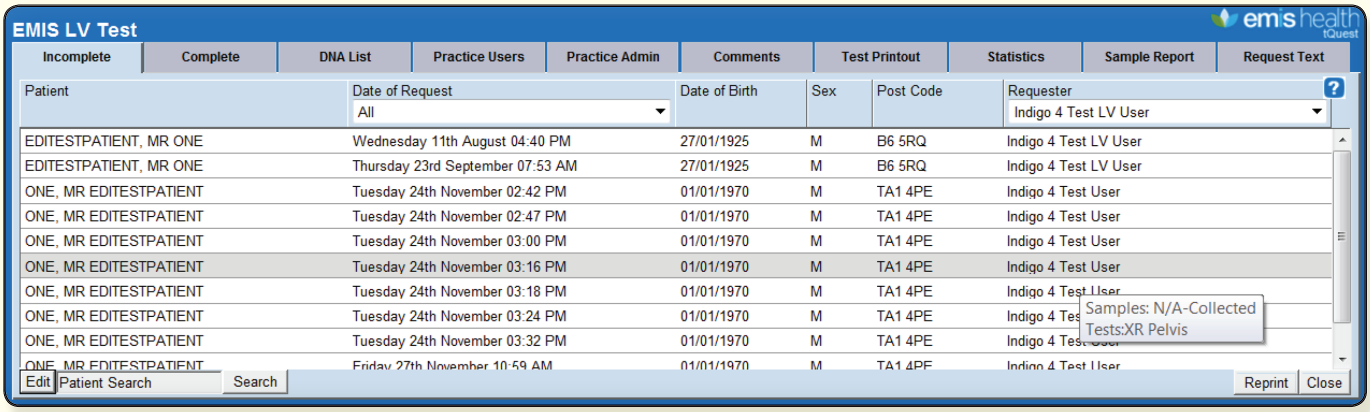
3.1.2 To Collect Individual Items on an Order

There may be occasions when not all samples are collected on the same visit. It is possible to collect individual items, in this situation, the collected samples will remain on the **Incomplete** tab. (See section *4.1 Incomplete*.) The collected samples will move to the **Finished Items** tab which is seen, when the **Edit** button is clicked on the **Incomplete** tab. The uncollected samples can be seen on the **Unfinished** tab.

1. From the patient's record in the PMS select the **Sample Now** option. Refer to the relevant Quick Start Guide for details of how to access tQuest to sample the request. (See section *7 Associated Documents* for the list of Quick Start Guides.)
2. On the left of the screen, highlight the item to be collected.
3. Click the **Collected** box, to add a tick.
4. Click the **Finish** button.
5. The request form and/or labels for the completed item will print out.
6. The collected items will move from the **Incomplete** (see section *4.1 Incomplete*) tab to the **Complete** tab. (See section *4.2 Complete*.) All outstanding items will remain on the **Incomplete** tab until they are collected.
7. A **Collected** tab will show the next time a user views the **Sample** screen. The **Collected** tab shows details for all samples that were collected from the original request.

4 GP Admin

The practice Admin for tQuest can be accessed from the user's PMS. Refer to the relevant Quick Start Guide for details of how to do this. (See section *7 Associated Documents* for the list of Quick Start Guides.)



The screen opens with the following tabs along the top.

- Incomplete (see section *4.1 Incomplete*)
- Complete (see section *4.2 Complete*)
- DNA List (see section *4.3 DNA List*)
- Practice Users (see section *4.4 Practice Users*)
- Practice Administration (see section *4.5 Practice Administration*)
- Comments (see section *4.6 Comments*)
- Test Print out (see section *4.7 Test Print Out*)
- Statistics (see section *4.8 Statistics*)
- Sample Report (see section *4.9 Sample Report*)
- Requests Text (see section *4.10 Request Text*)

The name of the practice appears on the top left of the screen. The online help icon is on the top right of the screen on all tabs, giving access to the tQuest manual.

4.1 Incomplete

The main body of the Incomplete tab, details all requests that have been created and are waiting for samples to be collected. Holding the mouse over any of the lines will present a tool tip with the details of the request. The request details are listed under the following columns:

- **Patient -** The patient name as entered on the PMS.

▷ **Date of Request -** The date and time the request was generated.

▷ **Date of Birth -** The patient's DOB as entered on the PMS.

▷ **Sex -** The gender of the patient as entered on the PMS.

▷ **Post Code -** The patient's postcode as entered on the PMS.

▷ **Requester -** The name of the person the request was generated by, or on behalf of. (See section *4.1.2 Requester*.)

The bottom of the screen has the following buttons.

On the left of the screen:

▷ **Edit -** Highlight one of the outstanding requests to open the original information entered by the requester. If the **Incomplete** tab was accessed from the PMS using the options to view **Incomplete Requests** or **Patient Request Lists**; the **Edit** button will take the user to the **Sample** screen, (see section *4.1 Incomplete*) with the **Patient** (see section *2.1 Patient*), **Request** (see section *2.2 Request*) and **Questions** tabs showing (if questions were answered). If the **Incomplete** tab was accessed from the PMS using the options to view **Complete Requests**, **Location Reports** or the **Full Sample Queue**; the **Edit** button will show the **Patient**, **Request**, **Unfinished Items** and **Questions** tabs and the information will be read only.

▷ **Search -** It is possible to search for outstanding requests for specific patients, enter the patient's name in the **Patient Search** field and click on the **Search** button to the right. All **Incomplete** requests for the patient are displayed in the main pane.

On the right of the screen:

▷ **Reprint -** If an **Incomplete** request contains any collected samples, it is possible to reprint those request forms by clicking the **Reprint** button. If the request does not contain any collected samples, the **Reprint** button will be greyed out.

▷ **Close -** Clicking on the **Close** button will return the user to the PMS.

4.1.1 Date of Request

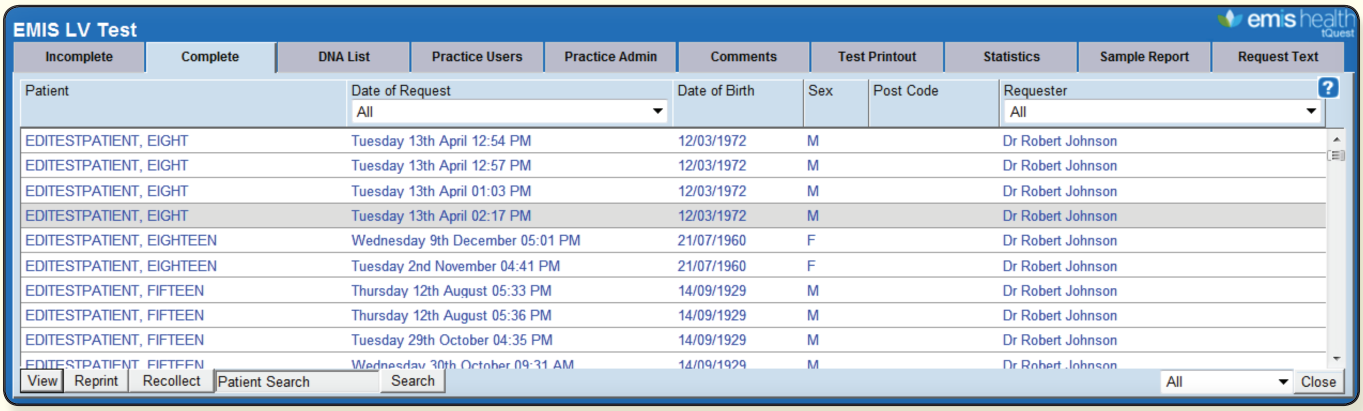
The date of request can be filtered to see requests that were made within specific time frames; the drop down list on the right of the field allows the user to filter the information. The date and time are those on which the request was initially generated; any alterations to the request and subsequent saving will retain and display the details of when it was originally saved.

4.1.2 Requester

The **Incomplete** screen can be filtered to see requests that were made by or on behalf of a specific requester, the drop down list on the right of the field allows the user to filter the information.

4.2 Complete

A request is complete once all the tests are sampled and the user clicks on **Finish** either on the **Sample** view, (see *section 4.1*) or the **Order** view. (See section *2.3 Order*.)



The **Complete** screen is divided into the following columns:

▷ **Patient -** The patient name as entered on the PMS.

▷ **Date of Request -** The date and time the request was generated. **Date of Birth** - The patient's DOB as entered on the PMS.

▷ **Sex -** The gender of the patient as entered on the PMS.

▷ **Postcode -** The patient's postcode as entered on the PMS.

▷ **Requester -** The name of the person the request was generated by or on behalf of.

The bottom of the screen has the following buttons.

On the left:

▷ **View -** Highlight the request and then click on the **View** button. This will display the details of the request on screen; the details are for information only and cannot be altered from this view; the only options are **Back,** to return to the **Complete** view, or **Close** to exit tQuest. When the **View** button is used to see the details of an **Incomplete** request, the following tabs will show (dependent on the individual request).

- ***Patient -*** The patient's details as entered on the PMS and which were included on the original request.
- ***Request -*** The details which were completed on the original request.
- ***Finished Items -*** Lists the disciplines and the samples which were collected under that discipline, and their associated orderables. The Order Reference Number corresponds to the barcode on the printed Request Form (printed when the Finish button was selected at the time of sampling); the printed form is included with the sample and sent to the Lab from the practice. Each sample description details the current Lab status and may be Not Received, Received, Damaged, Entered or Reported. The local code (Lab code) of the test appears

after the test description.

- ***Questions -*** This tab displays any Protocol questions and answers asked at the time of selecting an orderable. (See section ***2.3.7 Protocols***.) The questions are grouped under the orderable. There may also be questions relating to a discipline which is part of the order.

- ***Extended Questions -*** This tab displays any questions and answers asked at the time of selecting an orderable. (See section ***2.3.8 Extended Group Questions***.)

▷ **Reprint -** Clicking the reprint button allows a duplicate request form to be printed.

▷ **Recollect -** To recollect any samples, click on the **Recollect** button. A warning will display, advising that a new request will be created and recorded in tQuest. Click on **OK** and the original **Sample** screen will display. (See section ***4.1 Incomplete***.) Recollecting samples does not create a new request in the PMS.

NOTE: if the selected test within the Completed list was originally requested for Community Order Printing, e.g. for a District Nurse or Phlebotomist to sample, the Recollect button will be disabled and tQuest will inform the user a new request should be made.

▷ **Search -** It is possible to search for completed requests for specific patients. Enter the patient's name in the Patient Search field and click on the **Search** button to the right. All completed requests for the patient will be displayed in the main pane.

On the right of the screen is a filter and the **Close** button. Clicking on the **Close** button will return the user to the PMS. The **Request Status Filter**, allows the completed requests to be filtered according to their status in the Lab, it contains the following statuses:

▷ **All -** Lists all requests from the practice.

▷ **Not Received -** Lists all requests from the practice from which the laboratory has not received any samples.

▷ **Received In Part -** Lists all requests from the practice where some samples for the request have been received by the laboratory.

▷ **Received In Full -** Lists all requests from this practice where the laboratory has received all the samples.

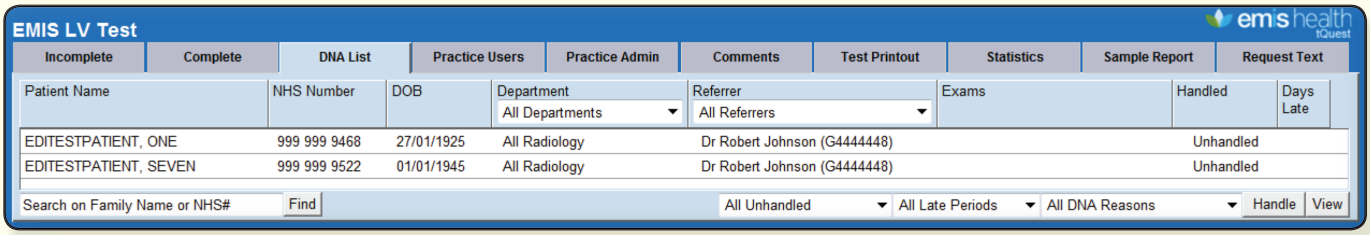
▷ **Processed -** Lists all requests from this practice where the laboratory has processed all the samples.

▷ **Reported In Part -** Lists all requests from this practice where some of the tests ordered in the request have had results reported by the laboratory. Outstanding results will be reported on, and at that time the request status will become **Reported in Full**.

▷ **Reported In Full -** Lists all requests from this practice, where the laboratory has reported the results on all the tests ordered in the request.

▷ **4.3 DNA List**

The DNA (Did Not Attend) List tab is only present for Trusts that allow radiology requests via tQuest and is not present for all practices. The details of patients who have not attended their appointments, did not book an appointment or did not attend a drop in clinic within a specified time period, will be listed on this screen. The first 100 DNA's will be listed on the screen, a warning will advise if there are more than 100. Filters on the **Department** and **Referrer** columns and on the bottom right of the screen, can be used to view DNA's which are older than the initial 100 on display. There is an option to take action on any of the DNA's on the list. This action is fully audited and the information can be retrieved by EMIS Health.



The DNA List tab is divided into the following columns:

▷ **Patient Name -** The full name of the patient.

▷ **Unique Patient Identifier -** The patient's Unique Identifier, usually this is either CHI or NHS number.

▷ **DOB -** The patient's date of birth.

▷ **Department -** The department to which the request was made. A drop down list allows the DNA list to be filtered by department.

▷ **Referrer -** The name of the person the request was generated by or on behalf of.

▷ **Exams -** Details the examinations that were requested. Occasionally, the full details will not display when more than one test is on the request. A tool tip will show all of the tests when the mouse is held over the column.

▷ **Handled -** Details if any action has been taken for the DNA. The options are:

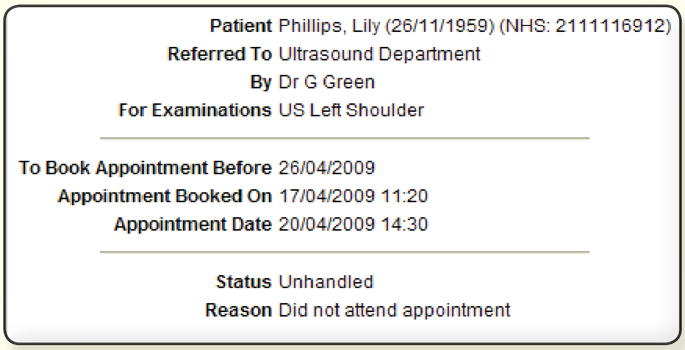
- ***Unhandled -*** No action has been taken.
- ***Handled -*** Action has been taken for this DNA, for example the patient has been contacted.
- ***Unhandled with notes -*** An entry was made by a practice user for this DNA but the status has not changed, for example attempted to contact patient but no response.

▷ **Days Late -** The number of days that the patient is late, this information is dependent on the department's appointment system.

- If an appointment is required for the test and the patient made the appointment (within the expiry period) but did not arrive, the days late count will begin the day after the appointment was missed.
- If an appointment is required, and the patient did not make the appointment within the allocated expiry period, the days late count begins the day after the expiry period.

- If the department runs a drop in clinic, and the patient does not attend any clinic within the allocated expiry period, the days late count begins the day after the expiry period.

In all cases when the expiry date passes, the patient will require a new referral to continue their treatment.


Patient Phillips, Lily (26/11/1959) (NHS: 2111116912)
Referred To Ultrasound Department
By Dr G Green
For Examinations US Left Shoulder

To Book Appointment Before 26/04/2009
Appointment Booked On 17/04/2009 11:20
Appointment Date 20/04/2009 14:30

Status Unhandled
Reason Did not attend appointment

The bottom left of the screen has a field to search for specific patients, by using either the family name or their Unique Patient Identifier. The search will be made using the current filters that are set on the right side of the screen. If no results are found, (but results could be found with different criteria) a prompt will advise the user. The user has an option to view these results by clicking on the **OK** button.

The bottom right side of the screen has three filters and two buttons. The filters are:

▷ **Handled -** The status in the handled column can be filtered to show handled, unhandled with notes and unhandled DNA's.

▷ **Late Periods -** A list of preset time periods allows the DNA list to be filtered.

▷ **DNA Reasons -** The **DNA list** can be filtered according to reason. The options are: did not attend drop in clinic, did not book appointment and did not attend appointment.

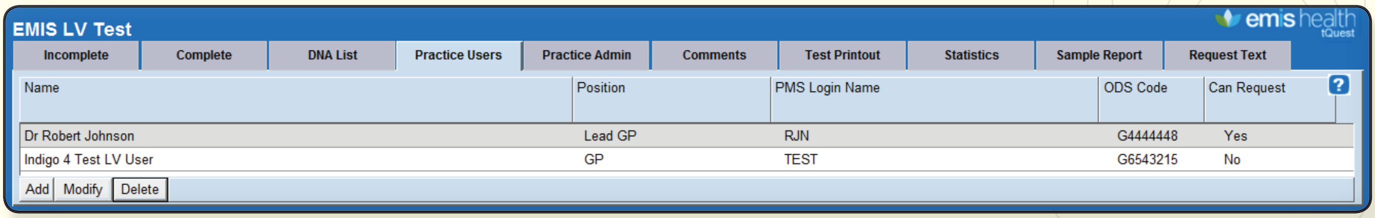
The two buttons are:

▷ **Handle -** Clicking on the button gives the user the option of taking action on the highlighted DNA.

▷ **View -** Clicking on the **View** button will show the details of the unattended referral.

4.4 Practice Users

The **Practice Users** tab allows the practice to configure the list of tQuest users. The original list of users is managed by a System Administrator at the time of implementation, the housekeeping of this list is then managed at practice level.:



Name	Position	PMS Login Name	ODS Code	Can Request
Dr Robert Johnson	Lead GP	RJN	G4444448	Yes
Indigo 4 Test LV User	GP	TEST	G6543215	No

The screen is divided into the following columns:

▷ **Name -** Displays the name of the practice user who has been configured to use the tQuest System.

▷ **Position -** The role of the user at the practice.

▷ **PMS Login Name -** The details the user enters into the Login field on their PMS.

▷ **ODS Code -** Displays the ODS code of the practice user (if relevant).

▷ **Can Request -** This column details the **Requesting Professional** for selection in the **Requests** view. (See section 2.2 Request.) The possible options are **No** & **Proposed**.

- ***No -*** Identifies that the user can only request on behalf of another user.
- ***Proposed -*** Informs a System Administrator that this user can make requests in their own name. The status will remain Proposed until a System Administrator takes action and changes the status to Yes.

The bottom left of the screen has three buttons:

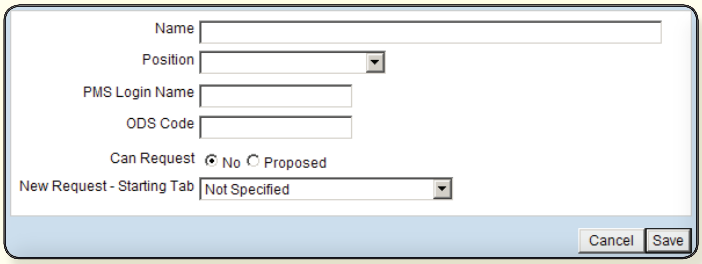
▷ **Add -** Clicking on **Add** displays the **Add User** window, for details of how to complete the window. (See section 5.4.1.)

▷ **Modify -** Allows the details of the currently highlighted practice user to be changed.

▷ **Delete -** Highlights the details of the relevant practice user on the list and then click on **Delete** to remove the user's details from the screen and the drop down list, on the **Requests** screen. This will not remove the user's details from any historical information on the PMS or tQuest.

4.4.1 To Add a New User

1 Click on the **Add** button. The **Practice User** window opens.



1 Complete the fields with the relevant information.

▷ **Name**

▷ **Position**

▷ **PMS Login Name -** The name or mnemonics that the user logs into the PMS with.

▷ **ODS Code -** The ODS code if the user has one.

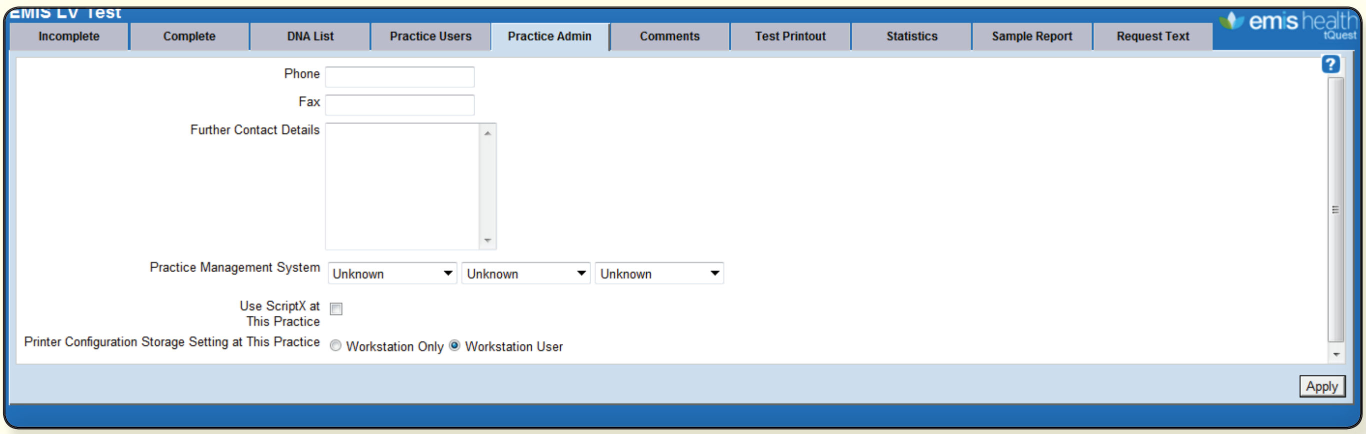
▷ **Can Request - No** identifies that the user can only request on behalf of another user. **Proposed** informs a Trust System Administrator that the user can make requests in their own name. The status will remain **Proposed** until a Trust System Administrator takes action and changes the status to **Yes**. Users who have a status of **Proposed** should complete the request using another user's name from the drop down list.

▷ **New Request - Starting Tab** - If a 'starting tab' is not specified, the requester will default to the **Order** tab. The options are: **Patient** (see section ***2.1 Patient***),**Request** (see section ***2.2 Request***), **Order**. (See section ***2.3 Order***.)

2 Click on **Save** to complete the registration. **Cancel** will close the form without saving any of the details.

4.5 Practice Administration

This tab allows the practice details to be configured and displays the option to force the Practice Users to use ScriptX for their request print outs. ScriptX is third party software required by tQuest to generate the printout of paper requests. Using ScriptX will suppress the Internet Explorer pop ups every time a request form is printed and allows the practice to identify the print margins and printer tray to be used for all on line requests. Practices that will be printing to labels only will not require ScriptX.



▷ **Phone -** The practice telephone number including the area code.

▷ **Fax -** The practice fax number including the area code.

▷ **Further Contact Details -** The practice address and postcode.

▷ **Practice Management System -** Three fields contain drop down lists to select the PMS supplier, system and version number (if known).

▷ **Use ScriptX at This Practice -** Placing a tick in this box will force all practice users to use ScriptX for request printing. (See section ***4.7 Test Print Out*** for details of testing the print outs.)

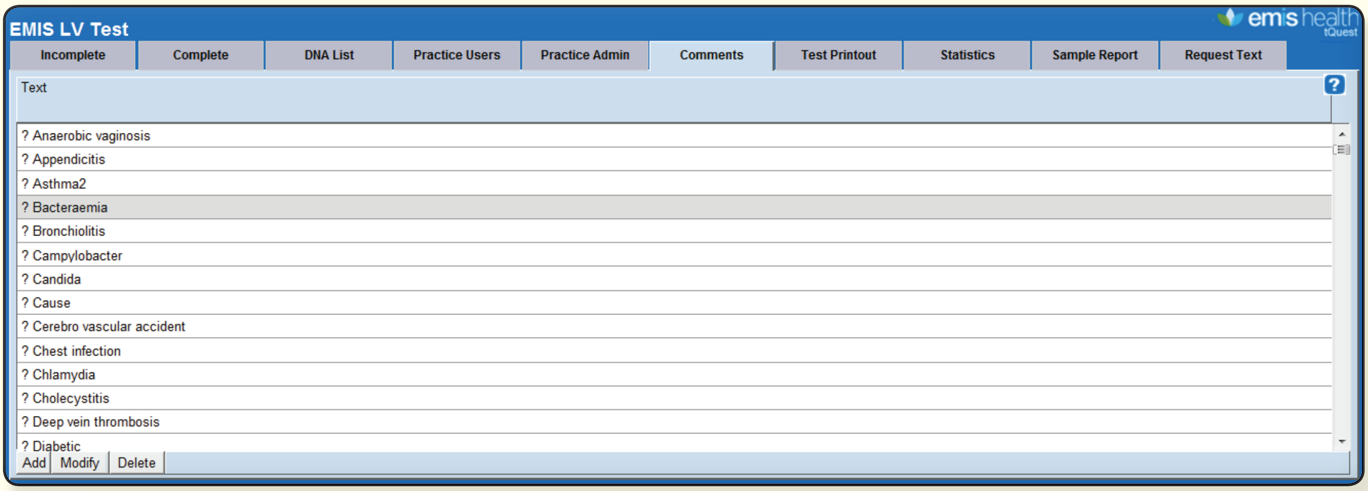
▷ **Printer Configuration Storage Setting at this Practice -** A radio button allows the practice administrator to specify where the cookies required for printing configuration are stored. The options are :

- ***Workstation Only -*** Printer settings will be stored at the workstation, this will require one user to configure the printer settings for all users of that machine. This option is recommended for practices that have the InPS Vision PMS.
- ***Workstation User -*** Printer settings will be stored for users of the machine. This will require each user of each machine to configure the printer settings.

The bottom right has an **Apply** button, this should be used to save any changes made to the settings in this section.

4.6 Comments

This tab allows the practice to maintain a list of **Comments** which may be added into any free text fields on the **Request** Form. Any **Comment** that is added to a request and saved (see section ***2.2 Request***) will be saved in this area.



Each line shows a separate comment that can be used on a request.

The following buttons can be found on the bottom left of the screen:

▷ **Add -** Click on the **Add** button to open the **Comment** dialogue window, type a new **Comment** and click on **Save** to add the new **Comment** to the list. This **Comment** is now available from the **Comment** button on the **Requests** tab. (See section ***2.2 Request***.)

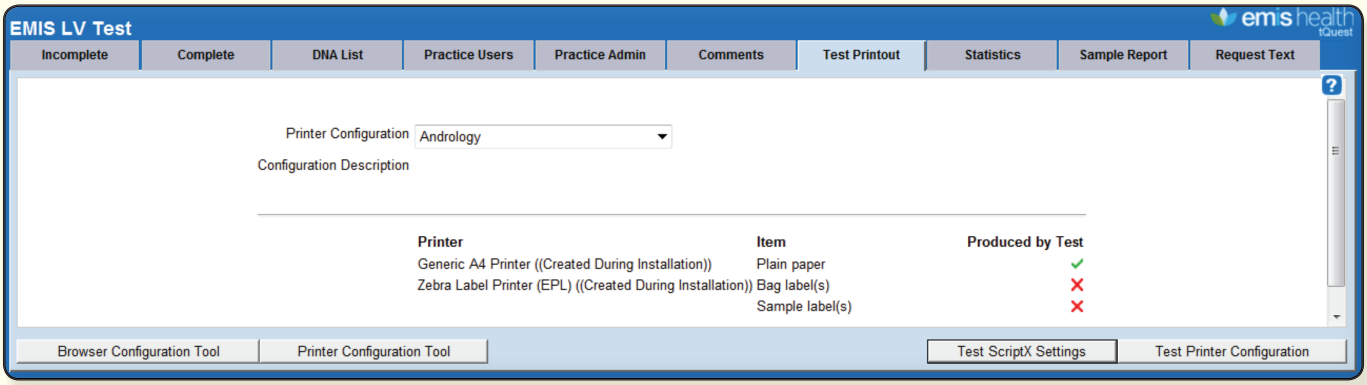
▷ **Modify -** Highlight a **Comment** to be modified and click on the **Modify** button; the **Add Comment** dialogue window opens with the current **Comment** available. Make any changes and select **Save**.

▷ **Delete -** Highlight the **Comment** to be deleted and click on the **Delete** button. This does not affect any historical entries of this **Comment**.

4.7 Test Print Out

In most cases, the Trust will complete the configuration of printers for the practice at the time tQuest is activated. It may be necessary to adjust the print margins for request print outs, as printer alignment is important when printing onto specialist stationery, for example, paper sheets that include labels. Full details for configuring the browser and printing settings can be found in the tQuest Browser Config Guide found on the website see section *7 Associated Documents*.

Practices that use specialised paper which includes labels should pay particular attention to the printing configuration. It is important that the system is set up to print all of the information for the label within the bounds of the sticker. If the information is truncated, there may be an impact on the speed and accuracy with which the laboratory can process the request. For example, if a barcode is truncated it will not scan.



The **Test Printout** screen shows with a **Printer Configuration** field. The drop down list is populated with all of the print outs that the practice will produce, when a pathology sample is collected or radiology investigation is ordered.

A green tick indicates the type of print out that will be produced for items selected in the **Printer Configuration** field. A red cross will identify when a type of print out will not be produced.

The bottom left of the screen has the following buttons:

- ▷ **Browser Configuration Tool -** Gives guidance and troubleshooting tips to assist with configuring the browser settings.
- ▷ **Printer Configuration Tool -** Allows the relevant printer to be configured for paper and label print outs.

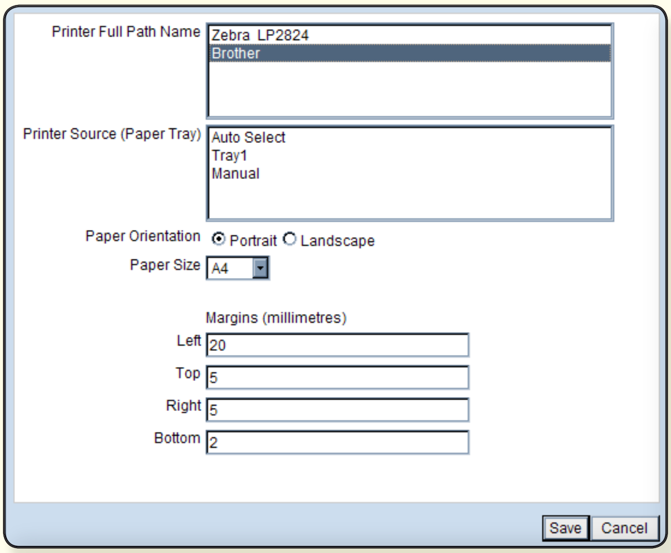
The bottom right of the screen has the following buttons:

- ▷ **Test ScriptX Settings -** This button will show when the Trust allows online test requesting for both pathology and radiology requests and where the printouts for each service use different printers, trays, orientation or margins. A test page can be printed and allows the user to adjust the print margins for paper printouts. See section *4.7.1 To Adjust Paper Print Out Margins*.
- ▷ **Test Printer Configuration -** Allows a test printout for the item selected in the **Printer Configuration** field.

4.7.1 To Adjust Paper Print Out Margins

Occasionally, it may be required for the print margins of paper printouts to be adjusted. It is important that the system is set up to print all of the information for the label within the bounds of the sticker. If the information is truncated, there may be an impact on the speed and accuracy with which the laboratory can process the request.

1 Click on the **Test (ScriptX) Settings** button on the bottom right of the screen. The following window opens:



2 Select the relevant printer from the list of available printers in the **Printer Full Path Name** field.

3 Select the relevant paper tray from the available list in the **Printer Source (Paper Tray)** field.

4 Select the relevant **Paper Orientation** and **Paper Size** from the options.

5 Suggested print margins will be present; if required, change the values.

6 Click **Save & Print**.

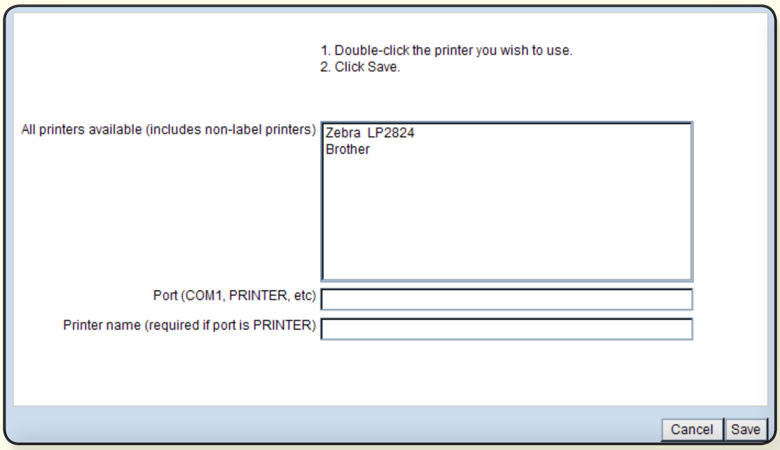
7 From the **Printer Configuration** field select the print template to be tested, click the **Test Printer Configuration** button on the bottom right of the screen.

8 Repeat steps 1-6 if further adjustment is needed.

4.7.2 To Configure QT PrintX Printing (label printing)

1 Click on the **Printer Configuration Tool** button on the bottom left of the screen.

2 Click the **Configure Label Printer** link. The following window opens:



3 Double click on the required printer in the **All Printers Available** field.

4 The **Port** and **Printer Name** fields will auto complete.

5 Click **Save**.

4.7.3 Adjusting Print Margins - Windows Printing

Windows Printing is used when the practice is not using ScriptX or QT PrintX printing.

1 Select **File** then **Page Set Up** from the top left of Internet Explorer.

2 Adjust the margins as necessary.

3 Click **OK** to save the settings.

4.8 Statistics

The Statistics view gives details of the type and number of tests that are ordered for selected date ranges. Information on this screen is only visible for Trusts that have configured a **Weight/RAD cost** for each orderable, it will not show statistics for the actual cost of requests when a price is calculated at the time an order is placed.

The screen is divided into the following columns:

- ▷ **Orderable Description -** The name of the orderable displayed when requested.
- ▷ **No. of Orders -** The number of orders in the specified date range.
- ▷ **Weight/RAD Cost -** The relative value of the test at the time the order was placed. The Trust System Administrator may configure tests in price bands, this field is used to indicate which band the test is included in.

The bottom of the screen has the following buttons and filters:

▷ **Date From & Date To -** Click the **Date From** button. A calendar displays, click on a date and select the month and year from the drop down lists. Complete **Date To** in the same way. The date ranges can be a maximum of six months apart.

▷ **Details -** Highlight a test and click on the **Details** button to view the requested time, the requester, and the Weight/RAD cost of the orderable when it was ordered.

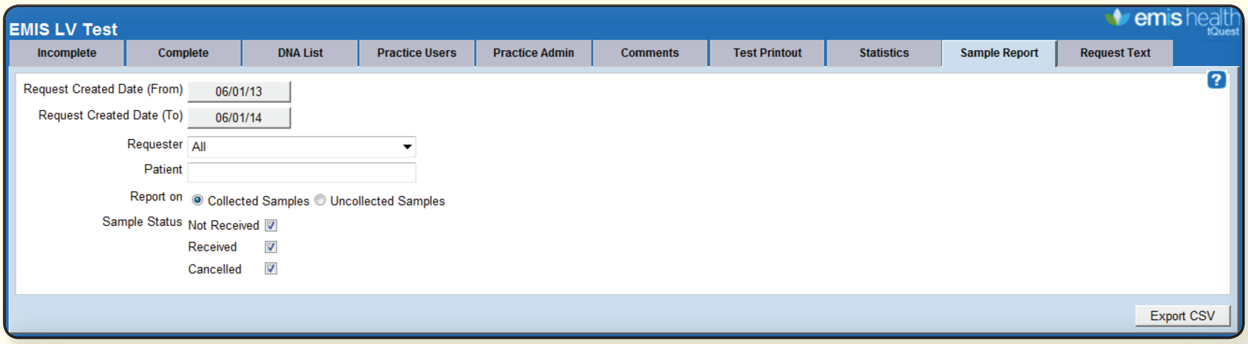
▷ **CSV Output -** Allows the highlighted report to be exported to a CSV file. The CSV file can be viewed by using spreadsheet software.

▷ **Filters -** There are three filters on the bottom right of the screen (from left to right).

- The first field filters on the status of the requests at the laboratory; it is selected from the drop down list. For example processed, reported in full, not received.
- The second filter will reorder the results according to number of tests, cost or alphabetically.
- The final filter determines whether the list should be displayed in ascending or descending order.

4.9 Sample Report

The Sample Report view allows practice administrators to create a CSV file with details of what stage in the process an order has reached. This is dependent on the laboratory providing the sample status to tQuest.



The screen is divided into the following fields:

▷ **Request Created Date (From) -** The start date for the search period.

▷ **Request Created Date (to) -** The end date for the search period.

▷ **Requester -** A drop down list allows the search to be refined to either a single requester or **All** practice staff. This is the requester who was selected as the **Requesting Professional** when the request was created. See section *2.2 Request*.

▷ **Patient -** A free text field that allows a report to be produced for a single patient, partial names are allowed in the field.

- ▷ **Report On -** Radio buttons allow the report to be compiled using either **Collected** or **Uncollected Samples**. The report uses the information on the **Incomplete** tab (uncollected samples), see section *4.1 Incomplete* or **Complete** tab (collected samples), see section *4.2 Complete*.

- ▷ **Sample Status -** Tick boxes allow different statuses to be included in the report.

The bottom right of the screen has an **Export CSV** button, clicking this button when the fields are completed will give the user the option of either viewing or saving the CSV report.

4.10 Request Text

This information is configured by the Trust System Administrator to suit local requirements, an example of **Request Text** may include details of the opening hours of the phlebotomy clinic. The Trust System Administrator will specify the default **Request Text** for the practice, who then may choose alternative text to be used. The screen is divided into the following columns:

- ▷ **Reference -** The title assigned by the Trust System Administrator that identifies the text.

- ▷ **Text -** The text that will be printed onto the request print out.

- ▷ **Status -** Identifies the current **Request Text** that is printed on all request forms.

The bottom of the screen has two buttons:

- ▷ **Set Default -** Highlight the relevant request text and click on **Default**. The status column will change to **Set as Default**. (The request form requires a print token to allow this action.)

- ▷ **Preview -** Allows the user to view the full body of the text.

Note: Only a System Administrator at the Trust can create new **Request Text**.

Care should be taken when labelling samples and bags to ensure that the labels are applied to the correct items, for the correct patient. The opportunity for mistakes to occur is increased when the paperwork, printed from the system, is not used as soon as it is generated. Situations in which multiple users share a printer increase the risk of mistakes.
It is important when labelling samples that the stickers are applied in accordance with the instructions from the laboratory. For example, most laboratories will ask that sample labels are applied along the long axis of the tube. Poor application of sample stickers can lead to delays in the laboratory's workflow and the subsequent delivery of the results.

5 Ordering Tests

5.1 To Order Tests for Another Practice User to Sample

1. Access the online ordering from the PMS. If the user can make requests in their own name, the default tab will be the **Order** tab. Check the **Patient** tab and **Request** tabs to ensure all relevant information for the patient is populated.
2. Click on the **Order** tab.

   Either

Place a tick in the check box if the item is on the **Common Orderables** table. (See section *2.3.1 Common Orderables*.)

Or

Select the relevant test from the **Orderables** pane (or tree view) by selecting the appropriate discipline to which the test is assigned. Highlight the relevant test and click on the **Add** button.

Or

Select the relevant tests by selecting the test group from the drop down list, next to the **Test Groups** field.

3. As each item is ordered, the details will display in the **Ordered Items** pane. (See section *2.3.6 Ordered Items*.)
4. Complete any questions that are asked as the modal window displays. (See section *2.3.7 Protocols*.)
5. Select the **Later – unknown date** radio button.
6. Click on **Save.**
7. The tQuest software will close and the user will be returned to their PMS system, with the details of the requested test(s) recorded in the patient record.

5.2 To Order Tests for Another External User to Sample

1 Follow steps 1-7 as detailed above.

2 Click on **Finish** on the bottom left of the screen.

3 A warning message appears, to indicate that the sample cannot be modified or deleted. Click on **OK.**

4 Select the printer destination and/or the **Print** button.

5 The request is printed with a blank sample time and date field, for the sampler to complete.

5.3 To Add Additional Tests to an Existing Request

1 From the PMS system, access online test requests (Update Request).

2 Follow steps 1-7 as detailed above. The **Order** screen will open and be populated with the existing request details.

Note: It is not possible to add tests if the requester has previously selected the **Finish** button.

5.4 To Complete a Request Started by Another User

1 From the PMS system access online test requests.

2 From the **Incomplete** tab select the patient to be tested.

3 Select **Edit** from the bottom left of the screen.

4 The **Sample** screen will display with details of the test request populated.

5 Highlight the item(s) to be collected by clicking on it and putting a tick in the **Collected** box, or select the **Collect All Samples** button.

6 Complete any warning fields that may be necessary.

7 Complete the collection time and date.

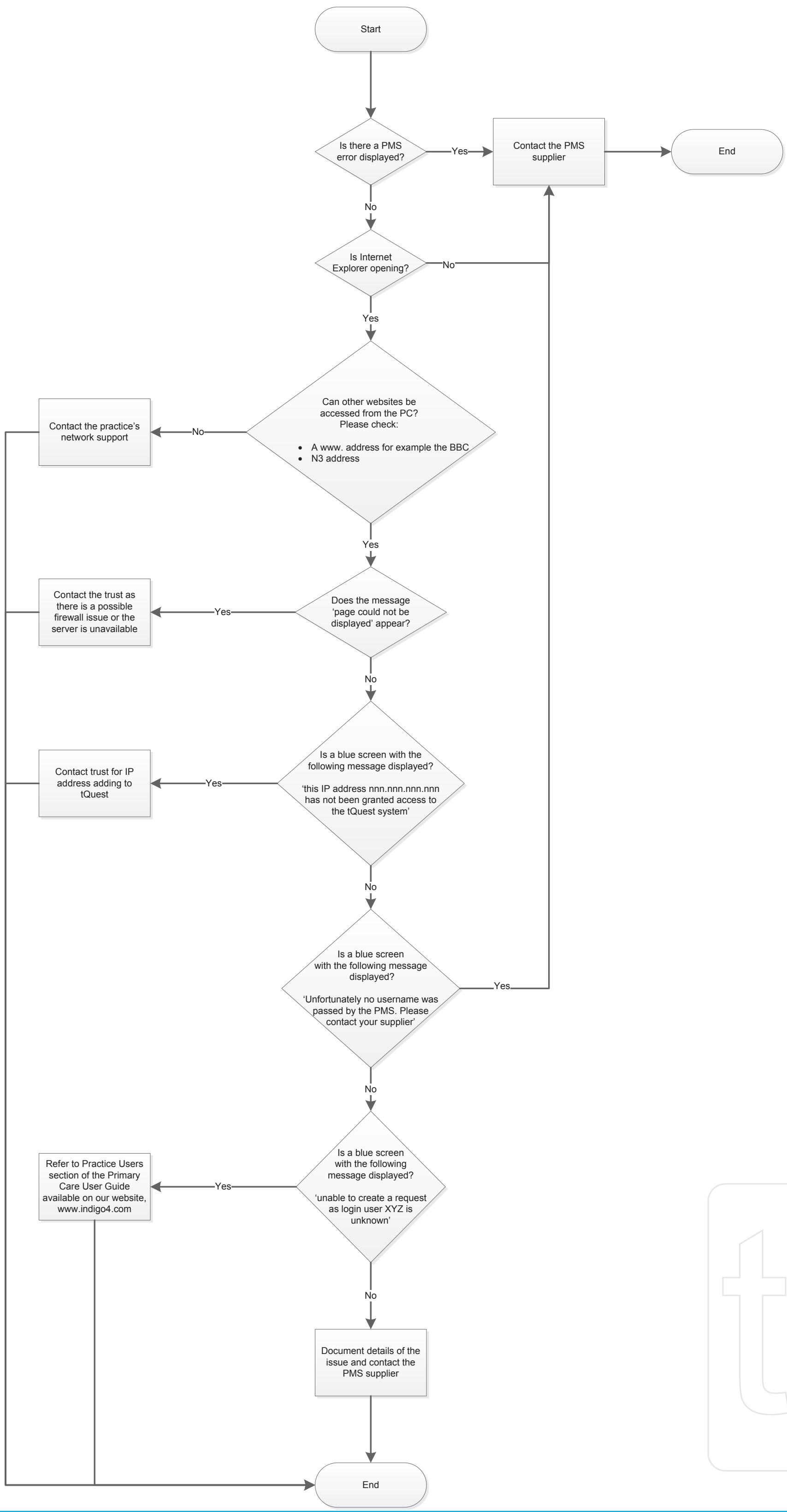
8 Click on **Finish** on the bottom left of the screen.

9 A warning message appears to indicate that the sample cannot be modified or deleted. Click on **OK.**

10 Select the printer destination and/or the **Print** button. The request has now disappeared from the **Incomplete** tab and is available for information on the **Completed** tab of tQuest.

6 Troubleshooting

Unable to Access On-line Test Requesting



7 Associated Documents

- tQuest in Primary Care
- EMIS LV & Indigo 4 tQuest
- EMIS PCS & Indigo 4 tQuest
- EMIS Web & Indigo 4 tQuest
- Advanced Health and Care Crosscare & Indigo 4 tQuest
- InPS Vision & Indigo 4 tQuest
- Microtest Evolution & Indigo 4 tQuest
- TPP SystmOne & Indigo 4 tQuest
- Review User Manual
- tQuest Browser Configuration

7.1 Downloading Associated Documents

All Quick Start Guides are available to download from the EMIS Health website at:

www.emishealth.com

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