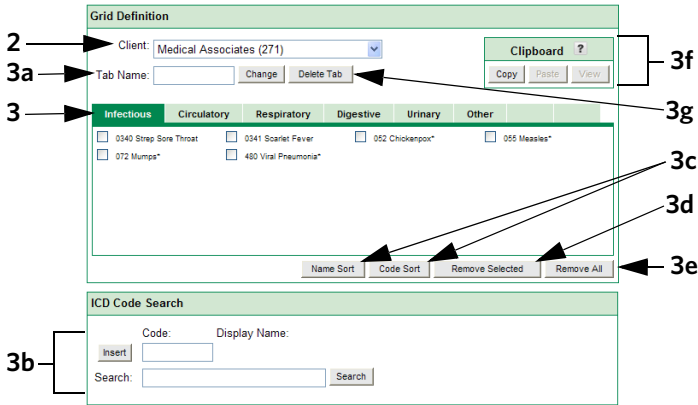


## Lab Orders Setup

### Customizing the Diagnosis Code Grid



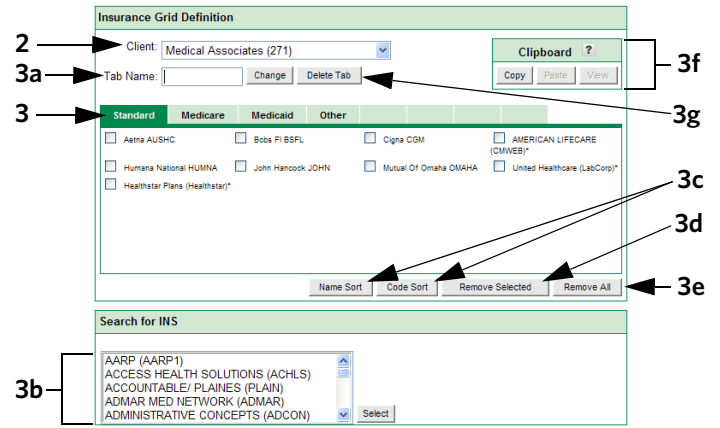
1. Click the *Lab Orders* tab, and then click *Setup > ICD Grid*.
 

**Note:** You can also customize your diagnosis code grid during order entry. For more information, refer to the online help or user manual.
2. At *Client*, click the client whose diagnosis code grid you want to customize, or click *All Clients* to customize the grid for all clients that you can access.
 

**Note:** Clicking *All Clients* overrides any client-specific grids.
3. Click the tab that you want to customize, and do one or more of the following:
  - a. **Add or modify the tab name.** At *Tab Name*, type a name for the tab, and then click *Change*.
  - b. **Add a code.** At *Code*, type the complete diagnosis code and then click *Insert*.  
Alternatively, type a portion of the code or diagnosis name at *Search*, and click *Search*. In the search results, click the code that you want to add to the grid.
  - c. **Sort the codes.** Click *Name Sort* to sort all of the diagnosis codes alphabetically by name, or click *Code Sort* to sort them numerically by code.
  - d. **Remove a code.** In the grid, select the check box next to the code that you want to remove, and then click *Remove Selected*.
  - e. **Remove all of the codes.** Click *Remove All*.
  - f. **Copy the tab.** In the *Clipboard* area, click *Copy*. To view the contents of the clipboard, click *View*. Then click the tab where you want to paste the copied tab, and click *Paste*. (You can change the client before you paste.)  
If you paste onto an existing tab, the tab retains its original name and codes, and all of the codes on the copied tab are added to that tab. (If the existing tab and copied tab have any codes in common, those codes are not duplicated.)
  - g. **Delete a tab and its associated codes.** Click *Delete Tab*.

4. If a confirmation message appears when you click *Remove All* or *Delete Tab*, click *OK*.  
To prevent this message from appearing again, select *Do not ask me next time* before you click *OK*. You can re-enable these messages via your user profile.

### Customizing the Insurance Grid

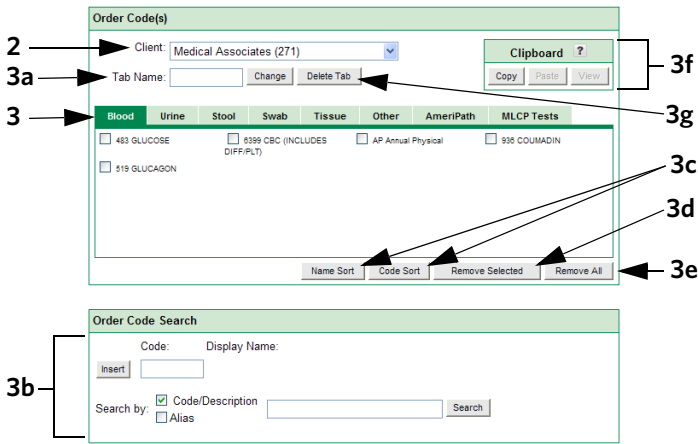


1. Click the *Lab Orders* tab, and then click *Setup > Insurance Grid*.
 

**Note:** You can also customize your insurance grid during order entry. For more information, refer to the online help or user manual.
2. At *Client*, click the client whose insurance grid you want to customize, or click *All Clients* to customize the grid for all clients that you can access.
 

**Note:** Clicking *All Clients* overrides any client-specific grids.
3. Click the tab that you want to customize and do one or more of the following:
  - a. **Add or modify the tab name.** At *Tab Name*, type a name for the tab, and then click *Change*.
  - b. **Add a carrier.** At *Search for INS*, type the first letter of the carrier's name, click the appropriate carrier in the list, and then click *Select*.
  - c. **Sort the carriers.** Click *Name Sort* to sort all of the carriers alphabetically by their full name, or click *Code Sort* to sort them by their mnemonic name. (If you click *Code Sort*, generic carriers appear at the end of the list.)
  - d. **Remove a carrier.** In the grid, select the check box next to the carrier that you want to remove, and then click *Remove Selected*.
  - e. **Remove all of the carriers.** Click *Remove All*.
  - f. **Copy the tab.** In the *Clipboard* area, click *Copy*. To view the contents of the clipboard, click *View*. Then click the tab where you want to paste the copied tab, and click *Paste*. (You can change the client before you paste.)  
If you paste onto an existing tab, the tab retains its original name and carriers, and all of the carriers on the copied tab are added to that tab. (If the existing tab and copied tab have any carriers in common, those carriers are not duplicated.)  
**Note:** If you copy a tab that has client-specific carriers to a client that does not support them, those carriers are not pasted.
  - g. **Delete a tab and its associated carriers.** Click *Delete Tab*.
4. If a confirmation message appears when you click *Remove All* or *Delete Tab*, click *OK*.  
To prevent this message from appearing again, select *Do not ask me next time* before you click *OK*. You can re-enable these messages via your user profile.

## Customizing the Order Code Grid



1. Click the *Lab Orders* tab, and then click *Setup > Order Grid*.

**Note:** You can also customize your order code grid during order entry. For more information, refer to the online help or user manual.

2. At *Client*, click the client whose order code grid you want to customize, or click *All Clients* to customize the grid for all clients that you can access.

**Note:** Clicking *All Clients* overrides any client-specific grids.

3. Click the tab that you want to customize and do one or more of the following:

- a. **Add or modify the tab name.** At *Tab Name*, type a name for the tab, and then click *Change*.

- b. **Add a code.** At *Code*, type the complete order code and then click *Insert*.

Alternatively, select *Code/Description* or *Alias* (or both), type a portion of the order code number, test name, or alias in the box, and click *Search*. In the search results, click the code that you want to add to the grid.

**Note:** If the lab does not support searching by aliases, only handwritten order translations are included in the search results.

- c. **Sort the codes.** Click *Name Sort* to sort all of the order codes alphabetically by test name, or click *Code Sort* to sort them numerically by order code number.

**Note:** If you click *Code Sort*, the numerical order codes are sorted first by length (for example, 234 comes before 1234). Order codes that start with a letter are sorted alphabetically after the numerical codes.

- d. **Remove a code.** In the grid, select the check box next to the code that you want to remove, and then click *Remove Selected*.

- e. **Remove all of the codes.** Click *Remove All*.

- f. **Copy the tab.** In the *Clipboard* area, click *Copy*. To view the contents of the clipboard, click *View*. Then click the tab where you want to paste the copied tab, and click *Paste*. (You can change the client before you paste.)

If you paste onto an existing tab, the tab retains its original name and codes, and all of the codes on the copied tab are added to that tab. (If the existing tab and copied tab have any codes in common, those codes are not duplicated.)

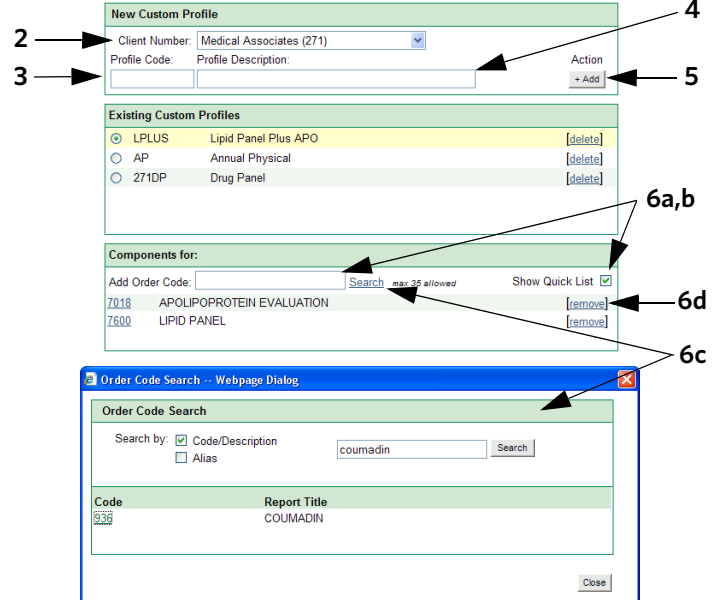
**Note:** If you copy a tab that has client-specific order codes to a client that does not support those codes, those codes are not pasted.

- g. **Delete a tab and its associated codes.** Click *Delete Tab*.

4. If a confirmation message appears when you click *Remove All* or *Delete Tab*, click *OK*.

To prevent this message from appearing again, select *Do not ask me next time* before you click *OK*. You can re-enable these messages via your user profile.

## Adding a Custom Profile



1. Click the *Lab Orders* tab, and then click *Setup > Custom Profile Definition*.
2. At *Client Number*, click the client for which you want to add a custom profile.
3. At *Profile Code*, type the code to use to identify this profile.
4. At *Profile Description*, type a description for this profile.
5. Click *Add*.

The new profile appears in the *Existing Custom Profiles* area.

6. Do one or more of the following:
  - a. Select *Show Quick List*, type the first three characters of the order code at *Add Order Code*, and then click the appropriate code in the list.
  - b. Clear *Show Quick List*, type the complete order code at *Add Order Code*, and then press Enter.
  - c. Click the *Search* link, select *Code/Description* or *Alias* (or both), type a portion of the order code number, test name, or alias, and click *Search*. In the search results, click the code that you want to add to the profile.

**Note:** If the lab does not support searching by aliases, only handwritten order translations are included in the search results.
  - d. To remove a code from the profile, click the *remove* link.
7. Repeat step 6 until the profile contains all of the appropriate order codes (up to 15 or 35, depending on what the lab supports).

For help, contact the Help Desk at 1-800-697-9302.