

## Practice Policy & Guidelines

Policy: Tests: Ordering, Tracking and Reporting	Developed by:	Approved by:
Updated:	Signature:	Signature:

### **PURPOSE:**

Assure timely information and results from tests ordered by the physician are available to the physician and the patient.

### **SCOPE:**

Includes laboratory tests, imaging tests and other tests ordered by the physician in the practice.

### **RESPONSIBILITY:**

- The physician will determine the tests to be ordered and will order them.
- The office staff will do the ordered tests or schedule the test at the appropriate facility at the convenience of the patient and in a coordinated fashion.
- The office staff will track the occurrence and reporting of the results.
- The nurse or medical assistant will review the test results according to the protocol.
- The physician or nurse practitioner will review all test results or abnormal test results.
- The physician, nurse practitioner, nurse, or medical assistant will report all normal test results either by phone call or letter.
- The physician, nurse practitioner or care coordinator nurse will report all abnormal results, determined by the physician or nurse practitioner. Results will be given by phone call or letter.

### **POLICY:**

1. The tests will be ordered through the electronic health record (EHR) for laboratory, imaging or other diagnostic tests. Lab and x-ray requisitions will be provided to the family for tests to be done at (insert facility). For tests done in the practice (hemoglobin, lead screen, urinalysis, urine culture, rapid strep and throat cultures), the following steps should be followed:
  - a. The test will be ordered by the physician or nurse practitioner and flagged as a "visit task."
  - b. The nurse or medical assistant will perform the laboratory tests and run the results.
  - c. The test results will be put directly into the EHR as a "visit task results."
  - d. The physician or nurse practitioner will review the results.

- e. If the test is normal, the results will be given by physician or nurse practitioner prior to the patient leaving their appointment. Patients should be encouraged to stay and await the results. If the patient has left, the family will be called within **one** business day with normal result.
  - f. If the test results are abnormal, the physician will review the results with the patient. If the patient has left (for example urine culture and throat culture results), the physician, nurse practitioner or phone nurse will call the patient at home within **one** business day to review the abnormal results and treatment plan.
  - g. The reporting of the test results and any further action to be taken will be documented in the medical record by the physician, nurse practitioner or phone nurse.
2. For tests ordered at another facility, the following steps should be followed:
- a. The tests will be ordered by the physician through the EHR and flagged as a “visit task.”
  - b. The test will be scheduled at the convenience of the patient phone nurse or care coordinator. It will be coordinated with other tests at the same facility if possible.
  - c. The requisition will be faxed to the facility, sent electronically to the facility or given to the patient depending on the test and facility providing the test.
  - d. The patient will be given the necessary documentation and any instructions to prepare for the test.
  - e. The test will be logged in the EHR by the ordering physician or nurse practitioner.
  - f. The test results that are received will be scanned into the medical record daily.
  - g. A medical assistant will review the visit tasks in the EHR to identify overdue test results on a weekly basis. The phone nurse or care coordinator will review the (insert hospital name) EHR or call the facility who is providing the test to see if the test was done and to ask for the test results.
    - i. If the test is done, the results will be requested. The results may arrive electronically or scanned in the medical record.
    - ii. If the test was re-scheduled by the patient, the EHR will be updated.
    - iii. If the test was cancelled or the patient did not show up for the appointment, the patient will be contacted by telephone or by mail depending on the urgency of the testing and will be instructed to call the office to make another appointment. The letter or call will be documented in the medical record.
  - h. The test results are reviewed by nurse, nurse practitioner or physician.
  - i. If the test results are normal, the physician will “task” the phone nurse to call the patient with normal results.
  - j. If the test is abnormal, the nurse will give the results to the physician or nurse practitioner for review. The physician or nurse practitioner will call the patient to review the results with the patient. The call will be documented in the medical record.

**This policy shall be reviewed at least every 2 years.**

Approved Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

**APPROVALS:**

Physician Partner: \_\_\_\_\_

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Administrative Partner: \_\_\_\_\_

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

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