Set Up the Clinical Exchange Lab Interface

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Set up Clinical Exchange and NextStep so your agency can send lab orders and receive results.

About

NextStep provides an interface to Clinical Exchange (CE) that lets your agency electronically send lab orders to, and receive lab results from, more than 500 lab companies, including LabCorp and Quest. To get your agency connected to Clinical Exchange, email NextStep Support at support@NextStepEHR.com. Once you are connected, follow the steps below to set up labs and start sending orders. For how staff send orders and review results, see Send Lab Orders and Review Results in Clinical Exchange

This article is for EHR administrators. It covers the work you do in the Clinical Exchange portal and in NextStep:

- Clinical Exchange setup
- NextStep setup in **Main Menu > Administration > System Setup (Supplemental)**

Set Up Clinical Exchange

The Clinical Exchange portal is where you set up Clinical Exchange and search the clients and labs you have entered.

Add Test Groups

Test Groups are imported into NextStep so you can use them in lab templates.

1. Open the Clinical Exchange portal.
2. Select **Admin > Tests > Test Group Management**
3. Select **Create New**.
4. Enter a **Name** and a **Description**, and select a **Lab**. If you have only one lab, the Lab is set to that lab.
5. In the **Add Tests to Group** section, select the search button .
6. Enter a test ID or description and select **Search**.
7. Select the tests you want and select **Use Selected**.
8. Select **Save**.

The test group is imported into NextStep the next time you select **Sync Lab Information**.

Add Providers

Add providers and their NPIs so users can assign a provider in an order and have it sent in the CE lab order. This is normally set up for you when you first integrate with NextStep. To add new providers, contact NextStep Support, who work with CE to add them.

Set Up NextStep

In NextStep, set up the following sections in **Main Menu > Administration > System Setup (Supplemental)**

Clinical Exchange Labs Setup: Sync Lab Information

Select **Sync Lab Information** to synchronize information between Clinical Exchange and NextStep.

Select it any time you add or change this information in CE, to copy it into NextStep:

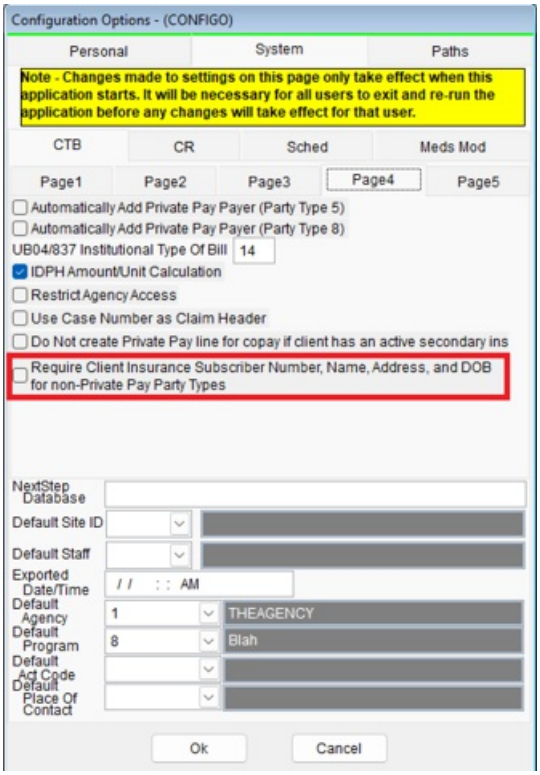
- **Labs:** You are unlikely to add a new lab such as Quest or LabCorp, but you can synchronize the list of available labs.
- **Test Groups:** Test Groups are copied from CE to NextStep and appear in the**Test Group** column of lab templates and lab orders.

Select it any time you change this information in NextStep, to copy it to CE:

- **Insurance Payers** in NextStep Billing.

An insurance payer that does not have an Insurance Name, Address, City, State, and Zip is not sent to CE. If a client uses one of these insurances, CE does not accept it when a user enters an order for that client, and the user must enter the insurance in CE by hand. Review all your insurance payers in NextStep Billing to make sure these fields are complete. If any insurances have missing information, an error message identifies them when you run a sync.

You can also turn on an option that requires certain information in client insurances. We recommend turning it on so the data is complete for CE.



Bill Type Income Levels

The Clinical Exchange Bill Type shows whether the client's insurance covers the lab, the client is paying (self pay), or the agency covers the cost. The Bill Type Income Levels table, together with the **Family Size** and **Monthly Income** fields on the Face Sheet, determines the Bill Type. Use the table to enter the family size and income levels your state defines.

CE sets the Bill Type like this:

- **3rd Party** if the NextStep client has insurance, including Medicaid.

- **Client** (which means the agency, from CE's point of view) if the client has no insurance and their income is below the income levels in the table.
- **Patient** if the client has no insurance and their income is above the income levels in the table.

Face Sheet Fields

Create two fields on the Face Sheet and give them these aliases:

Field	Alias
Family size	CE_Family_Size
Monthly income	CE_Monthly_Income_Level

If these fields are already on your Face Sheet, add the aliases to them, even if they already have other aliases.

User Roles

Assign these permissions to user roles. You can also set or override them in User Maintenance.

Section	Permission	What it allows
Orders and Order Sets	Send labs to Clinical Exchange	The user can send CE orders.
Orders and Order Sets	Requires Test Group to send lab to Clinical Exchange	The user must enter a test group (if it is blank) on an order before sending it to CE. NextStep cannot control what a user chooses once CE is open, so a user can still choose a different test.
Orders and Order Sets	View an existing Lab in CE	After an order is validated in CE, the user sees a link on the test order name in the Orders widget. Selecting the link opens the order in CE.
Orders and Order Sets	Assign unassigned Lab Results	The user can assign an unassigned (unsolicited) lab order to a NextStep client on the Lab Results page.
Orders and Order Sets	Edit Reviewed checkbox and Comment on Lab Results	The user can comment on a lab result and mark it as reviewed.
Admin Tools	Clinical Exchange Portal	Gives admin access to CE so users can add Test Groups.
Treatment Planning	Lab Results	Gives access to the Lab Results page in NextStep.

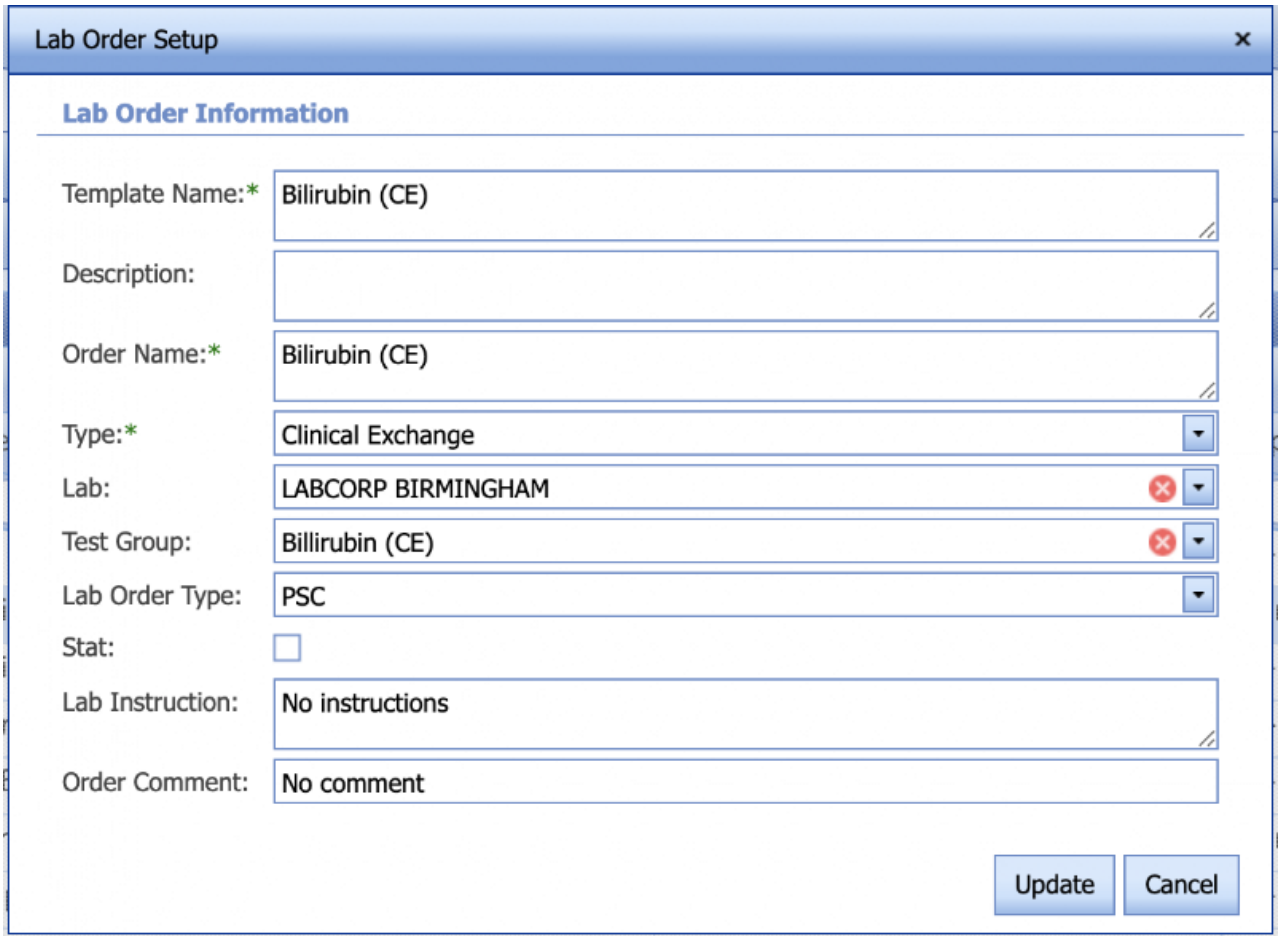
Reminders

In the Reminders section, select the **Visible** checkbox for **Unreviewed Lab Results** to show that section of the Reminders page to users.

Order Setup: Lab Templates

Create the lab templates that are sent to Clinical Exchange.

1. In Order Setup, turn on **Enable Orders and Orders Sets**.
2. Select **Order Templates**, then under **Lab Order Templates** select **New**.
3. Set **Type** to **Clinical Exchange**. More fields appear.
4. Set **Lab**. It defaults to the first lab, alphabetically, that is available in CE.
5. Set **Test Group**. You can leave it blank, but we recommend that you set it. Choose a Lab first, or the Test Group list stays empty.



6. Set **PSC** if needed. If you set it in the template, users cannot edit it in an order. If the order is PSC, NextStep sends CE an Expected Date of today's date.
7. Set **Lab Instruction** if needed. If you set it in the template, users cannot edit it in an order. The value is sent to CE in the Instructions field of the Instructions/Comments section.

Note: If a lab template uses a Test Group that is no longer in CE (and synchronized to NextStep), the Test Group is blank when a user selects the template in an order, and the user can choose a Test Group from the list.

Related Articles

- Send Lab Orders and Review Results in Clinical Exchange