Lab Case Tracking

The **Lab Case Tracking** feature is an easy way to manage lab work being done for your patients. This feature monitors all lab work, the laboratories they were sent to, the date sent, the date expected for return and more. Service codes can be set up to generate Lab Cases automatically when the code is walked out. During the walkout, your office staff can schedule the patient and create a Lab Case all from OnSchedule in a few quick steps.
Lab Case Tracking

Lab Case Tracking – Setup
Some setup is required when your office begins to use Lab Case Tracking. For instance, we will need to setup the following:

» Lab Case Tracking – Setup
  – Lists | Lab Tracking | Laboratories
    • Click New or Edit to create or edit a laboratory
    • Enter address and contact information for the laboratory

» Create Lab Case Types
  – Lists | Lab Tracking | Lab Case Types
    • Click New or Edit to create or edit a new lab case type

» Set Preference for Service Code
  • Edit service code and mark the preference to Generate Lab Case
Lab Case Tracking

The Laboratory Case Window

- Activities | Lab Tracking
  - This window lists all current and returned lab cases.

- **Red** – Lab case is overdue or past the due date entered into the Laboratory Cases window
- **Green** – Lab case is returned
- **Blue** – Lab case is marked as closed
- **Black** – Lab case is pending return or return date information
Lab Case Tracking

Other Lab Case window options include:

- **Find** – Type in the due date of the lab case and hit enter to search for a particular lab case
- **Include Closed Cases** – select this checkbox to view closed cases
- **Include Returned Cases** – select
- **New, Edit, Delete, Close**
- **Report** – opens the Lab Cases Master report.
Lab Case Tracking

Create or Edit a Lab Case

1. Select New to create a new lab case.
2. Select Edit to make changes to existing
3. Enter Patient and Provider
4. Select the correct Laboratory
5. Enter a Lab Case Type
6. Enter the date the Lab Case was created
7. Enter the date the lab case was Returned as well as the Date Due.
8. Other fields include Invoice Number, Shade, Fee and Description.
9. You can select to Close the Lab Case or to Add to Task List as well as the tooth / teeth involved
10. Click OK to save.
11. Click Print to print / preview the Lab Case
Lab Case Tracking

Add Images to Lab Cases
An Image button is located in the upper right of the Lab Cases screen. Select the Image button on an existing Lab Case to open the Lab Case Image Selector. This screen works similar to the Treatment Plan Image Selector. All images for the patient will appear on the left side of the screen.

» Select the image
» Enter a comment in the Comments section, if needed.
» Click OK to save.
Lab Case Tracking

**Printing Lab Cases**

There are two print options:

» Printing Lab Cases

» Printing Lab Case Reports

*To Print Lab Cases:*

» Select the Lab Case from the Lab Case Tracking window

» Click Edit

» Click Print for a preview and print

*To Print Reports:*

» From the Lab Case Tracking window, select Report

» Click Print.
Lab Case Tracking

Using Lab Cases with Walkouts

When processing walkouts with services set to generate lab cases, you can assign lab cases when the walkout is finished. There are two places you can view, edit or create lab cases when processing walkouts.

» When Processing the Walkout

- After Services are entered, click Process
- Click Lab Cases to view or edit lab cases for the patient
- Select a lab case and click Edit (If creating a new lab case, click New)
- Click Close to return to the Walkout processing
Lab Case Tracking

Using Lab Cases with Appointments

» When Finished Scheduling (or Editing an Appointment)
  • Click Lab Case
  • Select the checkbox for the lab case to add, and click Apply
  • When Lab Case attached an icon will appear
  • If the icon is red and full, the lab case has been returned or closed.
  • If the icon is pink and half-full, the lab case is open or outstanding.