THE NEW PATH FOR PATH LABS

pathx
Laboratory Information System™
At PathX, we fully understand that your lab is focused on more than just patient reports and information processing. For most pathology labs, primary concerns include responsible delivery of care, effective use of resources, wise business management and maximizing the value derived from technological investments. You will quickly learn that we created PathX with all of this in mind.

PathX was developed in 2004 by Physicians Independent Management Services® (PIMS) — a full-service medical billing and practice management services company. We recognized that pathology labs needed LIS services that went far beyond what most software companies could provide. So, we developed PathX with the guidance and active participation of pathologists, medical professionals and software engineers.

Our goal was to create a powerful and innovative pathology software package designed to increase speed and accuracy by automating workflow requirements, creating efficiencies where other systems failed. PathX offers so many options for customization that it may seem as if it was created just for you and the intricacies of your lab.

I encourage you to find out more about the most powerful new tool set for anatomic pathology and chart a new path to success, with PathX.

Keith Pautler, M.D.
President,
Physicians Independent Management Services, Inc.
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QUICK START: TYPICAL WORK FLOW

The Case Module tab is the default screen when PathX launches.

- Select **New** to begin creation of a new Case. The **New Case** screen will open.

- Select the **Report Type** and **Sub Report Type** from the dropdown menus.

- Insert the **Collected Date** (required).

- Add **Patient Demographic** data as known. The SSN is not required, but other data will populate if the Patient is already in the database.

- Fill out **Client, Referring Physician**, and **Gross** information, if known.

- Enter an **Accession** value and click “Save”. If the value entered is already in use, the next available value will be suggested.

- Select “**Create**” to add Specimens to the case, which will open the Specimens screen.

- Add basic **Specimen** data for each specimen in the case. A **CPT Code** may be added, for the **Specimen Type & Subtype**.

- Select “**Save**” to save the data entered; this will open the **Case Screen**.

- To order **Tests** for Specimens, select Tests & Order New Tests from the Case screen, which opens the **Order Tests** screen. **Insurance information** may be entered at this point, using the **Patients Module**.

- To enter **Test Results**, select Tests & View Test Reports from the Case screen or use the Additional Test Utility.

- After a case is assigned to a pathologist, slide labels and accession labels may be printed using the **Utilities Module**.

- Slides can be tracked via the **Slides Distribution** and **Slides Log** Utilities.

- If the Gross and Diagnosis are transcribed, the **Transcriptionist block** should be updated on the Case Screen.

- When the case is ready for the pathologist sign out, select **Case Status & Send to Physician**.

- The case will enter the Pathologist’s queue for **Sign Out**, which can be done from the **Remote Module**.
Within the PathX Laboratory Information System, patient demographic and insurance information is managed inside of the Patient Module. The Patient Module has been designed to allow for quick access to add new patients as well as search and edit exiting patients.

The Patients Module serves two primary functions:

- **Addition of New Patients** – Patients are uniquely identified in PathX by social security number. Once a new social security number is entered, the patient address, phone number, and insurance information can be entered. Responsible party and insurance information may also be entered in this module.

- **Search & Edit Existing Patients** – By selecting the Search & Edit function within the patient module, a list of all patients entered into the LIS is displayed to allow for quick access to view and edit a particular patient’s demographics.

**What if a patient does not provide the correct social security number?**

There are times when a patient cannot, or will not provide a social security number. Some patients may not even have one yet. In this situation, the patient’s last name, first name and/or date of birth needs to be entered into the system to allow for patient tracking.
Creating New Patient Workflow:

1. Enter the patient's personal information into **Demographics** tab.
2. All patients are automatically entered as “Self” in **Responsible Party** Tab. If the patient is a minor or is the responsibility of another individual, enter the guarantor’s demographic information.
3. Enter patient’s insurance information; if the insurance does not appear in the combo list, click on **Add** button located beside the list, and add the necessary insurance provider information. If the patient has more than one insurance policy/provider, press the **Add Insurance** button located on the top toolbar.
4. Select the **Save** button before closing to save information entered.
Demographic Tab—Last name, first name, birth date, sex and address must be entered. Enter additional information, if known.

Responsible Party Tab—If the responsible party is a party other than the patient, the guarantor’s last name, first name, birth date, social security number and address must be entered. Enter additional information, if known.

Insurance Tab—The patient Insurance Tab stores all insurance providers for a patient. Double click the current provider in the active section. The provider’s information will be displayed in the window below. De-selecting the active checkbox and updating will move the insurance provider to the history section, if a provider is no longer valid.

History Tab—Within the History Tab, the current case and all prior cases related to the patient can be viewed.

Notes Tab—The Notes Tab displays additional "as needed" information related to the patient.
Searching Existing Patients:

In the Search Criteria section, there are many options to search for a specific patient. Searches may be done by social security number (SSN), last name, first name or date of birth (DOB) on the main segment. Also, it can be done by creation date, phone number, or address on the Additional Filter tab.

Main Search Criteria

- **SSN** – Enter the entire social security number.
- **Last Name** – Enter the entire last name or a few characters to bring all the matches.
- **First Name** - Enter the entire first name or a few characters to bring all the matches.
- **Birth Date** – Enter the exact date in MM/DD/YY format, specific year and month, or a date range.
Additional Search Criteria:

- **Creation date** - Enter the exact date, specific year and month, or a date range.
- **Phone Number** – Enter the entire patient phone number.
- **City** – Enter the entire city or a few characters to bring up all the matches.
- **State** – Enter the entire state or a few characters to bring up all the matches.
- **Zip Code** – Enter the entire zip code.
Editing Patient Information:

Users are able to edit patient information by selecting the Edit button which is located to the left of the Patient’s First Name.

- To edit patient information click on the Edit button next to the patient’s name and the Patient Screen will display.
- Once the necessary edits have been completed, select the Save button located in the top toolbar.
EDITING EXISTING PATIENTS

What happens if I enter the same patient on two different cases?
When a new patient case is created, a unique numeric ID that the system uses to locate patient specific information (basic information such as SSN, birth date, name, sex, etc.) will be generated. If a user creates a case and enters a social security number of a previous patient, PathX will autocomplete the patient data in the remainder of the fields. This information can be changed and saved to the patient’s newly generated numeric ID before a case is signed out. If this same patient is entered on another case in the system, a different numeric ID will be generated for the second case, in order to maintain separate patients’ demographics information (e.g. it is possible that there are two different patients with the same name and birth date). Any changes to the information of the patient on the first case will not change the patient on the second case since the cases have different ID number.

How does this affect other cases?
It means that even if the user changes the name, SSN, or date of birth of the patient, only that specific patient information, on that specific case, will change; this will not affect the other cases the same patient may have in the system. This is due to the fact that each patient receives a unique ID for each occurrence in the system.

Can PathX help avoid or fix this situation?
A new patient (or a different patient in the system) must always be “assigned” to the case. PathX has a validation system in place to alert users during accessioning if a patient has been entered in a previous case within the last 24 hours during accessioning.
DID YOU KNOW?

- PathX first went live in Q1 of 2004 and has since undergone five version upgrades and countless updates at the request of countless pathologists laboratory users.

- PathX is capable of handling up to 10,000 accessions per day.

- PathX Billing Module offers turn key medical billing services which can be completed in-house, or by Physicians Independent Management Services, Inc. (for more information, please visit www.pims-inc.com).

- PathX implementation specialists can complete a process-driven approach to ensure advanced
pathx Laboratory Information System™

CAS flip CASES MODULE
Within the PathX Laboratory Information System, the Case Module has been designed to offer users one portal where new, open and closed cases can be accessed. The primary functions of the Case Module is to collect and maintain all data relevant to patient cases.

**New Case** – For newly assigned cases, the New Case Toolset manages the process of case accessioning and recording of corresponding data.

**Open Existing Case** – Cases which have already been recorded in the system can be viewed in list format by accessing the toolset. If relevant case data is known, the end user can expedite the process by using the Quick Search function and entering any of the following: Accession Number, Last Name, SS# or DOB of a patient. To display all cases assigned to a pathologist, select Pathologist and enter pathologist’s last name only.

**Closed Cases** – The viewing of cases which have been previously been closed is accomplished through this function, either by browsing cases in list format, or by searching.
The **New** Case command within the **Cases Module** offers users the ability to create a new case record within the system. Upon accessing the toolset, a **New Case Screen** will appear and all relevant case information can be entered. After all data deemed necessary has been entered, clicking the **Save** button will assign the next available accession number, and record the case within the PathX LIS system.

**Note:** After a case has been saved within PathX, an **Update** button will appear allowing for future edits to be saved, and a **Create** button will appear that will allow the user to access the Specimen toolset. Once the specimen(s) are entered, the Create button will revert to **View**.
Within the Creating New Case and Case Currently Open For Editing Screens, users have several tools at their fingertips. This section will outline each of the features found within file menu toolbar.

1. **File:**
   - **Save/Update** – Saves all changes made to the case.
   - **Print Preview** – For open cases, a system generated print preview will display. Closed cases will display a PDF file.
   - **Print** – Displays the print dialog box to print case.
   - **Gross Preview** – Displays a preview of gross report.
   - **Gross Print** – Displays the print dialog box to print case with history correlation and/or stat fields.
   - **Slide Labels** – Allows printing slide labels for an individual case and batch for multiple accessions, including slides for additional tests. Blank labels may be printed.
   - **Generate PDF** – Displays the Pathology Report in PDF format which may be saved.
   - **Fax Report** – Sends copy of the final report via Fax.
2. Physician:
   - **Referring** – Displays the Referring Physician Maintenance Screen where authorized users can add or edit the referring physician.
   - **Requesting** – Displays the Requesting Physician Maintenance Screen where the requesting physician can be added or edited by authorized users.

3. Case Status:
   - **Send To Physician** – Sends cases to Physician for sign out.
   - **Take From Physician** – Retrieves case from Physician.
   - **Manual Sign-out** – Allows technical only cases to be signed-out.
   - **Supplemental Report** – Creates a supplemental report on a closed case. Opens case for editing and changes final report to supplemental report. The reason for the report must be entered.
   - **Corrected Report** – Closed case option to generate corrected report. Opens case for editing and changes final report to corrected report. The reason for the report must be entered.
   - **Internal Correction** – Closed case option to open case for editing without changing final report to corrected report. The reason for the report must be entered.
   - **Undo Supplemental Report** – Undo open supplemental report and return case to open.
   - **Undo Corrected Report** – Undo open corrected report and return case to close.
   - **View/Edit Case Reports** – PathX maintains a log of case workflow and reports created per case.

4. Incidents:
   - **Create New** – Allows addition of new of incidents to cases. Required information includes incident type, name of individual reporting incident, and statement of facts.
NAVIGATING THE CASE FILE MENU

4. Incidents (continued)
   - **View All** – Opens Browse Incidents screen to view incidents from a case or all existing incidents. May search by client, status, incident type, and/or creation date range. Incident reports may be printed.

5. Tests:
   - **Order New Test** – Order new tests on a case.
   - **View All** – View entire list of tests ordered for a case.
   - **View Test Reports** – View and complete breast prognostics and SISH tests (if ordered).

6. Logs:
   - **Audit Log** – Allows audit all of events from the case by user name and date.
   - **Notes Log** – Maintains log of issues reported by client and actions taken (by case and date).
   - **Report Distribution Log** – Maintains log of report delivery to clients via e-mail, remote print, fax, courier, and/or web.
   - **Slides Distribution Log** – Maintains log of slide location (internally and/or offsite).

7. Tools:
   - **Manage Images** – View all images from a case. Can filter images by type or show all images.
   - **SPO Conversion** – Creates Consult and Read Only cases by previous slide prep ordered.
   - **Shortcut List** – Opens list of the shortcut/hot keys within PathX.
ENTERING NEW SPECIMEN DATA

Within the Case Currently Open For Editing Screen, users have the ability to add new specimens for any case via the Create Button located in the bottom right corner of the screen.

Auto-Populating Fields: Certain fields will be auto-populated based on information found within other fields on the page. The CPT Code field can be set to a value based on the organ type and Procedure fields. This relationship can be edited via the Maintenance screen for Specimen Sub Type. If enabled for the Report Type, the Summary Diagnosis will be auto-populated based on the text in the Diagnosis field. The list of Summary Diagnoses for each Report Type can be edited via the Maintenance Screen for Summary Diagnosis. An ICD9 code will automatically be associated with the case if a Summary Diagnosis is set. The auto-populated Summary Diagnosis can be edited or deleted via the pull-down tab. The associated ICD-9 codes for the case can be viewed from the main Edit Case screen.

Other Features on the Specimen Screen: The Specimens Screen further allows for the assignment of digital imaging, as well as ordering additional frozen sections.

- **Capture Image** – Allows for specimen imagery to be assigned to the case.
- **Lab Work** – Enables the detail of frozen section(s) and/or the ability to add additional frozen sections.
To order tests for existing Specimens, the end user can simply select Order New Tests from the Tests drop down menu. The New Test Order Screen will appear showcasing the list of available tests; previously ordered tests for the case will be shown in red. While multiple tests can be ordered, the Specimen and Block(s) must be selected for the Test(s) to be performed.
Selecting the ICD-9 button within the Cases Screen will open the ICD-9 Codes Information screen, as seen above. The ICD-9 Toolset allows users the ability to input all coding associated with the testing performed on each specimen. The typical workflow process for applying ICD-9 Codes is as follows:

1. Begin by pressing the “Click here to add a new record…” to add a new ICD-9 Code.
2. Within the new record, select the Specimen Number associated with the ICD-9 Code to be applied.
3. For each specimen assigned to the case, users are required to either Assign a ICD-9 Code manually, or select the ICD-9 Code from the Drop Down List of Summary Diagnosis.
4. For each ICD-9 Code assigned to the case, user must assign the appropriate ICD9 Type by selecting either Clinical or Diagnosis from the drop down menu.
5. All users are required to designate a Primary Diagnosis to the appropriate ICD-9 Code. For each accession within the system, PathX has been designed to allow for only one Primary Diagnosis to be applied.
6. In the event a user wishes to delete a specimen, select and highlight the appropriate row and press the Delete button.
Selecting the **CPT Codes** button within the **Cases** Screen will open the **CPT Coding** screen, as seen above. The CPT Codes & Billing Information Toolset allows users the ability to input all coding and billing data needed to successfully bill charges associated with each specimen. The typical workflow process for applying CPT Codes is as follows:

1. Begin by pressing the **“Click here to add a new record…”** to add a new CPT Code.

2. Within the new record, select the specimen number associated with the CPT Code to be applied.

3. For each specimen assigned to the case, users can either manually assign the appropriate CPT Code(s) or select from the list of CPT Codes within the Drop Down Menu.

4. When required, each CPT Code assigned to the case can have a **Modifier** applied to ensure the successful billing of the associated fee.

5. For each CPT Code, users are required to record the number of **Units** completed.

6. The **Fee Amount** for each CPT Code will be automatically populated based on the **Vendor**, **Fee Type**, and **Bill By** selections.
To create a new incident within PathX, simply select Create New from the Incidents drop down menu. After the selection has been made, the Incident Screen will appear and the ability to enter detail regarding the event can be recorded. Case information is automatically populated, as well as the user whom recorded the incident. Previously recorded Incidents can be reviewed and/or edited by selecting View All from the Incidents drop down menu. Upon accessing the Browse Incidents Screen, to edit an incident, select View next to the desired Accession Number and edit accordingly.
The **Quick Search** option locates a specific case by entering any one of the following: accession number, patient name, patient SSN, pathologist, patient date of birth, and/or chart number.
VIEWING/EDITING CURRENTLY OPEN CASES

Once an end user has located a desired case that had previously been left open, and selects View, the Case Currently Open For Editing Screen will appear allowing for changes to be made to relevant case data. In an effort to properly control cases, the Accession Number, Report Type and Subtype may not be modified if populated utilizing an Accession Wheel. All fields other than those deemed necessary to control the case, may be modified before the case is signed out. A detailed listing of all Reports and Subtype Reports can be found within Chapter 4, Section 15.

The Case Currently Open For Editing Screen also allows for a case to be designated as STAT, Follow up, Client Callback, and/or Error Log.

- **STAT** – Establishes a STAT subsection under the Special Instructions header of the internal gross reports, along with the requesting physician and phone number.
- **Follow up** – Enables a case for follow up tracking.
- **Callback** – Offers the ability for a case to contain callback information.
- **Error Log** – Prohibits a case from being signed out if selected.
Within the **Case Currently Open For Editing** Screen, users have the ability to view and/or edit the specimen(s) that have been assigned to the case by selecting **View**. The **Specimens** Screen will then detail each of the following: Organ Type, Description of Specimen, Procedure Performed and CPT Code(s) completed. The **Specimens** Screen will also provide detail in the form of Gross Description, Microscopic Description and Diagnosis; however, the aforementioned fields are subject to change dependent upon the Report Sub Type.

The **Gross Description**, **Microscopic Description** and **Diagnosis** use an MS Word editor, therefore typical Word features are available. The AutoCorrects buttons allows assignment of user-level macros for commonly used phrases.
Upon accessing the **Tests** Screen, users can Print, Cancel, Re-Open, or mark tests as “VRB” (Verbally Read Back to the Pathologist). Tests previously ordered on specimens can be viewed by selecting **View All** from the **Tests** drop down menu.
Within the PathX Laboratory Information System, The Maintenance Module allows authorized users to enter and modify system parameters relating to Users, Physicians, Clients, Specimens, and other case specific criteria. The Maintenance Module has twenty-two main functions, some of which may have restricted access.

1. Users
Enter/Edit Users and designate appropriate access permissions.

2. Diagnosis Location
A listing of all diagnosis locations within the system.

3. Gross Location
A listing of all gross locations within the system.

4. Owners
A listing of pathology groups within the system.

5. Referring
A listing of all referring physicians within the system.

6. Requesting
A listing of all requesting physicians within the system.

7. Pathologist Instructions
A listing of all available pathologist instructions within the system.

8. Insurance
A listing of all insurance carriers within the system.

9. Client
Allows creation or editing of new, or existing clients.
CHAPTER 3: MAINTENANCE MODULE

10. Pickup
Allows creation or editing of all client pickup methods.

11. Route
Allows creation or editing of all client delivery route methods.

12. Vendor
Allows creation or editing of all vendors.

13. Supplies
Allows creation or editing of all supplies available to clients.

14. Supply Category
Allows creation or editing of new or existing supply categories.

15. Specimen Type
Allows creation or editing of specimen types available.

16. Specimen Sub Type
Allows creation or editing of specimen sub types available.

17. Summary Diagnosis
Allows creation or editing of available standard diagnosis.

18. Tests
Allows creation or editing of all available tests

19. Incident Type
Allows creation or editing of all incident types available for use within system.

20. Correction Reasons Type
Allows creation or editing of all correction reasons available within PathX.

21. Image Type
Allows creation or editing of all image types available for use within PathX.

22. Fee Schedule
Allows editing of all pricing utilized within PathX.
ESTABLISHING A NEW USER

1. By Selecting the User Button within the Maintenance Module, the window, as seen below, appears. The User Maintenance Screen has three sections: a User Section that contains the user information, a Pathologist Section only available if the user is a pathologist, and the System Permission Section where the appropriate access is assigned to the user, depending on the user’s role. After entering all required Information, click Update to save the record.
2. By selecting the Diagnosis Location Button within the Maintenance Module, the window below appears, listing all locations in PathX.

To add a new location, click New Locations, located on the tool bar in the Location Maintenance Screen.

To save the screen information, click Save Location.

To edit a location, click Edit, located next to Location ID.

To save edits to the selected location, click Update Location.

Note: If user selects Edit, the Save Location button will display Update Location.
3. By selecting the **Gross Location** button within the Maintenance Module, the **Gross Location Maintenance** window below appears, listing all gross locations within PathX.

- To add a new Gross Location, click the **New Gross Location** located on the tool bar.
- To save the screen information, click the **Save Location**.
- To edit a location, click the **Edit**, located next to Location ID.
- To save edits to the selected location, click the **Update Location**.

Note: If user selects **Edit**, the **Save Location** button will display the **Update Location**.
4. By Selecting the Owners Button within the Maintenance Module, the Owner Maintenance window, as seen below, will appear displaying all owner information.

1. To add a new owner, click New Owner, located on the tool bar in the Owners Maintenance Screen.
2. To save the screen information, click Save Owner.
3. To edit an owner, click Edit, located next to the Owner ID.
4. To save edits to the selected owner, click Update Owner.

Note: If user selects Edit, the Save Owner button will display Update Owner.
5. By selecting the Referring Button within the Maintenance Module, the Referring Physician Maintenance window, as seen below, will appear. The Referring toolset serves two primary functions: A) Viewing Existing Referring Physicians, and B) Creating New Referring Physicians.

A) Searching Existing Referring Physicians:

The user has different options to search for a specific referring physician within the Search Criteria section. Searches may be done by physician’s last name, physician’s first name, NPI, or active status on the main segment. On the Additional Filter segment, searches can also be done by address, city, state, or zip code.

Main Search Criteria:

- Last Name – Enter entire last name or a few characters to display all potential matches.
- First Name – Enter entire first name or a few characters to display all potential matches.
- NPI – enter Physician’s National Provider Identifier Number (NPI).
- Active – User can choose from the list to display “ALL”, “ACTIVE” or “NO ACTIVE” physician(s).
B) Creating New Referring Physicians:

- To add a new referring physician, click **New Referring Physician**, located on the tool bar in the **Referring Physician Maintenance** Screen. At a minimum, user must enter first and last name.

- To edit a referring physician, click on **Edit**, located next to **Referring Physician ID**. To update the referring physician information, click on **Update Referring Physician**.
6. By Selecting the Requesting Button within the Maintenance Module, the Requesting Physicians Maintenance window, as seen below, will appear. The Requesting Toolset serves two primary functions: Search Criteria and Requesting Physician list.

Search Criteria

The user has different options to look for a specific requesting physician within the Search Criteria section. Searches may be done by physician’s last name, first name, NPI, or active status on the main segment. On the Additional Filter segment, searches can also be performed utilizing an address, city, state or zip code.

Main Search Criteria:

- Last Name – Enter entire last name or a few characters to display all potential matches.
- First Name – Enter entire first name or a few characters to display all potential matches.
- NPI – enter Physician’s National Provider Identifier Number.
- Active – User can choose from the list to display “ALL”, “ACTIVE” or “NO ACTIVE” physician(s).
MANAGING REQUESTING PHYSICIANS

Requesting Physician

- To add a new requesting physician, click **New Requesting Physician**, located on the tool bar in the **Requesting Physician Maintenance** Screen. At a minimum, user must enter first and last name. To save the screen information, click on **Save Requesting Physician**.

- To edit a requesting physician, click on **Edit**, located next to **Requesting Physician ID**. To update the requesting physician information, click **Update Requesting Physician**.

Address Filters Search Criteria:

- **Address** – Enter entire address or a few characters to display all matches.
- **City** – Enter entire city or a few characters to display all matches.
- **State** – Enter entire state or a few characters to display all matches.
- **Zip Code** – Enter entire zip code.
CREATING INSTRUCTIONS FOR PATHOLOGIST(S)

7. By selecting the Pathologist Instructions button within the Maintenance Module, the Pathologist Instructions window, as seen below, will appear. The Pathologist Instructions Toolset serves one primary function: **Adding New Instructions For Pathologists**

![Pathologist Instructions Window](image)

- To add a new pathologist instruction, click **New Pathologist Instructions**, located on the tool bar in the Pathologist Instructions Maintenance Screen.
- Enter pathologist information.
- To save the screen information, click **Save Pathologist Instructions**.
- To edit a pathologist instruction, click **Edit** button, located next to Pathologist Instructions ID.
- To update the edited pathologist instruction, click **Update Pathologist Instructions**.

**Note:** If user selects the edit option the Save Pathologist Instructions button will display Update Pathologist Instructions.
8. By selecting the Insurance Button within the Maintenance Module, the Insurance Maintenance window, as seen below, will appear. There are 3 sections on this screen: search criteria, insurance information, and insurance address information. The insurance address information is displayed by clicking on the insurance line.
MANAGING INSURANCE CARRIERS

Insurance Information

- To add a new insurance, click on New Insurance, located on the top tool bar in the Insurance Maintenance Screen.
- User must enter insurance name, and select owner name from the drop down list.
- To save the screen information, click on Save Insurance.
- To edit an insurance click on the Edit button located next to the Insurance ID.
- To update the insurance that was selected click Update Insurance.

Insurance Address Information

- To add a new insurance address, click New Insurance Address, located on the top tool bar.
- At a minimum, user must enter insurance address and zip code.
- To save the screen information, click Save Insurance Address.
- To edit an insurance address, click Edit, located next to the Insurance Address ID.
- To update the edited insurance address, click Update Insurance Address.
MANAGING INSURANCE CARRIERS

The search criteria tabs provide users with different options to search for insurance information. The user may search by patient insurance name, owner name, or active status on the main segment.

Users may also search by address, city, state or zip code under Additional Filter. Users also have the option to display the insurance address of a specific insurance according to its active status.

Main Insurance Search Criteria
- Insurance Name – Enter the entire insurance name or a few characters for a display of all potential matches.
- Owner Name – Name may be chosen from list.
- Active – User may choose from drop down box to display “ALL”, “ACTIVE” or “NO ACTIVE” insurance(s).

Insurance Address Search Criteria
- Address – Enter entire address or a few characters to display all matches.
- City – Enter entire city or a few characters to display all matches.
- State – Enter entire state or a few characters to display all matches.
- Zip Code – Enter entire zip code.
9. By Selecting the **Clients** Button within the Maintenance Module, the **Client Maintenance** window, as seen below, will appear. This screen allows for the creation of a new client or modification to an existing client. The next series of images will display each of the tabs; the information on each tab must be completed for the client to be successfully saved within PathX.
Pickup and Route Tab
This tab allows the user to select the collection location for client specimen and the delivery method(s).

Requesting Physician Tab
Requesting Physician(s) are assigned to the client using this tab.

Pathologist Preference Tab
On this tab, clients can request preferred pathologists to assign to their cases.
CREATING & EDITING CLIENTS

Other Info Tab
On this tab, miscellaneous setup information is entered for the client.

Report Configuration Tab

Report Distribution Sub Tab
In this sub tab, client result delivery method(s) are defined. Different delivery methods can be defined at the report type level, as well.
Accession and Labels Sub Tab
In this sub tab, a client can be setup with a customized accession wheel and/or customized specimen label.

Case Defaults Sub Tab
On this sub tab, special client case defaults are defined (if any).
Requisitions Tab
This tab allows the user to enter additional instructions related to a requesting physician and/or insurance company (if any).

Copy To Reports
Demographic Info Sub Tab
In this sub tab, the user can enter the demographic information for the recipient of the reports which are to be copied.
CREATING & EDITING CLIENTS

Copy To Reports

Route Sub Tab

In this sub tab, the routing instructions are defined, if the client requested for an additional location to receive a copy of results.

Copy To Reports

Report Distribution Sub Tab

In this sub tab, the report distribution methods are defined, if the client requested for an additional location to receive a copy of the results.
**CREATING & EDITING CLIENTS**

**Add Note Sub Tab**
Allows all client communications to be entered and tracked.

**Report Sub Tab**
Allows user to create a report with all notes related to a particular client.
MANAGING PICKUP ROUTES

10. By selecting the **Pickup** button within the Maintenance Module, the **Pickup Route Maintenance** window, as seen below, will appear. This screen has two primary functions: Editing existing pickup routes and establishing a new pickup route.

![Pickup Routes Maintenance Screen](image)

**Pickup Routes**

To add a new pickup route, click **New Pickup Route**, located on the tool bar in the **Pickup Route Maintenance Screen**. Enter the pickup route type and its abbreviation. To save the screen information, click **Save Pickup Route**.

To edit a pickup route, click **Edit**, located next to the **Pickup Route ID**. To update the Pickup Route selected for editing, click **Update Pickup Route**.
11. By selecting the Route Button within the Maintenance Module, the Report Routes Maintenance window, as seen below, will appear. This screen has three primary functions: A) Searching Existing Report Routes, B) Establishing a New Report Route and C) Editing An Existing Route.

A) Searching Existing Report Routes:
The user has two options to search for a route located on the Search Criteria section. These two options are route status and route type.

Main Search Criteria:
- Route Status – Users can choose from “ALL”, “ACTIVE” or “NO ACTIVE” report routes.
- Route Type – Users can enter the entire report type name or a few characters to display all potential matches.
B) Establishing A New Report Route:

- To add a new report route type, click **New Report Route Type**, located on the top tool bar.
- Enter the report route type and its abbreviation.
- To Save the screen information, click **Save Report Route Type**.

C) Editing An Existing Route:

- To edit a report route type, click **Edit**, located next to the **Report Route Type ID**.
- To Save the edited report route, click **Update Report Route Type**.
12. By Selecting the Vendor Button within the Maintenance Module, the Vendor Maintenance window, as seen below, will appear. This screen has three primary functions: A) Searching Existing Vendors, B) Establishing a New Vendor and C) Editing an Existing Vendor.

A) Searching Existing Vendors:

The user has two options to search for a vendor located in the Main Search Criteria section. These two options are vendor status and vendor name.

Main Search Criteria:

- Vendor Status – User can display “ALL”, “ACTIVE” or “NO ACTIVE” vendor(s) from the dropdown box.
- Vendor Name – Enter entire vendor name or a few characters to display all matches.
B) Establishing A New Vendor:

- To add a new vendor type, click **New Vendor**, located in the tool bar.
- Enter vendor’s name.
- To save the screen information, click **Save Vendor**.

C) Editing Existing Vendor:

- To edit a vendor, click **Edit**, located next to the **Vendor ID**.
- To save the edited vendor, click **Update Vendor**.
13. By Selecting the Supplies Button within the Maintenance Module, the Supply window, as seen below, will appear. This screen has three primary functions: A) Viewing Existing Supplies, B) Adding New Supplies and C) Editing Existing Supplies.

Once the Supply window is open the user can add new supplies or edit existing supplies by client specialty.
MANAGING LAB SUPPLY CATEGORIES

14. By Selecting the Category Supply Button within the Maintenance Module, the Category Supply window, as seen below, will appear. This screen has three primary functions: A) Viewing Existing Supply Categories, B) Adding New Supply Categories and C) Editing Existing Supply Categories.

Once the Category Supply window is open, the user can create or edit available supply categories by specialty type.
MANAGING SPECIMEN TYPES

15. By Selecting the Specimen Type Button within the Maintenance Module, the Browse Specimen Types window, as seen below, will appear. This screen has three primary functions: A) Searching Existing Specimen Types, B) Adding New Specimen Types and C) Editing Existing Specimen Types.

A) Searching Existing Specimen Types:
The user has three options to search for a specimen type: Report Type, Report Sub type and Specimen Type Name.

Main Search Criteria:
- Report Type – User must choose one type from the list.
- Report Sub Type – User must choose one type from the list.
- Specimen Type Name – User Must enter either entire specimen type name or a few characters to display all potential matches.
B) Establishing A New Specimen Type:

- To add a new specimen type, click New Specimen Type, located in the top tool bar.
- User must enter a list report type and report sub type.
- To Save the screen information, click Save Specimen Type.

C) Editing An Existing Specimen Type:

- To edit a specimen type, click Edit, located next to Specimen Type ID.
- To update the edited specimen type, click Save Specimen Type.
MANAGING SPECIMEN SUB-TYPES

16. By Selecting the Specimen Sub Type Button within the Maintenance Module, the Browse Specimen Sub Types window, as seen below, will appear. This screen has three primary functions: A) Searching Existing Specimen Sub Types, B) Adding New Specimen Sub Types and C) Editing Existing Specimen Sub Types.

A) Searching Existing Specimen Sub Types:
The user has four options to search for a specimen sub type: Report Type, Report Sub type, Specimen Type and Specimen Sub Type Name.

Main Search Criteria:
- Report Type – User must choose one type from the list.
- Report Sub Type – User must choose one type from the list.
- Specimen Type – User must choose one type from the list.
- Specimen Sub Type Name – User Must enter entire specimen sub type or a few characters to display all matches.
B) Establishing A New Specimen Sub Type:

- To add a new specimen sub type, click New Specimen Sub Type, located on the tool bar in the Browse Specimen Sub Types Screen.
- At a minimum, user must enter report type, report sub type and specimen type.
- To Save the screen information, click Save Specimen Sub Type.

C) Editing An Existing Specimen Sub Type:

- To edit a specimen sub type, click Edit, located next to the Specimen Sub Type ID.
- To Save the edited specimen sub type, click Save Specimen Sub Type.
17. By Selecting the Summary Diagnosis Button within the Maintenance Module, the Browse Summary Diagnosis window, as seen below, will appear. This screen has three primary functions: A) Searching For An Existing Summary Diagnosis, B) Adding A New Summary Diagnosis and C) Editing An Existing Summary Diagnosis.

A) Searching For An Existing Summary Diagnosis:

The user has two options to search for a summary diagnosis: Report Type or Report Sub type. The user can also View All Records.

Main Search Criteria:

- **Report Type**, where the user must choose one type from the list and
- **Report Sub Type** – User must choose one type from the list.
B) Establishing A New Summary Diagnosis:

- To add a new summary diagnosis, click **New Summary Diagnosis**, located in the top tool bar. At a minimum, user must enter report type, report sub type and diagnosis.
- To save the screen information, click **Save Summary Diagnosis**.

C) Editing An Existing Summary Diagnosis:

- To edit a summary diagnosis, click **Edit**, located next to the **Summary Diagnosis ID**.
- To Save the edited summary diagnosis, click **Save Summary Diagnosis**.
18. By selecting the Tests button within the Maintenance Module, the Tests window, as seen below, will appear. This screen has three primary functions: A) View Existing Tests and/or Stains, B) Adding a New Test and/or Stain, C) Editing an Existing Test and/or Stain.

The window above allows the user to view all existing tests and stains within PathX. By expanding the categories on the left section of the screen, the user can set test and/or staining default options.

If the test group does not exist in the left hand column, it can be created by clicking the Test Group sub tab and entering the required description.
19. By Selecting the **Incident Type** Button within the Maintenance Module, the **Incident Type Maintenance** window, as seen below, will appear. This screen has three primary functions: **A) Search Existing Incident Types, B) Adding A New Incident Type or C) Editing An Existing Incident Type.**

![Incident Type Maintenance Window](image)

**A) Searching Existing Incident Types:**

The user has one option to search: Incident Type.

**Main Search Criteria:**

- Incident Type – Enter entire incident type or a few characters to display all matches.
B) Establishing A New Incident Type:
- To add new incident type, click **New Incident Type**. User must enter incident type.
- To save the screen information, click **Save Incident Type**.

C) Editing An Existing Incident Type:
- To edit an incident type click on the **Edit** button located next to the Incident Type ID.
- To Save the incident type that was selected click on the **Update Incident Type** button.
20. By selecting the **Correction Reasons Type** button within the Maintenance Module, the **Correction Reasons Type Maintenance** window, as seen below, will appear. The Correction Reasons Type toolset performs two primary functions: A) Adding New Correction Reasons, and B) Editing Existing Correction Reasons.

A) Establishing A New Correction Reason:
- To add a new correction reason type, click **New Correction Reason Type**. User must enter correction reason type.
- To save the screen information, click **Save Correction Reason Type**.

B) Editing An Existing Correction Reason:
- To edit a correction reason type, click **Edit**, located next to the Correction Type ID.
- To update the edited incident type, click **Update Correction Reason Type**.
MANAGING IMAGE TYPES

21. By Selecting the Image Type Button within the Maintenance Module, the Image Types Maintenance window, as seen below, will appear. The Image Types toolset performs two primary functions: A) Adding New Image Types, and B) Editing Existing Image Types.

A) Establishing A New Image Type:
- To add a new image type, click New Image Type. User must enter at least the image type.
- To Save the screen information, click Save Image Type.

B) Editing An Existing Image Type:
- To edit an image type, click Edit, located next to the Image Type ID.
- To Save the edited image type, click Update Image Type.
22. By selecting the Fee Schedules button within the Maintenance Module, the Fee Schedule window, as seen below, will appear. The Fee Schedules toolset performs two primary functions: A) Viewing of existing fee schedules, and B) Editing existing fee schedules.

**Fee Schedules & Pricing Management**

**A) Viewing Existing Fee Schedules:**

- The Fee Schedules Toolset allows users to view the master fee schedule for vendors or individual client fee schedules, both of which are detailed by individual CPT Code.

**Search Criteria:**

- Searching can be completed for either vendors or clients by selecting the appropriate entity type.
- Click the Expand button for the individual CPT Code to view the fees charged.
B) Editing Existing Fee Schedules:
1. Expand the CPT Code to view the fees charged
2. Update the Fee Amount, Bill By type, or Fee Source for the appropriate charge
3. Click the Save Button.
A team of CPAs, Healthcare Attorneys and Healthcare IT professionals on the forefront of changes in industry regulations have developed and reviewed this LIS product in accordance to the latest HIPAA and HITECH regulations.

PathX currently services:
- Hospitals
- Regional Medical Centers
- Independent Laboratory Facilities
- Ambulatory Surgical Centers
- Long Term Acute Care Centers
- Hospital-Based Physician Groups
- Office-Based Physician Groups

PathX’s founders have laboratory and pathology experience dating back to 1976.
The **Utilities Module** allows authorized users to both view and edit various system parameters. The Utilities Module also serves as the primary module for accessing the various reporting functions of PathX. The Utilities Module provides twenty main functions, some of which, require user authorized access.

1. **Incidents**
   Allows the user to view and/or create an incident.

2. **Electronic Orders**
   This screen receives orders electronically from clients and allows the creation of cases upon receipt of specimens.

3. **Browse Cases**
   Allows the user to browse all cases, regardless of case status.

4. **Slide Labels**
   Allows the user to print slide labels.

5. **Additional Test**
   This screen displays all tests that have been ordered by status, client, pathologist, and vendor. It also displays reports or test orders lists both by detail and summary.

6. **Batch Scanning**
   Allows the user to scan a batch of documents from different accessions and automatically adds them to their respective accession.
CHAPTER 4: UTILITIES MODULE

7. Update Blocks/Slide
This screen allows the user to quickly update the specimen description, block, and slide count per specimen.

8. Accession Labels
Allows the user to select and print customized accession wheel labels.

9. Reports Distribution
Allows the user to view, release, remove or place on hold any results ready for distribution.

10. Pathologist Schedule
Allows the user to create the pathologist schedule and determine how many specimens read per day.

11. Slides Distribution
Allows the user to direct and document the location of slides.

12. Slides Log
Allows the user to view the slide distribution log chronologically.

13. Coder Queue
Allows users to manage and set billing codes (ICD-9) for Closed Cases.

14. Supply Order
Screen where the user can order supplies and follow up on orders through the different statuses.

15. Reports
Allows the user to run various reports available within PathX.

16. Audit
Allows user to view complete audit log.

17. Notes
Allows user to view various notes.

18. Unlock
Allows user to unlock a case currently in use by another user.

19. Shortcut
Displays all keyboard shortcuts available within PathX.

20. Release
Allows user to view various notes.

Provides the ability to upload regularly received zip code updates.
INCIDENT MANAGEMENT

1. By selecting the **Incidents** button within the **Utilities Module**, the **Browse Incidents** window, as seen below, will appear. The Incidents toolset performs three primary functions: **A)** Searching Existing Incidents **B)** Adding New Incidents, and **C)** Editing Existing Incidents.

   ![Browse Incidents Window]

**A) Searching For An Existing Incident**
- Incidents can be located by accession number, sales representative, client ID or name, and/or incident status.

**B) Establishing A New Incident:**
- To add a new incident, enter either the accession number or client ID and select **Create New** located in the top toolbar.
- To save the screen information, click **Save**.

**C) Editing An Existing Incident:**
- To edit an incident, click **View** located next to the applicable accession or client ID and edit the incident accordingly.
- To save the edited incident, select **Save**.
MANAGING ELECTRONIC ORDERS

2. By Selecting the **Electronic Orders** Button within the Utilities Module, the **Orders** window, as seen below, will appear. The Electronic Orders toolset displays orders received electronically from clients and performs two primary functions: **A)** Viewing Existing Orders, and **B)** Adding New Cases

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A) **Searching For An Existing Order:**

- Orders can be located by accession number, client ID or name, and/or order status. The results may also be filtered by creation date.

B) **Establishing A New Case:**

- To add a new Case, click **New Case** located in the first column of the orders.
- To Save the screen information, click **Save**.
3. By selecting the **Browse Cases** button within the Utilities Module, the **Browse Cases** window, as seen below, will appear. The Browse Cases toolset displays all cases within the PathX system and performs two primary functions: 

**A)** Searching Existing Cases, and 

**B)** Printing Existing Reports

---

**A) Searching For An Existing Case**

- Users can search cases using an accession number, open or close status, client, pathologist, report type, sub type, or Chart number. The search function also allows for cases to be filtered by patient or date.

**B) Printing Existing Reports:**

- To print one or more Pathology Report(s) or Pathology Gross Report(s), highlight the applicable cases by clicking the left mouse button, followed by pressing the **Print** button or **Print Gross** button.
4. By selecting the **Slide Labels** button within the Utilities Module, the **Slide Labels** window, as seen below, will appear. The Slide Labels toolset performs three primary functions: **A)** Printing Multiple Labels (Batch Printing) **B)** Printing Individual Labels, and **C)** Printing Blank Labels.

### A) Printing Batch Labels
- In order to print multiple labels, the **From** and **Thru** fields must be completed specifying the entire range of accession numbers, followed by selecting the **Print** button.

### B) Printing An Individual Label:
- Select the **Individual Print** tab located at the top of the Slide Label screen, enter the desired accession number, and select the **Print** button.

### C) Printing Blank Labels:
- Select the **Blank Labels** tab located at the top of the Slide Labels Screen, enter the accession number, specify the number of blank labels desired, and select the **Print** button.
5. By Selecting the Additional Tests Button within the Utilities Module, the Tests window, as seen below, will appear. The Additional Tests toolset performs three primary functions: A) Searching Existing Tests Ordered Within The System B) Recording Control Results For Selected Tests, and C) Canceling or Marking a Test Complete

A) Searching For Existing Tests Ordered:
- The Additional Tests Toolset allows for the user to view all of the tests that have been ordered by status, client, pathologist and vendor. The Tests Screen also allows for the user to obtain reports and/or test orders lists in detail or summary.

Search Criteria:
- Searching can be performed utilizing either the basic and advanced option.
- Basic Option allows the user the ability to search by Accession number, Status of Test (Pending, Completed, or Cancelled), Client ID or name, Pathologist, or Vendor.
- Advanced Option allows the user the ability to search by Report type, Test type or Date.
B) Recording Control Results For Selected Tests:
1. Select the Test that is to be have the results recorded by highlighting the row of the test
2. Select the Control Results button,
3. Click the appropriate result, Positive or Negative

C) Canceling Or Marking A Test Complete:
1. Select the Test that is to be canceled or marked complete by highlighting the row of the test
2. Click the Cancel button, record the reason for canceling if appropriate, then click OK
3. Click the Complete button,
PERFORMING BATCH SCANNING

6. By Selecting the Batch Scanning Button within the Utilities Module, the Document Batch Scanning window, as seen below, will appear. The Batch Scanning toolset performs one primary function: A) Scanning Multiple Documents From Different Accessions

![Document Batch Scanning Toolset](image)

The Document Batch Scanning Toolset allows the user to scan a batch of documents from different accessions and automatically assign the documents to their respective accession.

**A) Scanning Multiple Documents:**

1. Select the Page Size of the document(s) ready for scanning,
2. Press the Start Scanning button.
7. By Selecting the **Update Block/Slide** Button within the Utilities Module, the Cases Quick Update window, as seen below, will appear. The Update Block/Slide toolset performs two primary functions: **A)** Searching Existing Blocks/Slides, and **B)** Updating Block & Slide Count Values.

![Cases Quick Update](image)

**A) Searching For Existing Blocks/Slides:**
- The **Update Block/Slide Toolset** allows users the ability to view cases by accession, client and pathologist. The Cases Quick Update Screen also allows for the user to obtain cases filtered by date range.

**Search Criteria:**
- Searching can be performed utilizing either the basic and advanced option.
- Basic Option allows the user the ability to search by Accession number, Client ID or name, or Pathologist.
- Advanced Option allows the user the ability to search by Report type

**B) Updating Block/Slide Count Values:**
1. Select the Case that is to be have the block/slide count values revised
2. Select the appropriate count for the block(s) and/or slide(s).
3. Click the **Save** button located in the top right corner of the screen
8. By Selecting the Accession Labels Button within the Utilities Module, the Accession Labels window, as seen below, will appear. The Accession Labels toolset performs one primary function: A) Printing Customized Accession Wheel Labels.

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The Accession Labels Toolset allows the user to quickly select all accession wheels within the system through its Select All feature. The User may also quickly unselect all accession wheels selected by checking the Unselect All box.

A) Printing Customized Accession Wheel Labels:
1. Select the Accession Wheels desired for printing by checking the box located in the Selected column;
2. Press the Print Button located in the top right corner of the Accession Labels screen.
9. By Selecting the Reports Distribution Button within the Utilities Module, the Client Reports Distribution window, as seen below, will appear. The Reports Distribution toolset performs four primary functions: A) Viewing The Distribution Method For Existing Reports, B) Placing Or Removing Holds C) Canceling The Delivery of a Report and, D) Releasing Reports Previously Placed on Hold.

A) Searching Distribution Routes For Current Reports:
1. Select the criteria for the searching of Report Distribution Routes, i.e. Delivery Type, Report Status, Client, Report Type or Accession Number
2. Define the date range for filtering if appropriate
3. Click the Search button.
B) Placing Or Removing A Hold From An Existing Report:
1. Select the Report for which the hold is to be placed or removed from by checking the box located in the Select Column
2. Click the Hold Reports button located in the top right corner of the screen
3. Click the Un Hold Reports Button located at the top center of the screen.

C) Canceling The Delivery of a Report:
1. Select the Report for which the deliver is to be canceled by checking the box located in the Select Column
2. Click the Remove Reports button located in the top right corner of the screen

D) Resending Reports Previously Delivered
1. Select the Report for which the delivery is to be resent by checking the box located in the Select Column
2. Click the Resend Reports button located in the top center of the screen
By Selecting the Pathologist Schedule Button within the Utilities Module, the Pathologist Schedule window, as seen below, will appear. The Pathologist Schedule toolset performs two primary functions: A) Viewing the Schedules of Existing Key Personnel, and B) Recording and/or Updating the Schedules of Key Personnel.

MANAGING PATHOLOGIST SCHEDULES

A) Viewing Existing Schedules:

1. Upon accessing the Pathologist Schedule Toolset, the calendar showing the current month will be available for viewing and will detail of the activities scheduled.
2. To view an historical or future month, press the left or right arrows located next to the month in the Calendar or Monthly Schedule sections.
B) Adding A Batch of Events To The Schedule:
1. Select the date for which the events are to be scheduled. Note: the date for the events will be highlighted Yellow
2. Press the Add to Batch button
3. Select the Pathologist from the drop down menu.
4. Select the Location from the drop down menu.
5. Define the Quota of Specimens
6. Press Add All

B) Adding A New Single Event To The Schedule:
1. Select the date for which the event is to be scheduled. Note: the date for the event will be highlighted Yellow
2. Press the Add to Schedule button
3. Select the Pathologist from the drop down menu.
4. Select the Location from the drop down menu.
5. Define the Quota of Specimens
6. Add additional commentary if needed
7. Press Save
MANAGING SLIDE DISTRIBUTION & LOCATIONS

11. By Selecting the **Slide Distribution** Button within the Utilities Module, the **Slides Distribution** window, as seen below, will appear. The Slide Distribution toolset performs two primary functions: **A)** Viewing the Location of Existing Slides, and **B)** Recording and/or Updating the Location of Existing Slides and, **C)** Recording and/or Updating Case Data.

A) Searching For Existing Slide Locations:

- The **Slide Distribution Toolset** allows users the ability to view the current or last recorded location of slides.

**Search Criteria:**

- Searching can be performed utilizing either the basic and advanced option.
- Basic Option allows the user the ability to search by Accession number, Client ID or name, Slide Location or Pathologist.
- Advanced Option allows the user the ability to search by Report type.
B) Recording and/or Updating the Location of Existing Slides:
1. Select the Case that is to be have the slide location revised
2. Click the Forward Slides Button,
3. Select the current location, and add addition comments if deemed necessary
4. Click the Save Button.

C) Recording and/or Updating Case Data:
1. Select the Case that is to be have the case data revised
2. Click the Update Cases Button,
3. Select the current diagnosis location and/or pathologist
4. Click the Save Button.
12. By Selecting the Slide Log Button within the Utilities Module, the Slides Distribution Log window, as seen below, will appear. The Slide Log toolset performs one primary function: A) Viewing Existing Slides Logged Within The System.

A) Searching Slides Logged Within The System:
1. Select the criteria for the searching of slides, i.e. Accession Number, Client, Slide Location
2. Define the date rage for the slides
3. In the event the user desires to search by Report Type, click on the Advanced tab and select the report
4. Click the Search button.
CASE CODING

13. By Selecting the Coder Queue Button within the Utilities Module, the Coder Queue window, as seen below, will appear. The Coder Queue toolset performs two primary functions: A) Accessing Codes Associated with Existing Cases B) Assign/Remove Coding, or C) Hold or Mark Cases Completed

The Coder Queue Toolset allows for the assignment of ICD-9 and CPT Codes to cases which are closed. When enabled, cases that have been signed out are placed in the Coder Queue. PathX has been designed to list the Pending Cases upon opening the Coder Queue Toolset.

A) Searching Cases To Review Coding:
- Users have the ability to filter existing cases via the Search Criteria Engine located on the left side of the Coder Queue Toolset

Search Criteria:
- Searching can be performed utilizing either the basic and advanced option.
- Basic Option allows the user the ability to search by Accession number, Case Status, Client ID or name, or Pathologist.
- Advanced Option allows the user the ability to search by Report Type and/or Date.
CASE CODING

Note: Multiple cases can be selected by holding the CTRL key (to individually select cases) or the Shift key (to select a consecutive group of cases).

B) Applying Coding To A Case:
- After locating the case, press the button associated with the coding needing to be assigned, CPT or ICD9.
- Select the applicable coding for the case
- Press the Save Button.

C) Placing A Case on Hold, Marking A Case Complete, Or Removing A Case:
- In the event a case needs to be held for various reasons, a Hold can be placed by highlighting the applicable case and pressing the Hold Button. For those cases were a Hold is placed, PathX requires an explanation be documented.
- If the codes recorded within a case are correct, users can mark the case complete by highlighting the applicable case and pressing the Complete Button. Cases will not be made available for billing until marked complete. After the case is marked complete, the status will update to Sent to Billing.
- For cases were no Coding is required, users can remove the case from the queue by highlighting the applicable case and pressing the Remove Button.
MANAGING LAB SUPPLY ORDERS

14. By Selecting the Supply Order Button within the Utilities Module, the Browse Supply Orders window, as seen below, will appear. The Supply Order toolset performs two primary functions: A) Tracking Laboratory Supplies Ordered and Recorded Within The System, and B) Editing Existing Supply Orders, and, C) Recording New Supply Requests.

A) Searching Supplies Ordered Within The System:
1. Select the criteria for the searching of supply orders, i.e. Order Status, Order Origination, Client or User
2. Define the date range for the supply orders
3. Click the Search button.
B) Editing Existing Orders:
1. Locate the Supply Order by completing the necessary search
2. Select the Edit button located to the left of the Requisition ID. Number of the order
3. Perform the necessary edits to the order
4. Click OK

C) Adding A New Supply Order:
1. On the Browse Supply Orders Home Screen, Select the New Supply Request Order button.
2. Select the Client for which the Order will pertain to
3. Select the Supplies to be ordered by checking the box next to the applicable item.
4. Select the quantity of the supply to be ordered.
5. Click Save New Order
15. By Selecting the Reports Button within the Utilities Module, the Browse Reports window, as seen below, will appear. The Reports toolset performs one primary function: A) Viewing Various Operational Metrics (Running Reports).

![Browse Reports Window](image)

The Reports Toolset allows the user to quickly run reports by Client ID or Name for a specified time period. Depending upon the type of report selected, the user may have the option to obtain sub reports.

**A) Viewing Various Operational Metrics (Running Reports):**

1. Select the Report type from the left hand column.
2. Designate the Run Report criteria, i.e. Date Range, Month, Year, Client ID, Client Name, Pathologist, Sub-Type
3. Select Preview
REPORTING — CANNED REPORTS

i. Billing


ii. Client Services


iii. Daily


iv. End of Month

Corrected Reports Report, Frozen Sections Report—Detailed, Frozen Sections Report Summary, Total Number of Units by CPT, Total Number of Units by CPT and Modifier, Total Specimens by Specimen Type—Detailed, Total Specimens by Specimen Type—Summary, Transcription Statistics Weekly Report, Turn Around Time Report—Detailed, Turn Around Time Summary Report

v. Lab


vi. Marketing


vii. Slides Distribution

Slides Distribution Reconciliation Report
REPORTING — CANNED REPORTS

1. **Standard Cases**
   Sub reports: Miscellaneous, Breast Pathology, Dermatology, Gastroenterology, Hematopathology, GYN-Histology, Uro-Histology, Prostate, Oral Pathology, FNA Cytology, and Non-GYN Cytology.

2. **Slide Prep Only Cases**
   Sub reports: Miscellaneous, Breast Pathology, Dermatology, Gastroenterology, Hematopathology, GYN-Histology, Uro-Histology, Prostate, Oral Pathology, FNA Cytology, and Non-GYN Cytology.

3. **Consultation**
   Sub reports: Miscellaneous, Breast Pathology, Dermatology, Gastroenterology, Hematopathology, GYN-Histology, Uro-Histology, Prostate, Oral Pathology, FNA Cytology, and Non-GYN Cytology.

4. **Read Only**
   Sub reports: Miscellaneous, Breast Pathology, Dermatology, Gastroenterology, Hematopathology, GYN-Histology, Uro-Histology, Prostate, Oral Pathology, FNA Cytology, and Non-GYN Cytology.

5. **Gross Only**
   Sub reports: Miscellaneous, Breast Pathology, Dermatology, Gastroenterology, Hematopathology, GYN-Histology, Uro-Histology, Prostate, Oral Pathology, FNA Cytology, and Non-GYN Cytology.

6. **Other**
   Problem and Pass Through.

7. **Special Test Only**
   Sub reports: Breast Pathology, Dermatology, FNA Cytology, Gastroenterology, GYN-Histology, Hematopathology, Miscellaneous, Non-GYN Cytology, Oral Pathology, Prostate, and Uro-Histology.

8. **Stain Only**
   Sub reports: Breast Pathology, Dermatology, FNA Cytology, Gastroenterology, GYN Histology, Hematopathology, Miscellaneous, Non-GYN Cytology, Oral Pathology, Prostate, and Uro-Histology.
16. By Selecting the Audit Button within the Utilities Module, the Browse Audit Log window, as seen below, will appear. The Browse Audit Log toolset performs one primary function: A) Viewing Tasks, Activities and Events Logged and Recorded Within The PathX System.

The Audit Toolset allows users to the ability to view all actions completed within the PathX LIS system. Users have the ability to search the logs recorded within the system by Accession Number, Event Type, User or Client.

A) Searching System Logs
1. Select the criteria for which you desire to see log activity, i.e. Accession, Event Type, User or Client
2. Define the date rage for the data logs
3. If you prefer results to by filtered by event date or by patient, check the corresponding box
4. Click the Search button.
17. By Selecting the Notes Button within the Utilities Module, the Notes window, as seen below, will appear. The Notes toolset performs one primary functions: A) Viewing Existing Notes Within The System,

![Notes Window](image)

The Notes Toolset allows users the ability to quickly view all notes within the system. The user can search a specified time period by Client ID, Client Name or Accession number and for a specified Notes Type.

**A) Viewing Existing Notes Within The System:**

1. Enter the Client ID, Client Name or Accession Number.
2. Enter the **Filter by Date** criteria, i.e. Date Range, Month, Year, Client ID, Client Name, Pathologist, Sub-Type
3. Select **Preview**
18. By Selecting the Unlock Button within the Utilities Module, the Unlock Cases window, as seen below, will appear. This Unlock Cases toolset has one primary function: A) Unlocking Cases That Have Been Locked By Another User.

The Unlock Cases Toolset allows users to unlock cases that are currently being used by another user.

A) Unlocking Cases Within The System:
1. Highlight the row of the case you wish to unlock.
2. Double click the highlighted cases to unlock.
19. By Selecting the Shortcut Button within the Utilities Module, the Keyboard Shortcut Keys Reference Document will appear. Keyboard shortcuts allow users to save valuable time by quickly selecting options relevant to the task at hand. Each of the Keyboard Shortcuts are listed below:

<table>
<thead>
<tr>
<th>Patients Module</th>
<th>Cases Module</th>
<th>Utilities Module</th>
<th>Maintenance Module</th>
<th>Cases Toolset</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt N—Opens the Patient Toolset</td>
<td>Alt N—New Case</td>
<td>Alt I—Incidents</td>
<td>Alt U—User</td>
<td>Alt N—Opens Notes Toolset</td>
</tr>
<tr>
<td>Alt E—View Patients</td>
<td>Alt O—Show Open Cases</td>
<td>Alt O—Electronic Orders</td>
<td>Alt L—Location</td>
<td>Alt O—Charge Code Entry</td>
</tr>
<tr>
<td>Alt X—Exit</td>
<td>Alt C—Show Closed Cases</td>
<td>Alt T—Additional Tests</td>
<td>Alt G—Gross Location</td>
<td>Alt E—Create / View Specimens</td>
</tr>
<tr>
<td></td>
<td>Alt Q—Quick Search</td>
<td>Alt A—Audit</td>
<td>Alt M—Microscopic Description</td>
<td>Alt D—Patient Demographics</td>
</tr>
<tr>
<td></td>
<td>Alt X—Exit</td>
<td>Alt N—Notes</td>
<td>Alt D—Diagnosis</td>
<td>Alt L—Clinical History</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Alt U—Unlock Cases</td>
<td>Alt B—Client</td>
<td>Alt P—Add Referring/Requesting Physician</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Alt S—Keyboard Shortcuts</td>
<td>Alt C—Insurance</td>
<td>Alt F—Print Preview</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Alt R—Release</td>
<td>Alt T—Pathologist Instruction</td>
<td>Alt T—Case Status</td>
</tr>
</tbody>
</table>

Specimens Toolset

F1—Specimen 1
F2—Specimen 2
F3—Specimen 3, etc.
Alt E—Specimen Description
Alt G—Gross Description
Alt M—Microscopic Description
Alt D—Diagnosis
Alt B—Blocks
Alt W—Edit in PathX Word
Alt F—Return From PathX Word
Alt S—Save
Alt U—Update (Existing Case)
Alt C—Close

Maintenance Module

Alt U—User
Alt L—Location
Alt G—Gross Location
Alt O—Owners
Alt F—Referring
Alt Q—Requesting
Alt P—Pathologist Instruction
Alt I—Insurance
Alt C—Client
Alt S—Specimen Type
Alt T—Specimen Sub Type
Alt D—Summary Diagnosis
Alt N—Incident Type
Alt R—Correction Reasons Type
Alt M—Image Type

Cases Toolset

Alt N—Opens Notes Toolset
Alt O—Charge Code Entry
Alt E—Create / View Specimens
Alt D—Patient Demographics
Alt L—Clinical History
Alt P—Add Referring/Requesting Physician
Alt F—Print Preview
Alt T—Case Status
Alt S—Save
Alt U—Update (Existing Case)
Alt C—Close
20. By selecting the Release Button within the Utilities Module, MS Internet Explorer will open, detailing all of the latest releases of the PathX LIS Software and the enhancements which were made. The Release Toolset serves only one primary function: A) Viewing programming and development changes which have been made to the software.

<?xml version="1.0" encoding="utf-8" ?>
- <Manifest>
  - <Version Number="5.0.2" PublishedOn="" >
    - <Update Type="New" Title="Test Reports" Description="Add 'DUAL Her2 by ISH' test screen and new test report." />
    - <Update Type="Change" Title="Billing Service" Description="Modified billing rules for IHC (Immunos and cpt code 88342) to bill per Specimen instead of per Block for Reliance lab only." />
    - <Update Type="Change" Title="HL7 Results Messages" Description="Modified logic of the HL7 Builder to include the Facility Name as part of the OBR and OBX segments" />
  </Version>
- <Version Number="5.0.1" PublishedOn="1-8-2012 7:05 PM">   
  - <Update Type="New" Title="Coder Queue Screen" Description="Created new screen to allow to the users to review charges and mark reports as 'Completed' for billing interface." />
  - <Update Type="Change" Title="Cases Screen" Description="Modified to auto populate the Patient Account Number from the electronic files into the field 'Requisition #' during accessioning." />
  - <Update Type="Change" Title="Specimens Screen" Description="Added support for Specimen Letters instead of numbers, based on the client preference." />
  - <Update Type="Change" Title="Pathology Reports" Description="Modified to be able to print Specimen Lettering over numbering, based on the client preference." />
  - <Update Type="Change" Title="Pathology Reports" Description="Added setting 'Type of Account' at the client level to be able to print the Patient Account Number in the Pathology Reports, rather than always the Client Account Number." />
  - <Update Type="Change" Title="Pathology Reports" Description="Added setting 'Detail Keep Together' at the company level to avoid printing nothing on the first page for reports longer than one page." />
</Version>
- <Version Number="5.0.0" PublishedOn="11-6-2011 11:15 PM">   
  - <Update Type="New" Title="Gross Locations Screen" Description="New screen created to add and update gross locations information." />
  - <Update Type="Change" Title="Main Screen" Description="Created new presentation window, pathx logo and changed colors from the Main screen." />
  - <Update Type="Change" Title="Gross Locations" Description="Modified logic to be able to have many"
ZIP CODE MANAGEMENT

21. By Selecting the Zip Code Updater Button within the Utilities Module, the Zip Code Updater window, as seen below, will appear. The Zip Code Updater toolset performs one primary function: A) Updating Regularly Received Zip Code Updates

The Zip Code Updater Toolset allows users to the ability to quickly load files containing zip codes which need to be updated, revised or newly entered into the PathX system.

A) Updating Regularly Received Zip Code Updates:
1. Select the Browse button to locate the file containing the listing of zip codes.
2. Locate the file containing the list of zip codes.
3. Select Open
REMOTE PATHOLOGIST MODULE
The Remote Module within PathX has been designed to offer a Pathologist the ability to quickly access the primary tasks associated with the completion of Pathology and Pathology Gross Reports. The module serves as the primary application for assigning digital imagery, editing currently open reports, and signing out completed cases.

1. **Take Pictures**
   A fast and efficient way to take pictures, eliminating any wait time between cases.

2. **Edit Test Reports**
   Allows users the ability to enter assay results for Breast Prognostic and SISH tests.

3. **Sign Out Cases**
   Displays currently open cases at a glance. Allows for quick viewing of all report data prior to case sign-out in one window.
1. By Selecting the **Take Pictures** Button within the Remote Pathologist Module, the **Case Images** window, as seen below, will appear. This screen has two primary functions:

   **A) Assigning Digital Images to Cases**

   **B) Printing, Deleting and Enlarging Pictures**

PathX has the ability to add multiple pictures per case, and users may also associate the specimen’s case number to the picture. The following instructions will help navigate through the **Cases Images Screen**; the instructions can also located by selecting **Help**.

**A) Assigning Digital Images to Cases:**

1) Select the Accession number from the Dropdown.

2) Take picture.

3) Select **Capture Image** to add the picture to the case.

4) Enter the specimen number for the added picture (Use the up/down arrows to change the specimen number).

5) If desired, the user may also add comments to be included with the picture.

6) If the user has more pictures to add to the case, repeat Steps 2 through 5; otherwise proceed.

7) If more than one picture is added, the user must select which picture is to appear in the final report by selecting **Push Pin** located next to the desired picture in the final pathology report.

8) Select **Save** and wait for the “Images Saved Successfully” notification.

**Figure**: 

The image shows a screenshot of the Case Images window with fields for Client, Patient, and Clinical Data, and options for viewing all cases, finding images, and ordering tests. The window also includes buttons for taking pictures, adding images, and performing other actions related to managing digital imagery.
The user may view all images added to the case by selecting Manage Images found within the Tools menu of the Case Screen. Additional pictures such as Requisition, Gross Image, Patient Driver’s License, Patient Insurance Card or Patient Medical History can also be attached to the case.

**Attaching Selected Image to Report:**

A user may select a picture to attach to the final pathology report utilizing the toolbar icons located on the right-hand side of the pictures. The user also has the ability to change the specimen number after the picture is added by selecting the icon to view/hide the image details.

**B) Assigning Digital Images to Cases:**

The user has the ability to delete pictures from reports and/or print pictures. This functionality is also located within the toolbar located to the right of the picture. To enlarge the image, simply click anywhere on the picture.
2. If an error has been detected prior to sign-out in a Specimen Description, Gross Description, Microscopic Description, or Diagnosis, the user has two options to complete the editing process depending on the user’s preference: **A)** Editing Within the Specimen Screen (Seen Below) or **B)** Editing within the PathX Word Component

**Method 1:** Edit within the system.

- Within the Specimens Window as seen above, a user can modify the Specimen Description, Gross Description, Microscopic Description, and the Diagnosis. Once the revision has been completed, select Save.
Method 2: Edit within the PathX Word Component

- While the LIS is operating, Click Ctrl+F to enter Word from PathX. (Clicking Ctrl+W returns the user to PathX).

- For security purposes, PathX has been designed to restrict the editing of text, only allowing the user who has dictated the text the ability to change the text. Within the picture above, the highlighted text is the only text which can be edited.
SIGNING OUT CASES

3. By Selecting the Sign Out Cases Button within the Remote Pathologist Module, the Pathologist Queue window, as seen below, will appear. This screen serves two primary functions: A) Editing Existing Cases  B) Signing-Out Pending Cases

A) Editing Existing Cases
- In the event the pathologist desires to edit a case pending sign-out, by selecting the Case button located immediately to the left of the accession number. The diagnosis can also be edited by selecting the Edit button for the applicable accession.

B) Signing-Out Pending Cases
1. Click on the View drop down list “My Open Cases.”
2. Select case to sign out.
3. Review the report displayed at the bottom of the screen for accuracy.
4. Select Sign Out, located at the top-right of the screen.