

## SPECIMEN PROCESSING CHECKLIST: ONLINE

1. Treating provider identifies patient to be tested based on medical necessity.
2. Patient takes a urine collection cup or Quantisal® oral fluid collection device and provides a sample.
  - To ensure no residual medication in the oral cavity, instruct patient to rinse mouth with water a minimum of 5 minutes prior to oral fluid collection. This is good practice and recommended, but not required.
3. Go to <https://pdx.careevolve.com/>
4. Login using your unique login identification which includes your Username, Password, and Location Code.
5. Once logged in, you will be directed to the “Results” tab.
6. To create a new test order, hover over the “Orders” tab and select “New Order”.
  - If the patient is an existing patient in CareEvolve, search by patient information (last name, DOB, etc.) and select the patient you’ve collected from. If the patient is new, hover over the “Patients” tab and select “Add Patient”.
    - » If you are adding a new patient, fill in all required information. The required fields are in red and are bolded.
  - Once you’ve selected the existing patient or added a new patient, you will be directed to the “New Order” screen, which includes these following steps:
    - » **Step 1 - Demographics:** Review provider and demographic information. Once confirmed, select “Next” at the bottom of the page.
    - » **Step 2 - Tests:** Select your testing option. Options include “Test Group(s)” if one has been created, or select the individual test(s) based on medical necessity. To record POC results, search for “POC” and select. During Step 4, you will have the option to enter the POC results.
    - » **Step 3 - Medication(s):** Select medication(s) by typing in the desired medication or selecting from the provided list.
    - » **Step 4 - Point of Care:** Select the Point of Care (POC) result obtained in office using the drop down menu corresponding to each analyte that was tested in house. The options are: Positive, Negative, or Not Tested.
    - » **Step 5 - Diagnosis Code(s):** Select diagnosis code(s) provided by the treating provider.
    - » **Step 6 - Review:** Review order which includes: diagnosis code(s), testing, medication(s), collection time and date (which will be recorded automatically). Please update if the date of collection and the date of submission are different. Indicate the specimen collector in the “Coll. by” field, if different from the provider. The order should be documented and signed by the treating provider in the patient’s medical record.
    - » Carefully review all fields to ensure information accuracy, then click on “Complete” at the bottom of the page.
    - » Once submitted, you’ll receive an “Order Requisition/Label” pop-up. Print the barcode label. The label will include the patient’s full name, specimen ID, provider, date of collection, and date of birth.
    - » Place the barcode label, which includes at least two patient identifiers, over the device.
    - » Have the patient initial the barcode label once the label is affixed on the specimen device. This is good practice and recommended, but not required.
7. Please be sure that the specimen device is secure to prevent any leaks in transit to the laboratory.
8. Place the device into the biohazard specimen bag and ensure the bag is sealed.
9. Place the biohazard specimen bag into the shipping bag (FedEx/UPS) and affix the shipping label to the outside of the package.
10. Schedule a FedEx or UPS pickup by calling **(800) 635-6901, Option 3.**

### CareEvolve Order Entry Guide



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## SPECIMEN PROCESSING CHECKLIST: **PAPER**

1. Treating provider identifies patient to be tested based on medical necessity.
2. Patient takes a urine collection cup or Quantisal® oral fluid collection device and provides a sample.
  - To ensure no residual medication in the oral cavity, instruct patient to rinse mouth with water a minimum of 5 minutes prior to oral fluid collection. This is good practice and recommended, but not required.
3. Once the sample is collected from the patient, place the provided barcode label (located in the top left corner of the requisition and must include at least two patient identifiers) over the device. At minimum, two unique identifiers must be written on or attached to the collection device.
4. Have the patient initial the barcode label once the label is affixed on the specimen device.
5. Accurately and thoroughly complete the patient information on the requisition form. At minimum: please include full patient name, date of birth, and gender - matching the patient identifiers indicated on the barcode label.
  - You may also include a copy of the demographic sheet and send it in with the sample.
6. Indicate specimen type (urine or oral fluid) along with the date of collection.
7. Indicate the diagnosis code(s) provided by the treating provider.
8. Optional: To record POC results, please indicate in the appropriate area on the requisition form.
9. Select your testing option. Options include: "Perform Custom Profile" - if one has been established - or select "Do Not Perform Custom Profile" and select the individual test(s) based on medical necessity.
10. Select medication(s) from the provided list on the requisition form or make a copy of the patient's medication list and place it inside the biohazard specimen bag.
11. Make a copy of the patient's health insurance and place it into the biohazard specimen bag.
12. Have the treating provider sign and date the bottom of the requisition form before completion. This is good practice and recommended, but not required. The order should be documented and signed by the treating provider in the patient's medical record.
13. Review the requisition form to ensure all necessary information has been completed.
14. Please be sure that the specimen device is secure to prevent any leaks in transit to the laboratory.
15. Fold the requisition form along with any other patient demographics (e.g. insurance, medication lists, etc.) into fourths, and place the information in the back pocket of the biohazard specimen bag.
16. Place the specimen in the front of the biohazard specimen bag and ensure the bag is sealed.
17. Place the biohazard specimen bag into the shipping bag (FedEx/UPS) and affix the shipping label to the outside of the package.
18. Schedule a FedEx or UPS pickup by calling **(800) 635-6901, Option 3.**

### Paper Req Form Guide



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