# Send Lab Orders and Review Results in Clinical Exchange

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*Send lab orders to Clinical Exchange, track their status, and review the results.*

## About

NextStep connects to Clinical Exchange (CE) so you can send lab orders electronically and receive results back in NextStep. This article is for the staff who order labs and review results. Your EHR administrator sets up the Clinical Exchange lab templates and your permissions (see Set Up the Clinical Exchange Lab Interface).

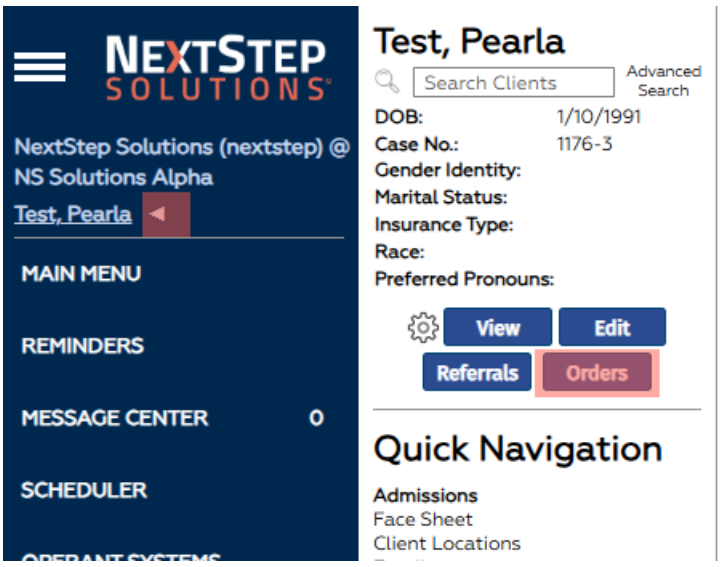
Use this article to:

- Create a lab order and send it to Clinical Exchange.
- Reopen an existing order.
- Understand lab order statuses.
- Find, assign, and review lab results.

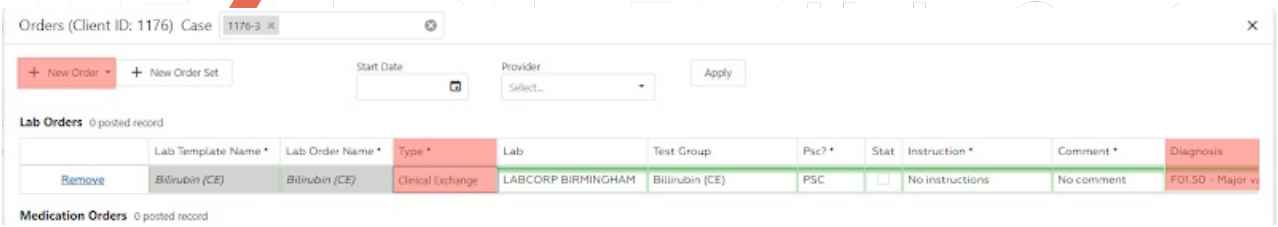
## Send a Lab Order

When you select a lab template in the Orders widget and its **Type** is **Clinical Exchange**, the order can be sent to CE. Ask your EHR administrator which templates are designated for Clinical Exchange.

1. Select a client.
2. Show the Client Details Panel.
3. Select **Orders**.




4. Select **New Order > Lab**.
5. Select a lab template.
6. Complete all required fields. If included in the order, the **Diagnosis** and the **Provider** (the ordering provider for the lab) are sent to Clinical Exchange.




NextStep also sends this information with the lab order:

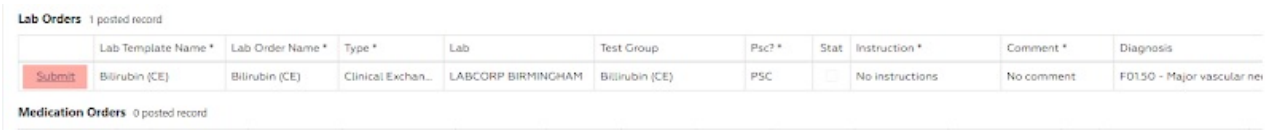
- Client demographics: First Name, Last Name, Date of Birth, and Sex. The address fields (Address, City, State, and Zip) and phone number are also required.
- The first three insurance providers listed for the client in the Insurance widget.
- Information CE uses to determine the Bill Type.

7. Select **Post**.

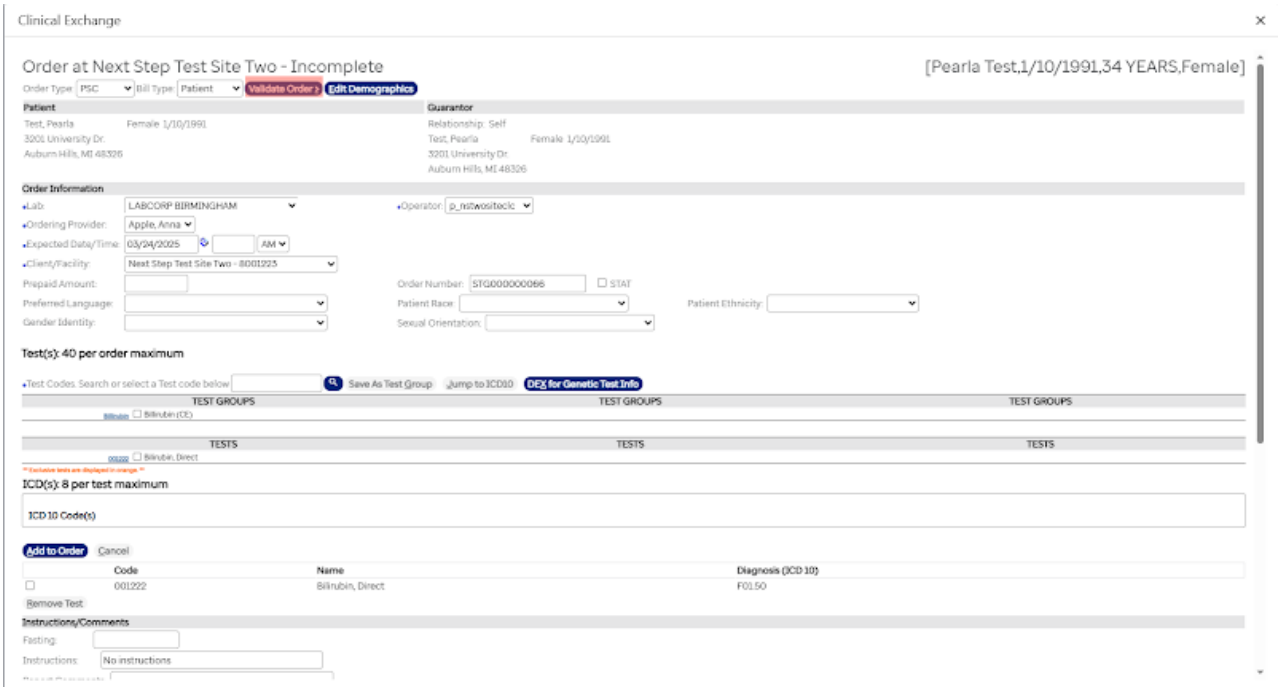



A **Submit** link appears in the first column of the lab entry. If required information is missing, a warning message appears and you must provide the missing data before you can submit.

8. Select **Submit**. NextStep sends the information to CE and opens the CE window.




9. In Clinical Exchange, select **Validate Order**.



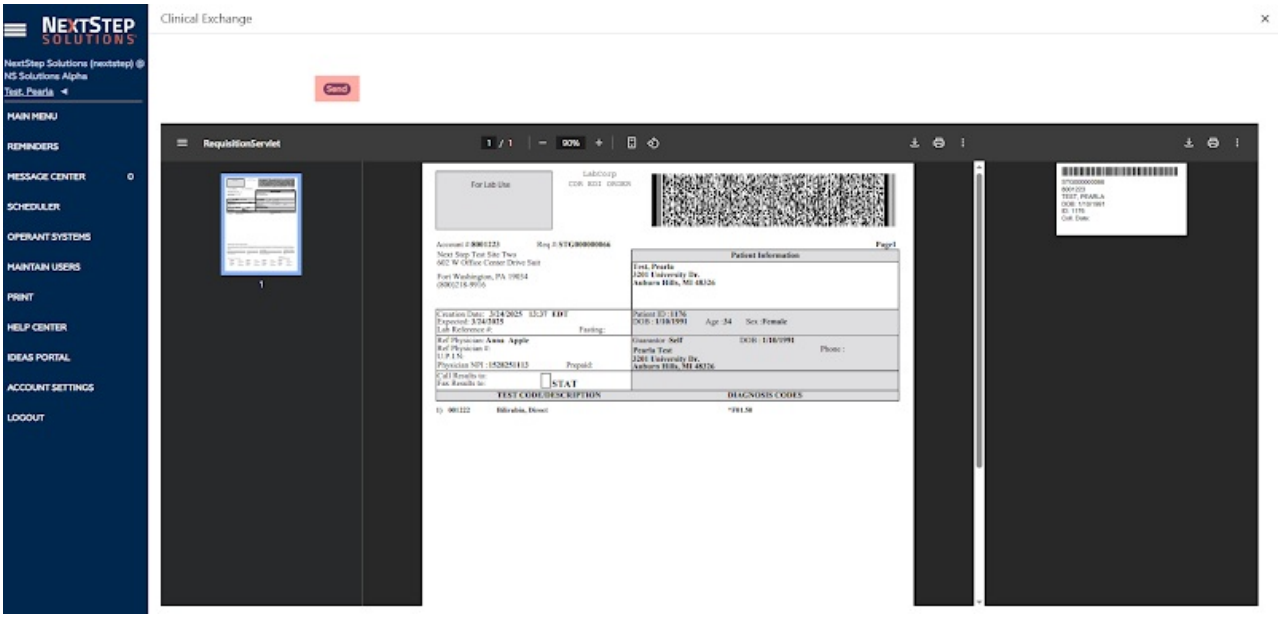

10. On the next page, print the requisition and labels if you need them.

11. Select **Send** to transmit the order to the laboratory.

**Note:** You must select **Send** in Clinical Exchange. If you close the CE window without sending, the order is not transmitted.

## Open an Existing Order in Clinical Exchange

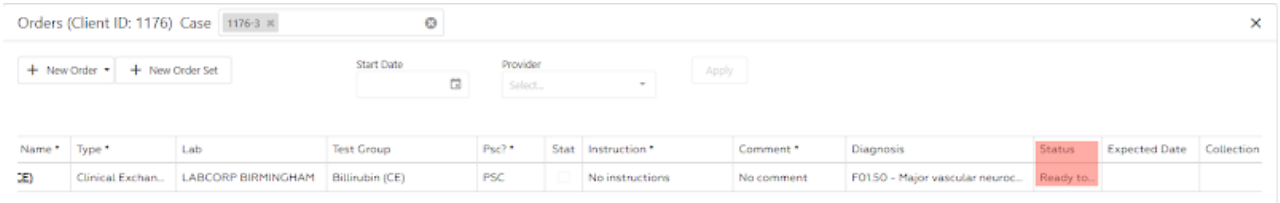
After you validate an order in CE and return to NextStep, the Orders widget shows a link under **Lab Order Name**. Select the link to reopen the order in CE, for example to view or print the requisition later.




## Check Lab Order Statuses

A lab order in the Orders widget can have one of these statuses:

| Status | What it means |
|---|---|
| Created | The lab was created in NextStep. If you select **Submit** but close the CE window before you select **Validate**, the status stays Created. |
| Inactive | The order was submitted in NextStep and validated in CE, but **Send** was not selected in CE. To transmit it, open the lab in the Orders widget, select the link under **Lab Order Name**, and select **Send** in the CE window. |
| Ready to transmit | Appears shortly after you send the order in CE. The status changes to Transmitted within 30 minutes. |
| Transmitted | The order was sent to the laboratory. |




NextStep updates lab order statuses when you close the CE window and automatically every 30 minutes in the background. You cannot change the status of a Clinical Exchange lab order yourself.

# Find Lab Results

NextStep automatically imports new lab results every 30 minutes. To review results, open the Lab Results page. You can open it in these ways:

- With a client selected, select **Treatment Planning > Lab Results** to see that client's orders from the last 30 days.
- With no client selected, select **Lab Results** to see all unreviewed results from the past 30 days for orders you entered.
- Open the Document Center (see below).

To retrieve results for one client right away, select **Fetch Results** at the bottom of the page. The button is available only when a client is selected in the search filter.

## Narrow the Results

Use the search filter to narrow the results, then select the search button.

| Filter | What it does |
|---|---|
| Client | Shows results for one person. |
| Reviewed | Shows reviewed results, unreviewed results, or both. |
| Order Date | Limits results to labs ordered within a date range. |
| Owner | Limits results to orders created by the selected user. |
| Order ID | Shows results for one order number. |
| Unassigned Only | Shows unsolicited results that are not yet assigned to a client. Selecting this option clears all other filter fields. |
| Provider | Shows results ordered by a specific provider. |
| My orders only | Shows results where you are the owner or the provider. Selecting this clears the **Owner** and **Provider** fields. |

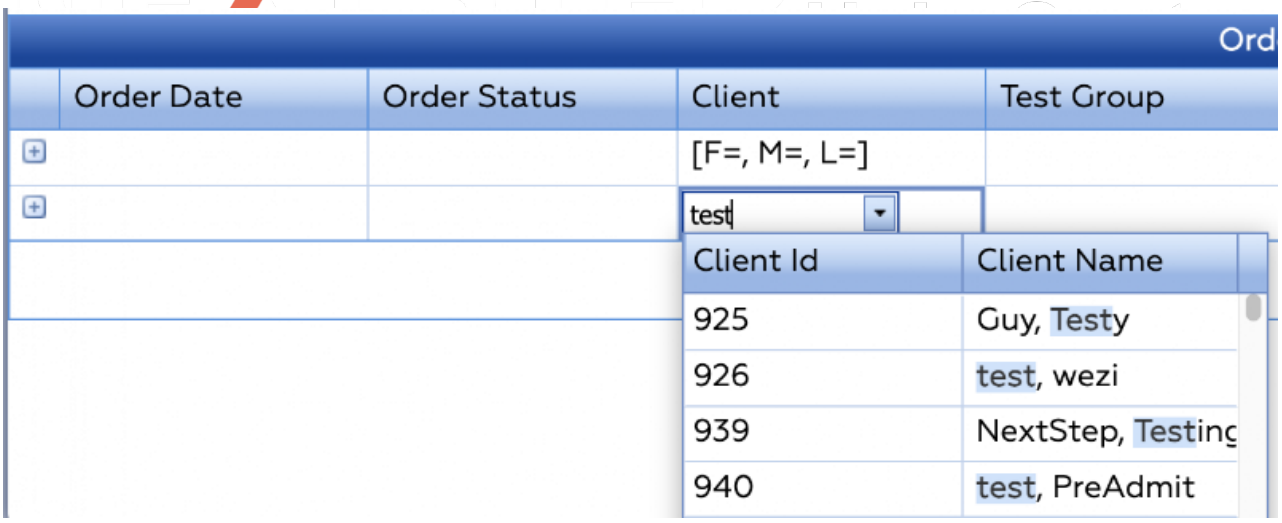
## Read the Orders Grid

The Orders grid lists all orders that have received results. Select the + next to an order to see its partial and final results in the Results grid. The most recent result is at the top. Each new partial result includes the information from the earlier ones, so you usually only need to review the latest entry. Each result has HTML and/or PDF attachments you can open.

## Assign an Unsolicited Result to a Client

Unsolicited results are orders created outside NextStep. They show the available name information in the **Client** column in this format: [F=John, M=L, L=Smith].

To assign the order to a NextStep client, highlight the placeholder value and type the client's name. Select the correct client from the list.




**Note:** You need the permission to assign unassigned lab results. Your EHR administrator sets it.

## Mark Results as Reviewed

1. Select the **+** next to the order.
2. Open the PDF or HTML link for the latest result and review it.
3. Select **Add comment** to open the Review Results form.
4. Enter your comments and make sure the **Reviewed** checkbox is selected.
5. Select **Update**.

By default, adding a comment marks the result as reviewed. To leave the result unreviewed, clear the **Reviewed** checkbox before you select **Update**.

## Use Lab Results Reminders

If you have the appropriate permissions, the **Unreviewed Lab Results** section of the Reminders page lists unreviewed and unassigned results. Select the client's name or case number to open the result for review. You can keep the Reminders page open while you work on results.

The Reminders page shows only results for orders you created or for which you were the ordering provider. To see results for other clients, open the Lab Results page directly.

If there are unsolicited results, they appear as a single line item with **Client** and **Case #** marked as Unassigned. Selecting **Unassigned** opens the Lab Results page filtered to all unassigned results.

## Find Results in the Document Center

Current and historical lab results are also available in the Document Center.

1. Select **Main Menu > Reports > Document Center**
2. Select a client if one is not already active.
3. Select a case and select **Open Case**.
4. In the Lab Results section, select **Lab Results**, then select **Open Form**.

The Lab Results page opens with the client selected and the date range set to match the case. You can change the date range once the page is open.

## Recommendations

- Assign a staff member to check the Lab Results page regularly with **Unassigned Only** selected, so all unsolicited results are assigned and reviewed. Also review all unreviewed results regularly to keep documentation accurate.

## Related Articles

- Set Up the Clinical Exchange Lab Interface