Batching Test Orders

When you order a test in the MayoACCESS application, the order is not submitted immediately. This enables you to submit orders in batches that have something in common. For example, you might batch orders for any of the following reasons:

- The orders were created in a specific time period, such as a business day
- The orders contain the same or similar tests
- The orders contain the same or similar specimens
- The specimens in the order require the same storage or shipping temperature
- The specimens in the order are transported at the same time

Submitting a batch of orders is called closing the batch. You can close a batch of test orders at any time.

Each order in the batch has a shipping and storage temperature associated with each test specimen in the order. These temperatures are defined in the test catalog. The following temperatures are used:

- Ambient (room temperature)
- Frozen
- Refrigerated
- Miscellaneous

**Note:** Miscellaneous is used when multiple specimens include different sources that impact the preferred specimen temperature or when specimens are being sent to an outside reference laboratory that requires different specimen temperatures from Mayo Medical Laboratories. Contact Mayo Medical Laboratories to learn how to send specimens with miscellaneous temperatures.

When you close a batch, the orders are submitted to the performing laboratories and the batch is assigned one or more numbers, depending on the performing laboratory or specimen shipping temperature. Each numbered batch is associated with a batch sheet. The batch sheet lists the specimens in that batch and can be used as a packing list.

When you close a batch of orders, the orders in the batch are grouped by temperature.

This section contains information about closing a batch and printing a batch sheet.
Closing a Batch

Submitting a batch of orders is called closing the batch. You can close a batch of test orders at any time. To close a batch of orders, follow these steps:

1. On the Orders menu, click Batch Processing.

   **Tip:** Alternatively, you can click Batch Orders on the menu bar or click Batch Processing in the extended frameset.

2. On the Batch Processing page, from the Location drop-down list, select the location for which you would like to close a batch.

   The orders that are not part of a batch are shown. The Batching Status column indicates whether each order is ready as follows:

<table>
<thead>
<tr>
<th>Batching Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ready</td>
<td>The order is ready to be batched.</td>
</tr>
<tr>
<td>Incomplete</td>
<td>The order is missing information, such as answers to questions or required information.</td>
</tr>
<tr>
<td>Unbatchable</td>
<td>The order cannot be batched because of missing information, such as collection date, patient date of birth, or physician name, or because of an unknown test code.</td>
</tr>
</tbody>
</table>
3. To prepare an incomplete order for batching, follow these steps:
   a. Select the order.
   b. Click the Unanswered Questions link.
   c. Provide the missing information.
   d. Click **Save**.
      The batching status for the order changes to Ready.

4. To prepare an unbatchable order for batching, follow these steps:
   **Note:** If this is an integrated order, cancelling and recreating the order enables you to receive test results without errors. For instructions, see **Cancelling an Order** on page 60 and **Ordering a Test** on page 35.
   a. Select the order.
b. Determine the cause.

c. Click the **Edit Order** link.

d. Add the missing information, or delete the incorrect test code and add the correct one.

e. Save your changes.

The batching status for the order changes to Ready.

5. Select the orders that you want to include in a batch by clicking the check box next to each order.

   **Tip:** You can click the **Select All** link to select all the orders. If the **Select All** link is not shown on the Batch Processing page, it is available on the SmartMenu.

6. **Optional:** After you select the orders that you want to batch, preview the batch by clicking the **Preview Batch Set** link.
The Batch Set Preview window is shown.

From this window, you can view or print all the batch sheets, a specific batch sheet, or the specimen labels for this batch.

7. To close this batch, click **Close Batch Set**.

The batch sheets for this batch set are printed automatically.

**Note:** Closing a batch might also generate a Missing Information Report worksheet. Send the completed worksheet to Mayo Medical Laboratories so that the information can be added before the specimens arrive.

**Printing a Batch Sheet**

Batch sheets are automatically printed when you close a batch. To reprint batch sheets, follow these steps:

1. On the **Orders** menu, click **Batch Set List**.
2. On the Batch Set List page, click the calendar icon next to the Batch Set Date Range and specify start and end dates.

3. Click Search.

   The batch sets for that date range are displayed.

4. Select the batch set that contains the batch sheet that you want to print.

5. Click the Selected Batch Sheet link.

   Tips:
   
   - If the Selected Batch Sheet link is not shown on the Batch Set List page, it is available on the SmartMenu.
   - To print all the batch sheets in the selected batch set, click the Set of Batch Sheets link.
   - To print the specimen labels for this batch, click the Set of Labels link.
   - To print a batch sheet or set of batch sheets when you are viewing them, click Print Report.
Printing the Batch Sheet for a Specific Order

Batch sheets are automatically printed when you close a batch. To reprint the batch sheet for a specific order, follow these steps:

1. On the Orders menu, click Order Search.
   
   **Tip:** Alternatively, you can click Order Search in the extended frameset.

2. On the Order Search page, click the Search Criteria tab.

3. On the Search Criteria page, specify any of the following search criteria:
   
   - Patient name
   - Order number
   - Accession number

4. Click Search.
   
   The orders that match the specified search criteria are shown on the Orders page.

5. Select the order for which you want to print the batch sheet.

6. Click the Batch Information link.
Tip: If the **Batch Information** link is not shown on the Order Search page, it is available on the SmartMenu.

The batch set for that order is shown.

![Batch Set Image](image)

**Note:** If more than one temperature is included in the accession number, all batches are displayed for the order.

7. To print the batch sheet for the selected order, click the **Selected Batch Sheet** link.

**Tips:**

- If the **Selected Batch Sheet** link is not shown on the page, it is available on the SmartMenu.
- To print all of the batch sheets that were batched with the selected order, click the **Set of Batch Sheets** link.
- To print the specimen labels for this order, click the **Set of Labels** link.