

THE NEW PATH FOR PATH LABS



pathx 
Laboratory Information System™

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A LETTER FROM THE PRESIDENT.

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.

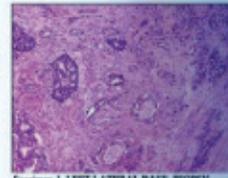
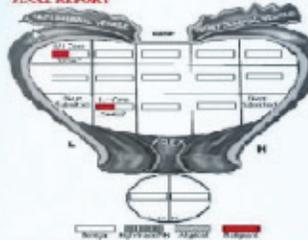
- Select **New** to begin creation of a new Case. The **New Case** screen will open.
- Select the **Report Type** and **Sub Report Type** from the dropdown menus.
- Insert the **Collected Date** (required).
- Add **Patient Demographic** data as known. The SSN is not required, but other data will populate 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**



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Clinical Data
ELEVATED PSA

FINAL REPORT



Specimen 1, LEFT LATERAL BASE, BIOPSY

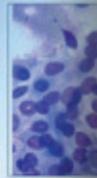
SUMMARY DIAGNOSIS

1. Left Lateral Base, ADENOCARCINOMA
2. Left Lateral Base, BENIGN PROSTATIC TISSUE
3. Left Base, BENIGN PROSTATIC TISSUE
4. Left Mid, BENIGN PROSTATIC TISSUE
5. Left Apex, ADENOCARCINOMA
6. Right Base, BENIGN PROSTATIC TISSUE
7. Right Mid, BENIGN PROSTATIC TISSUE
8. Right Apex, BENIGN PROSTATIC TISSUE
9. Right Lateral Base, BENIGN PROSTATIC TISSUE
10. Right Transition, BENIGN PROSTATIC TISSUE
11. Left Transition, BENIGN PROSTATIC TISSUE
12. Right Transition, BENIGN PROSTATIC TISSUE

SPECIMEN 1: Left Lateral Base, Gleason's score 7 (Grades 3+4) noted in 1 out of 2 submitted prostate core segments, approximately 10% of submitted tissue involved.
GROSS DESCRIPTION: Received in formalin and labeled with the patient's name and designated as "left lateral base" in a tan core tissue segment measuring 0.7 x 0.1 cm. The specimen is submitted in two in one cassette labeled I.A.

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CYTOLOGY REPORT



SPECIMEN 1, THYROID MICROSCOPIC DIAGNOSIS

Diagnosis - Papillary Adenocarcinoma - Solid

SCREENED BY: GROSS DESCRIPTION Received 10/1/12 Received 8/1/12

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Clinical Data

LEFT BREAST NAX SUPPLEMENT



SPECIMEN 1, SLIDE MICROSCOPIC DIAGNOSIS

Diagnosis - Papillary Adenocarcinoma - Solid

SCREENED BY: GROSS DESCRIPTION Received 10/1/12 Received 8/1/12

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Clinical Data

PREVIOUS AID



SPECIMEN 1, SLIDE MICROSCOPIC DIAGNOSIS

Diagnosis - Papillary Adenocarcinoma - Solid

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Clinical Data

GYN PATRIE



SPECIMEN 1, SLIDE MICROSCOPIC DIAGNOSIS

Diagnosis - Papillary Adenocarcinoma - Solid

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Clinical Data

EXCISION



SPECIMEN 1, SLIDE MICROSCOPIC DIAGNOSIS

Diagnosis - Papillary Adenocarcinoma - Solid

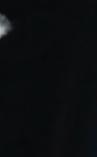
SCREENED BY: GROSS DESCRIPTION Received 10/1/12 Received 8/1/12

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Clinical Data

EXCISION



SPECIMEN 1, SLIDE MICROSCOPIC DIAGNOSIS

Diagnosis - Papillary Adenocarcinoma - Solid

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Clinical Data

EXCISION



SPECIMEN 1, SLIDE MICROSCOPIC DIAGNOSIS

Diagnosis - Papillary Adenocarcinoma - Solid

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PATIENTS MODULE

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Clinical Data
ELEVATED PSA



SPECIMEN 1, SLIDE MICROSCOPIC DIAGNOSIS

Diagnosis - Papillary Adenocarcinoma - Solid

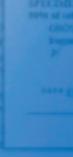
SCREENED BY: GROSS DESCRIPTION Received 10/1/12 Received 8/1/12

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Clinical Data

SKIN'S MELAS



SPECIMEN 1, SLIDE MICROSCOPIC DIAGNOSIS

Diagnosis - Papillary Adenocarcinoma - Solid

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Clinical Data

FNA THYROID

CYTOLOGY REPORT

Diagnosis - Papillary Adenocarcinoma - Solid

SCREENED BY: GROSS DESCRIPTION Received 10/1/12 Received 8/1/12

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CHAPTER 1: PATIENTS 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 existing 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 PATIENTS

The screenshot shows a web application window titled "Patients" with a toolbar containing "Add Insurance", "Save", and "Close" buttons. The main form is divided into several sections:

- Demographics:** Includes fields for Social Security, Driver License, Birth Date, and Sex.
- Names:** Includes fields for Last, First, and Middle names.
- Alias or Maiden Name:** Includes fields for Last and First names.
- Contact Information:** Includes fields for Daytime Phone and Other Phone.
- Employer:** Includes a field for Name.
- Address:** Includes fields for Address, City, State, and Zip Code.

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.

CREATING NEW PATIENTS

The screenshot shows a web application window titled "Patients" with a standard Windows-style title bar (minimize, maximize, close buttons). Below the title bar is a menu bar with "Add Insurance", "Save", and "Close" options. The main content area has five tabs: "Demographics", "Responsible Party", "Insurance", "History", and "Notes". The "Demographics" tab is active and contains several input fields:

- Demographics Section:** Social Security (text field), Driver License (text field), Birth Date (date field), Sex (dropdown menu).
- Names Section:** Last (text field), First (text field), Middle (text field).
- Alias or Maiden Name Section:** Last (text field), First (text field).
- Contact Information Section:** Daytime Phone (text field), Other Phone (text field).
- Employer Section:** Name (text field).
- Address Section:** Address (text field), City (text field), State (text field), Zip Code (text field).

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

The screenshot shows the 'BrowsePatients' application window. On the left is a 'Search Criteria' panel with two tabs: 'Main' and 'Additional Filters'. The 'Main' tab is active and contains search fields for SSN, Last Name, and First Name, each with an asterisk indicating partial matching. Below these are radio buttons for 'Birth Date' search options: 'Fixed Date' (selected), 'Specific year / month', and 'Date Range'. A date input field is also present. A 'Search' button is at the bottom of the panel. The main area of the window is a table with columns: Edit, First Name, Last Name, SSN, Birth Date, Phone, Address, City, and State. The table contains 20 rows of patient data. The first row is highlighted in yellow.

| Edit | First Name | Last Name | SSN | Birth Date | Phone | Address | City | State |
|------|------------|-----------|-------------|------------|------------|------------------|-------|-------|
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | 123 TESTING LANE | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | DUMMY | TEST | 111-11-1111 | 01/01/1958 | 4075551212 | 123 ANY STREET | TAMPA | FL |
| Edit | PATIENT6 | AXIOM | 111-11-1111 | 01/01/1995 | 3525455650 | 1234 TEST STREET | TAMPA | FL |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |

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.

SEARCHING EXISTING PATIENTS

The screenshot shows the 'BrowsePatients' application window. It has a title bar with standard window controls and buttons for 'New Patient' and 'Close'. Below the title bar is a 'Search Criteria' section with two tabs: 'Main' and 'Additional Filters'. The 'Main' tab is active and contains several input fields: 'Creation Date' with radio buttons for 'Fixed Date', 'Specific year / month', and 'Date Range'; a date input field with a placeholder '___/___/___'; 'Phone Number' with a placeholder '() ___-___'; 'City' with a placeholder '___'; 'State' with a placeholder '___' and an asterisk; and 'Zip Code' with a placeholder '___'. A 'Search' button is at the bottom of the search criteria section. To the right of the search criteria is a table with columns for 'First Name' and 'State'. The table contains 18 rows of patient data, each with an 'Edit' button in the first column. The patients listed are: PATIENT, PATIENT, PATIENT, PATIENT, PATIENT, PATIENT, DUMMY (FL), PATIENTS (FL), MARILYN, FANNY, PATIENT, DANIEL (FL), KIMBERLEE, KIMBERLEE (FL), PAM (FL), ERIKA (FL), PATIENT (FL), ALEXANDER (FL), PAUL, PAUL (FL), ALLEN (FL), SIGOURNEY (WA), and DARCEE.

| | First Name | State |
|------|------------|-------|
| Edit | PATIENT | |
| Edit | DUMMY | FL |
| Edit | PATIENTS | FL |
| Edit | MARILYN | |
| Edit | FANNY | |
| Edit | PATIENT | |
| Edit | DANIEL | FL |
| Edit | KIMBERLEE | |
| Edit | KIMBERLEE | FL |
| Edit | PAM | FL |
| Edit | ERIKA | FL |
| Edit | PATIENT | FL |
| Edit | ALEXANDER | FL |
| Edit | PAUL | |
| Edit | PAUL | FL |
| Edit | ALLEN | FL |
| Edit | SIGOURNEY | WA |
| Edit | DARCEE | |

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 EXISTING PATIENTS

The screenshot shows the 'BrowsePatients' application window. On the left is a search criteria panel with fields for SSN, Last Name, and First Name, and radio buttons for Birth Date (Fixed Date, Specific year / month, Date Range). A 'Search' button is at the bottom of the panel. The main area is a table with columns: Edit, First Name, Last Name, SSN, Birth Date, Phone, Address, City, and State. The table contains 20 rows of patient data. The first row is highlighted in yellow and shows 'PATIENT SAMPLE' with SSN '123-45-6789' and birth date '01/01/1901'. The second row is also highlighted and shows 'PATIENT6 AXIOM' with SSN '111-11-1111' and birth date '01/01/1995'. The third row is highlighted and shows 'DUMMY TEST' with SSN '111-11-1111' and birth date '01/01/1958'. The remaining rows are not highlighted.

| | First Name | Last Name | SSN | Birth Date | Phone | Address | City | State |
|------|------------|-----------|-------------|------------|------------|------------------|-------|-------|
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | 123 TESTING LANE | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | DUMMY | TEST | 111-11-1111 | 01/01/1958 | 4075551212 | 123 ANY STREET | TAMPA | FL |
| Edit | PATIENT6 | AXIOM | 111-11-1111 | 01/01/1995 | 3525455650 | 1234 TEST STREET | TAMPA | FL |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
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| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |
| Edit | PATIENT | SAMPLE | 123-45-6789 | 01/01/1901 | | | | |

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.



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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



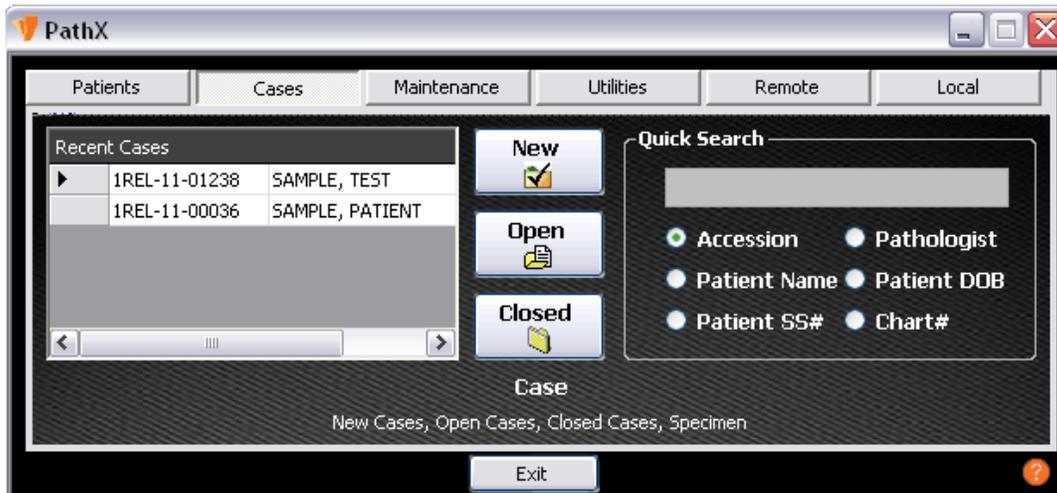
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Pathology


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Laboratory Information System™

CASES
MODULE

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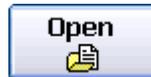
CHAPTER 2: CASES MODULE



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.

pathx

ESTABLISHING A NEW CASE

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**.

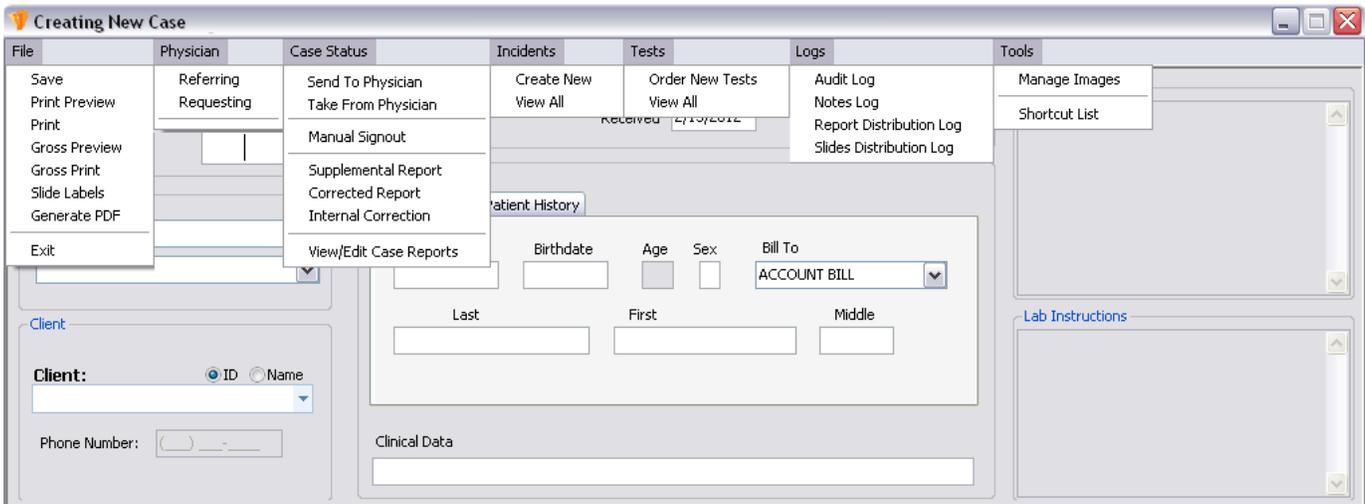
NAVIGATING THE CASE FILE MENU

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.

NAVIGATING THE CASE FILE MENU



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.

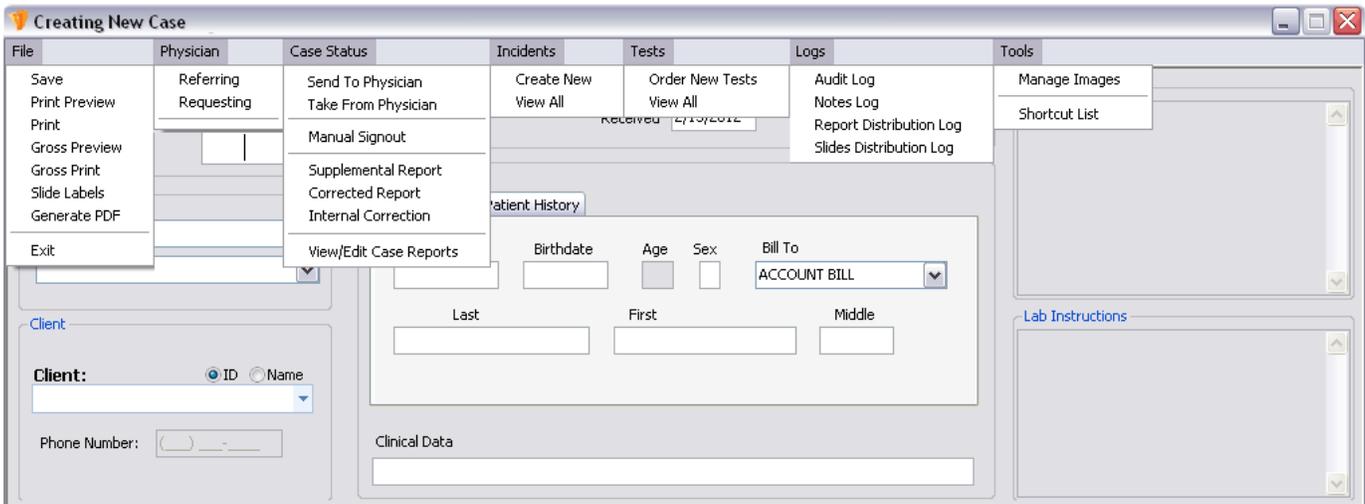
3. Case Status:

- **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 SISX 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.

ORDERING TESTS FOR EXISTING SPECIMENS

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.

New Test Order

Case Information

Accession: IREL-10-19081 Req.Physician: DR. M.D. (Phone: 813-555-5555)
Patient: SAMPLE, PATIENT (M, 109) Client: Sample Client 10

Test Ordering

1. Select Specimen, Block(s) and Tests 2. Review your selections and click Save when done

Specimen: 1 VRB Save

Block(s):

Tests

- Additional Sections
 - Additional Tissue (blocks)
 - Cut Thru
 - Decals
 - Deepers
 - Re-Embed
 - Recut
 - Recut as Original (don't go deeper)
 - Unstained
- Infectious Agents
 - AFB
 - Diff Quik - INF
 - Fite's Stain
 - Jenner's Giemsa
 - GMS
 - Gram Stain
 - GSA (ONLY FOR DIAGNOSTIC CLINI
 - PAS/Fungus
 - PCP/Pneumocystis
 - Steiner
 - Warthin-Starry
 - Wright Stain
- Chemical Stains
 - Alcian Blue/PAS
 - Alcian Blue/pH2.5
 - Colloidal Iron
 - Congo Red
 - Diff Quik - Mast Cell
 - Fontana Masson
 - Iron Stain
 - Masson's Trichrome
 - Melanin Bleach
 - Mucicarmine
 - Oil Red O
 - One Step Trichrome
 - PAS/DIAS
 - PAS/H&E

| Block(s) | Test | Slide Count | Units to Bill | Location | Re-do | Requested By | Send To |
|----------|------|-------------|---------------|----------|-------|--------------|---------|
|----------|------|-------------|---------------|----------|-------|--------------|---------|

APPLYING ICD-9 CODING

| Specimen No | ICD9 & SummaryDiag | ICD9Type | Primary Diagnosis |
|---|--|-----------|-------------------------------------|
| 1 | 172.0 - Skin of Lip - Malignant Melanoma | Diagnosis | <input type="checkbox"/> |
| 2 | 172.6 - Upper Limb Including Shoulder - Malignant Melanoma | Diagnosis | <input type="checkbox"/> |
| 3 | 232.4 - Scalp and Skin of Neck - Carcinoma in Situ | Diagnosis | <input type="checkbox"/> |
| * Click here to add a new record... | | | <input checked="" type="checkbox"/> |

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.

APPLYING CPT CODING & BILLING DATA

| Specimen N | CPT Code & Description | Modifier | Units | Fee Amount | Vendor | Fee Type | Bill By |
|-------------------------------------|--------------------------|----------|-------|------------|----------|----------------------|----------|
| 1 | 88305 - SURG PATH LEV IV | | 2 | \$175.00 | Reliance | Insurance Global Fee | Specimen |
| * Click here to add a new record... | | | | | | | |

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

CREATING AND/OR EDITING INCIDENTS

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 screenshot shows a web browser window titled "Incident" with a "Save" button in the top right corner. The form is divided into two main sections: "Case Information" and "Incident Detail".

Case Information

Accession: 1REL-11-00036

Client: 10 - Sample Client 10 **Phone:** (813) 977-8550

Patient Name: SAMPLE, PATIENT

SS#: 123-45-6789 **DOB:** 1/1/1901 **Age:** 110 **Sex:** M

Incident Detail

Created On: Now **Created By:** christopher hazelwood

Incident Type: Block empty, tissue did not survive processing

Specimen Site/Test Affected: [Text Input Field]

Person Reporting Error: [Text Input Field]

Client Notified

Specimen Returned

Verbal Correction Accepted

Tissue Processed

Person Contacted at Client's Office: [Text Input Field]

Statement of Facts: [Text Area]

Results/Outcome: [Text Area]

Person Directly Responsible (if known): [Text Input Field] **Title:** [Text Input Field]

Follow up Comments: [Text Area]

OPENING EXISTING CASES

The **Open** Case command within the **Cases Module** allows users the ability to access cases that were previously recorded in the system and can be viewed in list format on the **Browse Cases** Screen; if relevant case data is known, the end user can expedite the process by utilizing the **Quick Search** function.

The screenshot shows the 'Browse Cases' application window. On the left is a 'Search Criteria' panel with various filters. On the right is a table of cases with columns for View, Patient, Accession Number, Collected Date, Received Date, Reported Date, and Case Status. The status column contains various labels like 'Pending Clinical Data', 'Pending SignOut', 'Pending Specimens', and 'Ready for Pathologist'.

| View | Patient | Accession Number | Collected Date | Received Date | Reported Date | Case Status |
|------|---------|------------------|----------------|---------------|---------------|-----------------------|
| View | Patient | IREL-11-01238 | 1/1/1900 | 1/1/1900 | | Pending Clinical Data |
| View | Patient | IREL-11-01160 | 1/1/2011 | 1/1/2011 | | Pending SignOut |
| View | Patient | IREL-11-01179 | 1/1/2011 | 1/1/2011 | | Pending SignOut |
| View | Patient | IREL-11-01236 | 1/1/2011 | 1/1/2011 | | Pending SignOut |
| View | Patient | IREL-11-00020A | 2/10/2011 | 2/10/2011 | | Pending Supplementa |
| View | Patient | IREL-11-00021 | 2/11/2011 | 2/11/2011 | | Pending Gross |
| View | Patient | IREL-11-00022 | 2/15/2011 | 2/15/2011 | | Pending CPT Codes |
| View | Patient | 1WPC-11-00002 | 2/23/2011 | 2/23/2011 | | Pending Specimens |
| View | Patient | IREL-11-00026 | 2/24/2011 | 2/24/2011 | | Pending Gross |
| View | Patient | IREL-11-00027 | 2/28/2011 | 2/28/2011 | | Pending Gross |
| View | Patient | IREL-11-00028 | 3/3/2011 | 3/3/2011 | | Pending CPT Codes |
| View | Patient | IREL-11-00029 | 3/3/2011 | 3/3/2011 | | Pending Gross |
| View | Patient | 2REL-11-00008 | 3/3/2011 | 3/3/2011 | | Pending Pathologist |
| View | Patient | IREL-11-00030 | 3/14/2011 | 3/14/2011 | | Pending CPT Codes |
| View | Patient | IREL-11-00031 | 3/21/2011 | 3/21/2011 | | Pending Gross |
| View | Patient | IREL-11-00032 | 3/21/2011 | 3/21/2011 | | Pending Gross |
| View | Patient | IREL-11-00033 | 3/21/2011 | 3/21/2011 | | Pending CPT Codes |
| View | Patient | IREL-11-00034 | 2/4/2011 | 3/22/2011 | | Pending Gross |
| View | Patient | IREL-11-00035 | 3/22/2011 | 3/22/2011 | | Pending Clinical Data |
| View | Patient | 2REL-11-00009 | 9/14/2010 | 3/22/2011 | | Pending CPT Codes |
| View | Patient | 1PRO-11-00001A | 4/3/2011 | 4/3/2011 | | Pending CPT Codes |
| View | Patient | 1PRO-11-00002A | 4/4/2011 | 4/4/2011 | | Pending CPT Codes |
| View | Patient | IREL-11-00036 | 4/10/2011 | 4/13/2011 | | Ready for Pathologist |
| View | Patient | 1WPC-11-00004A | 4/25/2011 | 4/25/2011 | | Ready for Pathologist |
| View | Patient | 1WPC-11-00005 | 4/28/2011 | 4/28/2011 | | Pending CPT Codes |

Cases found: 220

The 'Quick Search' dialog box contains a search input field and several radio button options for search criteria:

- Accession
- Pathologist
- Patient Name
- Patient DOB
- Patient SS#
- Chart#

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.

EDITING EXISTING SPECIMEN DATA

The screenshot displays the 'Specimens' window in the pathx software. The interface includes a toolbar with 'Auto-Corrects', 'Add Specimen', 'Delete Specimen', and 'CPT' buttons, along with a 'Save' button. The 'Case Information' section shows: Accession: 1REL-10-19081, Patient: SAMPLE, PATIENT (M, 109), Clinical Data: NEW CASE FOR TESTING..., Req.Physician: DR. EUGENE A WARD, M.D. (Phone: 813-972-1654), and Client: Sample Client 10. The 'Specimen 1' section contains dropdown menus for 'Organ' (Skin), 'Description' (DESCR SPEC 1), 'Procedure' (Shave), and 'CPT' (88305). Below these are three text areas: 'Gross Description', 'Microscopic Description' (with a 'Use as Image Caption' checkbox), and 'Diagnosis' (with a 'Positive' checkbox). At the bottom of this section are input fields for 'BLOCKS Cut: 1' and 'H&E Slides: 2'. On the right side, there are two panels: 'Images' (showing 'Images: 0 Found' and a 'Capture Image' button) and 'Lab Work' (with an 'Add AFS' button and a table for section counts).

| Section | Slides |
|---------------------------|--------|
| Frozen Section | 0 |
| Frozen Section Additional | 0 |
| Permanent | 0 |

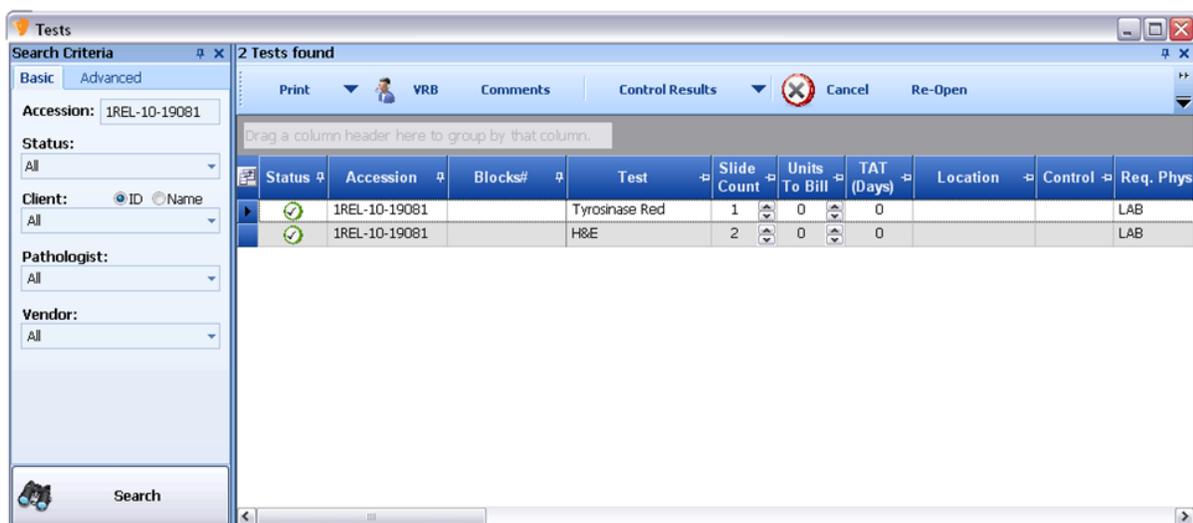
Within the **Case Currently Open For Editing** Screen, users have the ability to view and/or edit the specimen(s) that have been assigned to the case by selecting **View**. The **Specimens** Screen will then detail each of the following: Organ Type, Description of Specimen, Procedure Performed and CPT 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.

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VIEWING TESTS PREVIOUSLY PERFORMED

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.



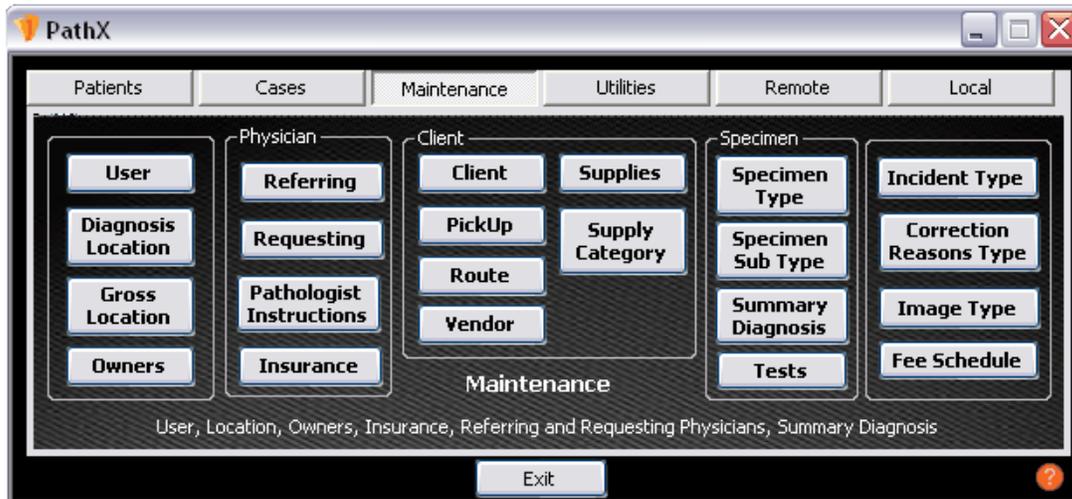
The screenshot displays the 'Tests' window in the pathx Laboratory Information System. The window is divided into a 'Search Criteria' sidebar on the left and a main table area on the right. The search criteria include fields for Accession (IREL-10-19081), Status (All), Client (ID/Name), Pathologist (All), and Vendor (All). The main table shows 2 tests found for the specified accession. The table has columns for Status, Accession, Blocks#, Test, Slide Count, Units To Bill, TAT (Days), Location, Control, and Req. Phys. The first test is Tyrosinase Red with a slide count of 1, and the second is H&E with a slide count of 2. Both tests are located in the LAB and have a TAT of 0 days.

| Status | Accession | Blocks# | Test | Slide Count | Units To Bill | TAT (Days) | Location | Control | Req. Phys |
|--------|---------------|---------|----------------|-------------|---------------|------------|----------|---------|-----------|
| ✓ | IREL-10-19081 | | Tyrosinase Red | 1 | 0 | 0 | | | LAB |
| ✓ | IREL-10-19081 | | H&E | 2 | 0 | 0 | | | LAB |

MAINTENANCE

MODULE





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.

The screenshot shows the 'User Maintenance' window with the following sections:

- User Section:** Username, Role (Administrator), Active checkbox, First Name, Middle Ini, Last Name, Initials, and Email fields.
- Pathologist Info Section:** Suffix, Fee (0.00), Dictate Diagnosis checkbox, Max. Quota Specimens x Day, Credentials, and Work Location dropdown.
- System Permissions Section:** A list of checkboxes for various permissions:
 - System Permissions:** Login, Cases (Edit Cases, Enter Case Notes, Send to Physician, Take from Physician, Create Corrected Report, Create Internal Correction, Create Supplemental Report, Modify Supplemental Text, Manual Signout), Edit Specimens, Add Specimens, Delete Specimens.
 - Physician:** Local, Remote, Take Pictures, Signout Cases.
 - Patient:** All, Edit Patients, Patient Insurance.
 - CPT:** Add CPT, Delete CPT, Change CPT.
 - Maintenance:** All, Users, Physicians, Insurance, Fee Schedule.
 - Other:** Generate PDF, Auto-Corrects, Close Incidents, Report Distribution, Delete Copy-To, Utilities.
 - Lookup:** Lookup checkbox.
- Buttons:** New and Update buttons at the bottom right.

MANAGING DIAGNOSIS LOCATIONS

2. By Selecting the **Diagnosis Location** Button within the Maintenance Module, the window below appears, listing all locations in PathX.

| | ID | Location Name | CLIA_NameLocation | CLIA Number |
|--------|----|---------------|-------------------|-------------|
| ▶ Edit | 4 | | | |
| Edit | 7 | | | |
| Edit | 15 | | | |
| Edit | 12 | | | |
| Edit | 22 | | | |
| Edit | 9 | | | |
| Edit | 11 | | | |
| Edit | 6 | | | |
| Edit | 1 | | | |
| Edit | 13 | | | |
| Edit | 10 | | | |
| Edit | 8 | | | |
| Edit | 22 | | | |

- 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**.

Location

Location Information

Location Name:

Additional Footer Text:

Footer Text:

CLIA Number:

Phone:

Save Location

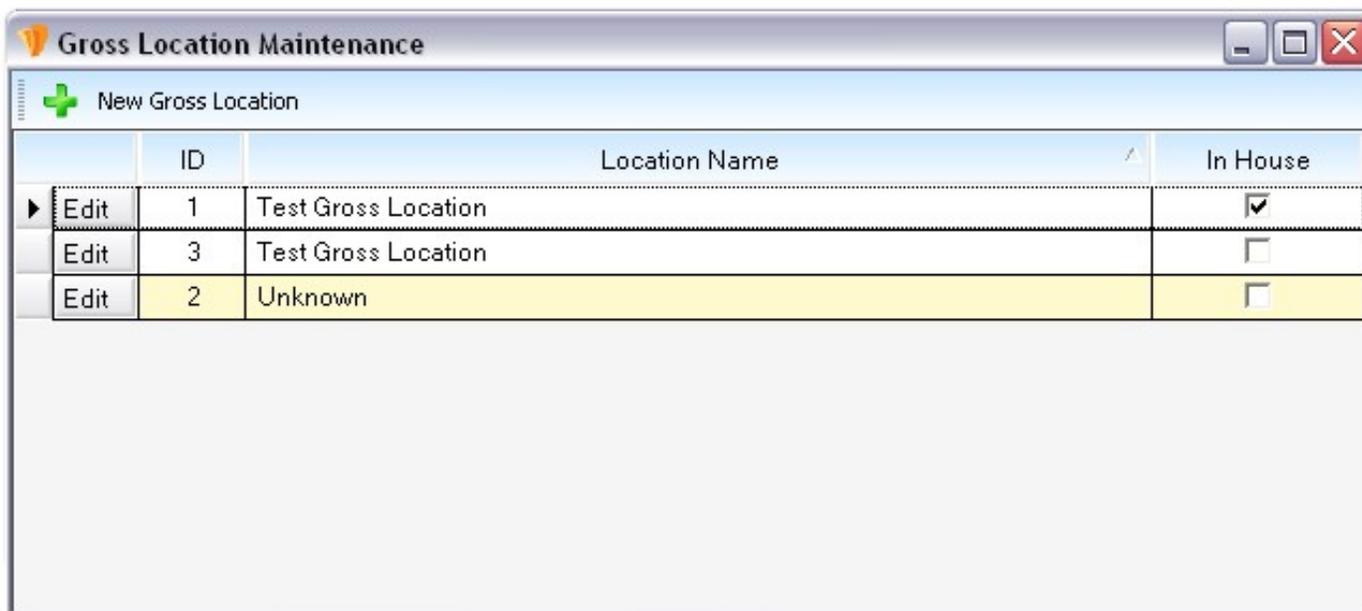
Clear Fields

Note: If user selects **Edit**, the **Save Location** button will display **Update Location**.

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MANAGING GROSS LOCATIONS

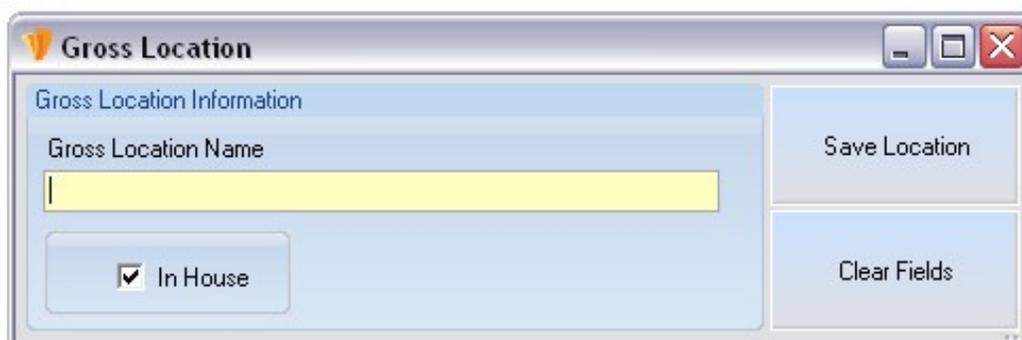
3. By Selecting the **Gross Location** Button within the Maintenance Module, the **Gross Location Maintenance** window below appears, listing all gross locations within PathX.



The screenshot shows a window titled "Gross Location Maintenance" with a toolbar containing a green plus icon and the text "New Gross Location". Below the toolbar is a table with the following data:

| | ID | Location Name | In House |
|--------|----|---------------------|-------------------------------------|
| ▶ Edit | 1 | Test Gross Location | <input checked="" type="checkbox"/> |
| Edit | 3 | Test Gross Location | <input type="checkbox"/> |
| Edit | 2 | Unknown | <input type="checkbox"/> |

- To add a new Gross Location, click **New Gross Location**, located on the tool bar.
- 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**.

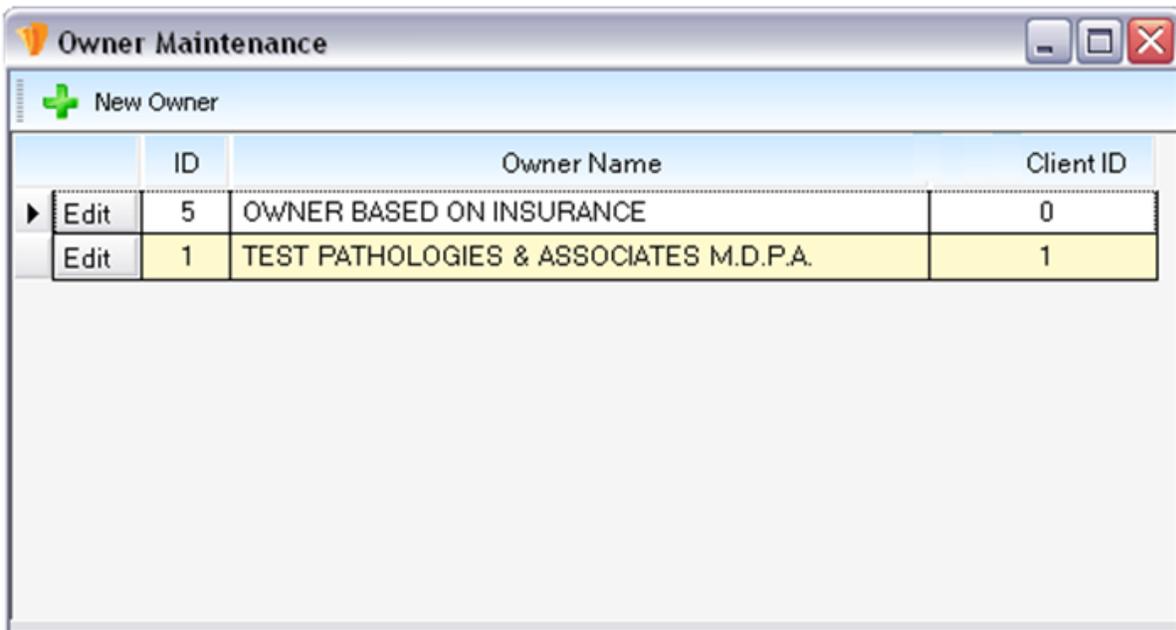


The screenshot shows a window titled "Gross Location" with a "Gross Location Information" section. It contains a text input field for "Gross Location Name" and a checkbox labeled "In House" which is checked. To the right of the input field are two buttons: "Save Location" and "Clear Fields".

Note: If user selects **Edit**, the **Save Location** button will display **Update Location**.

CREATING & EDITING OWNERS

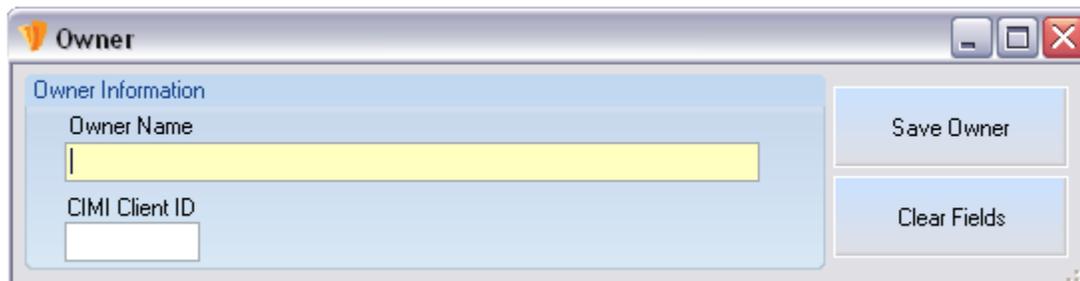
4. By Selecting the **Owners** Button within the Maintenance Module, the **Owner Maintenance** window, as seen below, will appear displaying all owner information.



The screenshot shows a window titled "Owner Maintenance" with a toolbar containing a green plus icon and the text "New Owner". Below the toolbar is a table with the following data:

| | ID | Owner Name | Client ID |
|--------|----|--|-----------|
| ▶ Edit | 5 | OWNER BASED ON INSURANCE | 0 |
| Edit | 1 | TEST PATHOLOGIES & ASSOCIATES M.D.P.A. | 1 |

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**.



The screenshot shows a window titled "Owner" with a section labeled "Owner Information". It contains two input fields: "Owner Name" (highlighted in yellow) and "CIMI Client ID". To the right of the input fields are two buttons: "Save Owner" and "Clear Fields".

Note: If user selects **Edit**, the **Save Owner** button will display **Update Owner**.

CREATING & EDITING REFERRING PHYSICIANS

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**

The screenshot shows the 'Referring Physician Maintenance' window. On the left, there is a 'Search Criteria' section with two tabs: 'Main' and 'Address'. The 'Main' tab is active and contains search fields for 'Last Name', 'First Name', 'NPI', and 'Active' (a dropdown menu set to 'All'). A 'Search' button is located below these fields. A note at the bottom left of the search criteria section states: '* Entry accepts partial matching search'. The main area of the window displays a table of existing referring physicians with the following columns: ID, Last Name, First Name, Middle, Suffix, and Address. The table contains 25 rows of data, each with an 'Edit' button to its left.

| | ID | Last Name | First Name | Middle | Suffix | Address |
|------|-------|-----------|--------------|--------|--------|-------------|
| Edit | 1 | AB | AUSTIN | T | M.D. | |
| Edit | 11875 | AB | JONATHAN | O | M.D. | |
| Edit | 19706 | AB | JORGE | | M.D. | PO BOX 3352 |
| Edit | 24367 | AB | JUAN | C | M.D. | PO BOX 15 |
| Edit | 18695 | AB | RAFAEL | | M.D. | |
| Edit | 23961 | AB | RAFIK | | M.D. | |
| Edit | 31451 | AB | MICK | P | M.D. | PO BOX 2525 |
| Edit | 24727 | AB | MICK | | M.D. | |
| Edit | 5744 | AB | JOSE ROBERTO | | M.D. | |
| Edit | 17988 | AB | FERNANDO | | M.D. | |
| Edit | 30772 | AB | ISAAM | | M.D. | |
| Edit | 19324 | AB | NEAL | | M.D. | |
| Edit | 11124 | AB | RAMIRO | | M.D. | |
| Edit | 12012 | AB | YANINA | | M.D. | |
| Edit | 17418 | AB | JOSE | | M.D. | |
| Edit | 10268 | AB | SYED | | M.D. | |
| Edit | 2 | AB | NUZHAT | | M.D. | |
| Edit | 3 | AB | SAIFY | | M.D. | |
| Edit | 25081 | AB | MOHAMMAD | | M.D. | |
| Edit | 26035 | AB | HAMIDREZA | | M.D. | |
| Edit | 14672 | AB | PATRICIA | | M.D. | |
| Edit | 17595 | AB | LILIAN | | M.D. | |
| Edit | 4322 | AB | LIONEL | | M.D. | |

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).

CREATING & EDITING REFERRING PHYSICIANS

Referring Physician

Referring Physician Information

First Name
[Text Field]

Last Name Middle Suffix
[Text Field] [Text Field] [Text Field]

NPI
[Text Field]

Address

Address
[Text Field]

City State Zip Code
[Text Field] [Text Field] [Text Field]

Contact Information

Phone
[Text Field]

Fax
[Text Field]

Fax Start Date
[Text Field]

Active

Save Referring Physician

Clear Fields

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**.

MANAGING REQUESTING PHYSICIANS

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**.

| | ID | Last Name | First Name | Middle | Suffix | Address |
|------|------|-----------|------------|--------|--------|-------------|
| Edit | 143 | AB | PATRICK | | M.D. | |
| Edit | 235 | AB | MOHAMED | | M.D. | |
| Edit | 894 | AB | CESAR | R | M.D. | |
| Edit | 861 | AB | IVAN | | M.D. | |
| Edit | 1031 | AB | KAREN | | M.D. | |
| Edit | 237 | AB | SALIM | | M.D. | |
| Edit | 238 | AB | RAYMOND | | M.D. | PO BOX 2552 |
| Edit | 690 | AB | DENNIS | | M.D. | |
| Edit | 544 | AB | PETER | | M.D. | |
| Edit | 453 | AB | JOSEPH | R | M.D. | |
| Edit | 583 | AB | LUIS | A | M.D. | |
| Edit | 239 | AB | WILFRED | | M.D. | |
| Edit | 597 | AB | YESHITILA | | M.D. | |
| Edit | 878 | AB | YESHITILA | | M.D. | |
| Edit | 831 | AB | LOYE | | M.D. | |
| Edit | 701 | AB | SALMA | | D.O. | |
| Edit | 144 | AB | PAUL | | M.D. | |
| Edit | 12 | AB | PAUL | R | M.D. | |
| Edit | 891 | AB | MICHAEL | | M.D. | |
| Edit | 1101 | AB | MARILYN | | | |
| Edit | 1008 | AB | YASIR | | M.D. | |
| Edit | 266 | AB | YASIR | | M.D. | |
| Edit | 560 | AB | SYED | | M.D. | |

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

The screenshot shows a web-based form titled "Requesting Physician". It is organized into two main columns. The left column, titled "Requesting Physician Information", contains the following fields: "First Name" (a long text input), "Last Name" (a long text input), "Middle" (a small text input), "Suffix" (a small text input), "NPI" (a text input), and "Address" (a long text input). Below the "Address" field are three smaller text inputs for "City", "State", and "Zip Code". The right column, titled "Contact Information", contains "Phone" and "Fax" (both text inputs), a checkbox labeled "Active" which is checked, and two buttons: "Save Requesting Physician" and "Clear Fields". The form has a standard window border with minimize, maximize, and close buttons in the top right corner.

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**



- 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**.

MANAGING INSURANCE CARRIERS

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.

The screenshot shows the 'Insurance Maintenance' window with the following components:

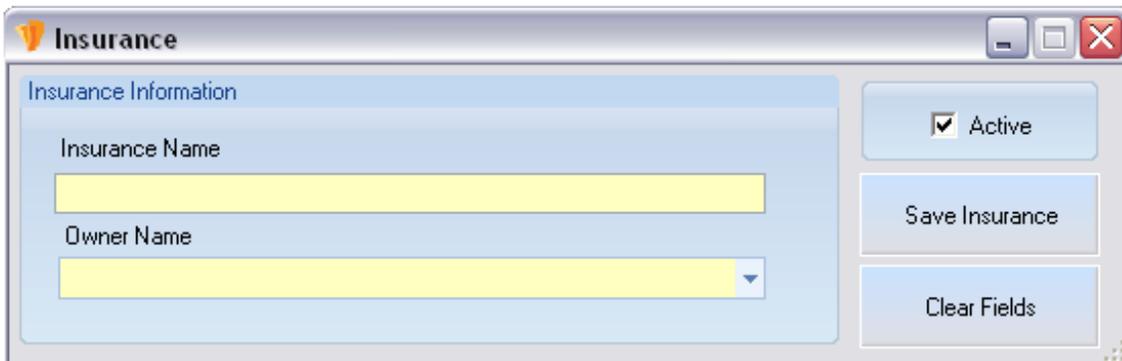
- Buttons:** '+ New Insurance' and '+ New Insurance Address' at the top left.
- Search Criteria Panel (Left):**
 - Tabs: 'Main' (selected) and 'Address'.
 - Insurance Name: Text input field with a search icon.
 - Owner Name: Dropdown menu with 'All' selected.
 - Active: Dropdown menu with 'All' selected.
 - Search: Button at the bottom.
 - Footnote: '* Entry accepts partial matching search'.
- Table (Main):**

| | ID | Insurance Name | Owner Name | Active |
|------|-----|----------------|------------------------------------|-------------------------------------|
| Edit | 151 | AAA | TEST PATHOLOGIES & ASSOCIATES M.D. | <input checked="" type="checkbox"/> |
| Edit | 44 | AARP | TEST PATHOLOGIES & ASSOCIATES M.D. | <input type="checkbox"/> |
| Edit | 152 | ABC | TEST PATHOLOGIES & ASSOCIATES M.D. | <input checked="" type="checkbox"/> |
| Edit | 153 | ABC INSURANCE | TEST PATHOLOGIES & ASSOCIATES M.D. | <input checked="" type="checkbox"/> |
| Edit | 23 | ABC | TEST PATHOLOGIES & ASSOCIATES M.D. | <input checked="" type="checkbox"/> |
| Edit | 22 | AAA | TEST PATHOLOGIES & ASSOCIATES M.D. | <input type="checkbox"/> |
| Edit | 108 | ABC | TEST PATHOLOGIES & ASSOCIATES M.D. | <input type="checkbox"/> |
| Edit | 125 | AAA | TEST PATHOLOGIES & ASSOCIATES M.D. | <input checked="" type="checkbox"/> |
| Edit | 2 | ABC | TEST PATHOLOGIES & ASSOCIATES M.D. | <input checked="" type="checkbox"/> |
| Edit | 123 | AAA | TEST PATHOLOGIES & ASSOCIATES M.D. | <input type="checkbox"/> |
| Edit | 17 | AIG | TEST PATHOLOGIES & ASSOCIATES M.D. | <input type="checkbox"/> |
| Edit | 18 | AAA | TEST PATHOLOGIES & ASSOCIATES M.D. | <input checked="" type="checkbox"/> |
| Edit | 142 | ABC | TEST PATHOLOGIES & ASSOCIATES M.D. | <input checked="" type="checkbox"/> |
| Edit | 32 | AAA | TEST PATHOLOGIES & ASSOCIATES M.D. | <input type="checkbox"/> |
| Edit | 3 | ABC | TEST PATHOLOGIES & ASSOCIATES M.D. | <input type="checkbox"/> |
| Edit | 53 | AAA | TEST PATHOLOGIES & ASSOCIATES M.D. | <input type="checkbox"/> |
- Address Section (Bottom):**
 - Message: 'There are no records at this time'.
 - Table Headers: ID, Address, City, State, ZipCode, Active.

MANAGING INSURANCE CARRIERS

Insurance Information

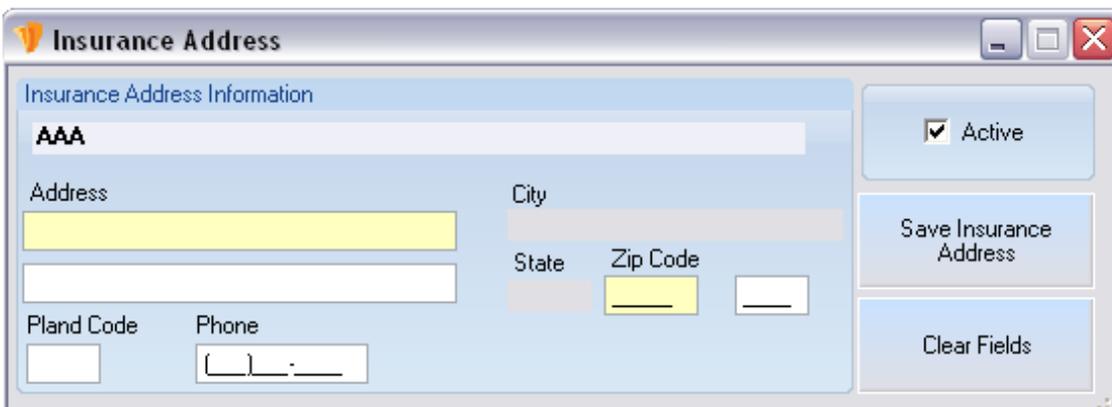
- To add a new insurance, click on **New Insurance**, located on the top tool bar in the **Insurance Maintenance** Screen.
- User must enter insurance name, and select owner name from the drop down list.
- To save the screen information, click on **Save Insurance**.
- To edit an insurance click on the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



The screenshot shows a window titled "Insurance" with a sub-header "Insurance Information". On the left, there are two input fields: "Insurance Name" (a text box) and "Owner Name" (a dropdown menu). On the right, there is a "Active" checkbox with a checkmark, a "Save Insurance" button, and a "Clear Fields" button.

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**.



The screenshot shows a window titled "Insurance Address" with a sub-header "Insurance Address Information". On the left, there are several input fields: "AAA" (a text box), "Address" (a text box), "City" (a text box), "State" (a text box), "Zip Code" (a text box), "Pland Code" (a text box), and "Phone" (a text box). On the right, there is an "Active" checkbox with a checkmark, a "Save Insurance Address" button, and a "Clear Fields" button.

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.

Insurance Maintenance

+ New Insurance

Search Criteria

Main Address

Insurance Name *

Owner Name

All

Active

All

Insurance Maintenance

+ New Insurance

Search Criteria

Main Address

Address *

City

State

All

ZipCode

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.

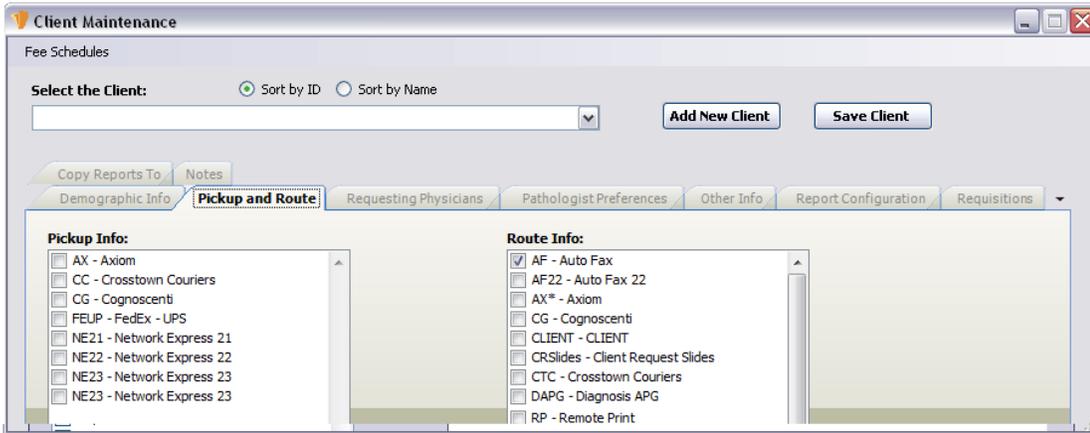
CREATING & EDITING CLIENTS

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.

The screenshot shows the 'Client Maintenance' window with the following elements:

- Fee Schedules:** A section at the top left.
- Select the Client:** Includes radio buttons for 'Sort by ID' (selected) and 'Sort by Name', and a search dropdown menu.
- Buttons:** 'Add New Client' and 'Save Client' buttons.
- Navigation Tabs:** 'Copy Reports To', 'Notes', 'Demographic Info' (active), 'Pickup and Route', 'Requesting Physicians', 'Pathologist Preferences', 'Other Info', 'Report Configuration', and 'Requisitions'.
- Demographic Info Tab:**
 - Client ID:** Text input field.
 - Client Name:** Text input field.
 - Client Name 2:** Text input field.
 - Friendly Name:** Text input field.
 - Specialty:** Dropdown menu.
 - Client Address:**
 - Address 1: Text input field.
 - Address 2: Text input field.
 - City: Text input field.
 - State: Text input field.
 - Zip Code: Text input field.
 - Contact Info:**
 - Contact Name: Text input field.
 - Phone Number: Text input field with format () - -.
 - Fax: Text input field with format () - -.
 - Sales Rep.: Dropdown menu.

CREATING & EDITING CLIENTS



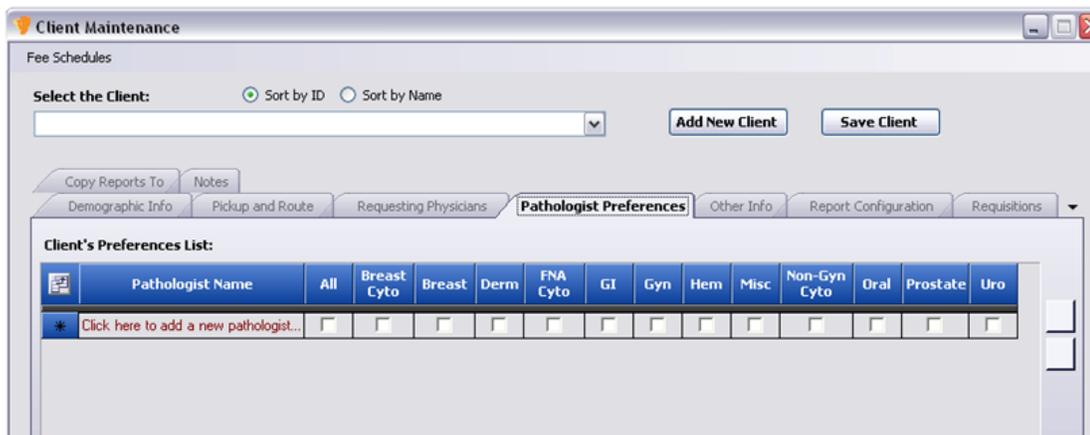
Pickup and Route Tab

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 utilizing this tab.



Pathologist Preference Tab

On this tab, clients can request preferred pathologists to assign to their cases.

CREATING & EDITING CLIENTS

Client Maintenance

Fee Schedules

Select the Client: Sort by ID Sort by Name

Copy Reports To: Notes

Demographic Info | Pickup and Route | Requesting Physicians | Pathologist Preferences | **Other Info** | Report Configuration | Requisitions

Active Lock Box Client Of: Test Lab, LLC

Account Bill Requesting Copy Of Slides Slide Prep Report Template to Use: Standard Report

Pictures On Reports Client uses Client-Interface Mnemonic:

VIC Comarketed Account

Start Date: 11/7/2011 Office Hours:

EMR Name:

PMS Name:

Special Instructions:

Lab Instructions:

Pathologist Instructions:

| | Instructions | Additional Instructions |
|--------------------------|--|-------------------------|
| <input type="checkbox"/> | 88 | |
| <input type="checkbox"/> | PHOTOMICROGRAPH ONLY ON POSITIVE CASES | |
| <input type="checkbox"/> | PHOTOMICROGRAPH REQUIRED | |

Other Info Tab

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

Client Maintenance

Fee Schedules

Select the Client: Sort by ID Sort by Name

Copy Reports To: Notes

Demographic Info | Pickup and Route | Requesting Physicians | Pathologist Preferences | Other Info | **Report Configuration** | Requisitions

Report Distribution | Accession and Labels | Case Defaults

Courier (Enabled) False

Number of Copies: 1

Start Date:

Electronic (Enabled) False

Feed Type:

File Format:

Input Folder:

Output Folder:

Send Results: Always

Start Date:

Email (Enabled) False

Send Results: Always

Start Date:

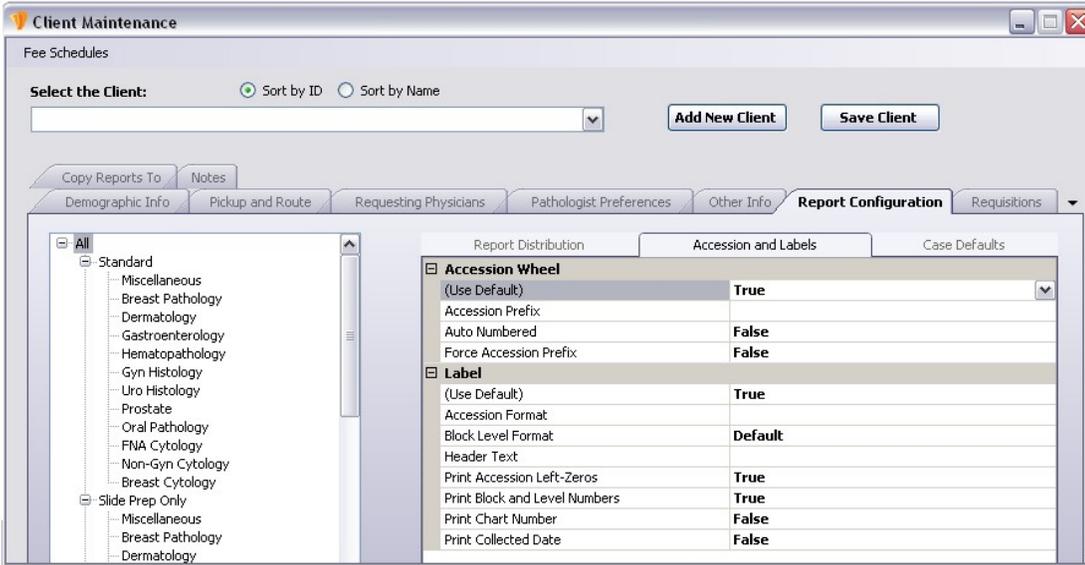
Report Configuration Tab

Detailed in Three Sub Tabs: Report Distribution, Accession and Labels, and Case Defaults.

Report Distribution Sub Tab

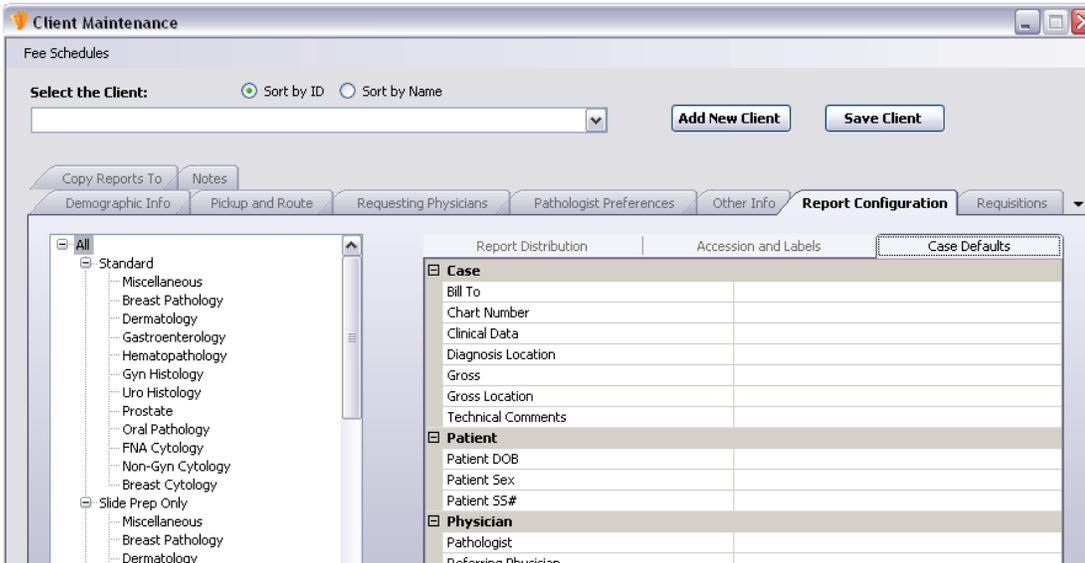
In this sub tab, client result delivery method(s) are defined. Different delivery methods can be defined at the report type level, as well.

CREATING & EDITING CLIENTS



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).

CREATING & EDITING CLIENTS

The screenshot shows the 'Client Maintenance' window with the 'Requisitions' tab selected. At the top, there are 'Fee Schedules' and 'Select the Client' options with radio buttons for 'Sort by ID' (selected) and 'Sort by Name'. Below this is a dropdown menu and two buttons: 'Add New Client' and 'Save Client'. The 'Requisitions' tab contains a section titled 'Additional Information to Print on Requisitions' with three text input fields: 'Special Instructions:', 'Insurance Info Line 1:', and 'Insurance Info Line 2:'. At the bottom of this section is a checkbox for 'Requisition Printing'.

Requisitions Tab

This tab allows the user to enter additional instructions related to a requesting physician and/or insurance company (if any).

The screenshot shows the 'Client Maintenance' window with the 'Copy Reports To' sub-tab selected. It features a checkbox for 'Copy reports to all Referring Physicians by Fax' and a 'Fax Start Date' dropdown set to '2/6/2012'. A 'Select Type of Copy-To' dialog box is open, showing radio buttons for 'Requesting Physician' (selected), 'Client', and 'Other Location'. To the right is a 'Name' dropdown menu and an 'Add Copy-To' button. Below this is a table with columns 'Target Type', 'Target Name', and 'New'. At the bottom right, there are 'Save Changes' and 'Remove Copy-To' buttons. The 'Demographic Info' sub-tab is also visible, showing fields for Name, Address, City, State, Zip Code, Phone, and Fax.

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

Client Maintenance

Fee Schedules

Select the Client: Sort by ID Sort by Name

Copy Reports To | Notes

Demographic Info | Pickup and Route | Requesting Physicians | Pathologist Preferences | Other Info | Report Configuration | Requisitions

Copy reports to all Referring Physicians by Fax Fax Start Date: 2/6/2012

Select Type of Copy-To

Requesting Physician
 Client
 Other Location

Name:

| Target Type | Target Name | New |
|-------------|-------------|-----|
| | | |

Demographic Info | **Route** | Report Distribution

Route Info

- AF - Auto Fax
- AF22 - Auto Fax 22
- DHL - DHL
- EI - Electronic Interface
- EMAIL - E-mail
- NE 21 X3 - Network Express 21
- NE 23 - Network Express 23
- NE21 - Network Express 21
- DHL - DHL
- EI - Electronic Interface
- EMAIL - E-mail
- NE 21 X3 - Network Express 21
- NE 23 - Network Express 23
- NE21 - Network Express 21

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.

Client Maintenance

Fee Schedules

Select the Client: Sort by ID Sort by Name

Copy Reports To | Notes

Demographic Info | Pickup and Route | Requesting Physicians | Pathologist Preferences | Other Info | **Report Configuration** | Requisitions

Copy reports to all Referring Physicians by Fax Fax Start Date: 2/6/2012

Select Type of Copy-To

Requesting Physician
 Client
 Other Location

Name:

| Target Type | Target Name | New |
|-------------|-------------|-----|
| | | |

Demographic Info | Route | **Report Distribution**

Email

(Enabled) **False**

Email Address

Report Format

Security Password

Start Date

Fax

(Enabled) **False**

Fax Number

Number of Copies **1**

Start Date

Remote Print

(Enabled) **False**

Number of Copies **1**

Printer Name

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

Client Maintenance

Fee Schedules

Select the Client: Sort by ID Sort by Name

10 - Sample Client 10

Copy Reports To: **Notes**

Demographic Info | Pickup and Route | Requesting Physicians | Pathologist Preferences | Other Info | Report Configuration | Requisitions

Add Note | Report

Type: Client Request

Note: Client Requests Reports Be Mailed And Faxed

Notes History

| Created Date | User Name | Type of Note | Note Text |
|---------------------|-------------|---------------|--|
| 05/04/2009 11:45 AM | Alem, Maril | Phone Log | Received phone call from this client regarding to the delay on the slides distribution lately and the changes on the courier's company. |
| 04/30/2009 06:38 PM | Alem, Maril | Email Message | Mail received from the client; this is just a testing! |
| 04/30/2009 06:19 PM | Alem, Maril | Phone Log | Client called and stated that they don't have received the reports that were signed out yesterday afternoon. It's pending for us to verified email address for reports delivery. |
| 04/29/2009 05:17 PM | Alem, Maril | Email Message | Email received from the client to include report distribution via fax. |
| 04/29/2009 05:14 PM | Alem, Maril | Phone Log | CLIENT CALLED STATING THAT THE REPORT HAS THE WRONG COLLECTION DATE AND SITE |

Notes

Add Note Sub Tab

Allows all client communications to be entered and tracked.

Client Maintenance

Fee Schedules

Select the Client: Sort by ID Sort by Name

10 - Sample Client 10

Copy Reports To: **Report**

Demographic Info | Pickup and Route | Requesting Physicians | Pathologist Preferences | Other Info | Report Configuration | Requisitions

Add Note | Report

Client: ID Name

10 - Sample Client 10

Accession:

Notes Type: All

Filter by Date

Date: Date Range

From: 01/07/2012

Thru: 02/06/2012

Notes History

| Created Date | User Name | Type of Note | Note Text |
|---------------------|-------------|---------------|--|
| 05/04/2009 11:45 AM | Alem, Maril | Phone Log | Received phone call from this client regarding to the delay on the slides distribution lately and the changes on the courier's company. |
| 04/30/2009 06:38 PM | Alem, Maril | Email Message | Mail received from the client; this is just a testing! |
| 04/30/2009 06:19 PM | Alem, Maril | Phone Log | Client called and stated that they don't have received the reports that were signed out yesterday afternoon. It's pending for us to verified email address for reports delivery. |
| 04/29/2009 05:17 PM | Alem, Maril | Email Message | Email received from the client to include report distribution via fax. |
| 04/29/2009 05:14 PM | Alem, Maril | Phone Log | CLIENT CALLED STATING THAT THE REPORT HAS THE WRONG COLLECTION DATE AND SITE |

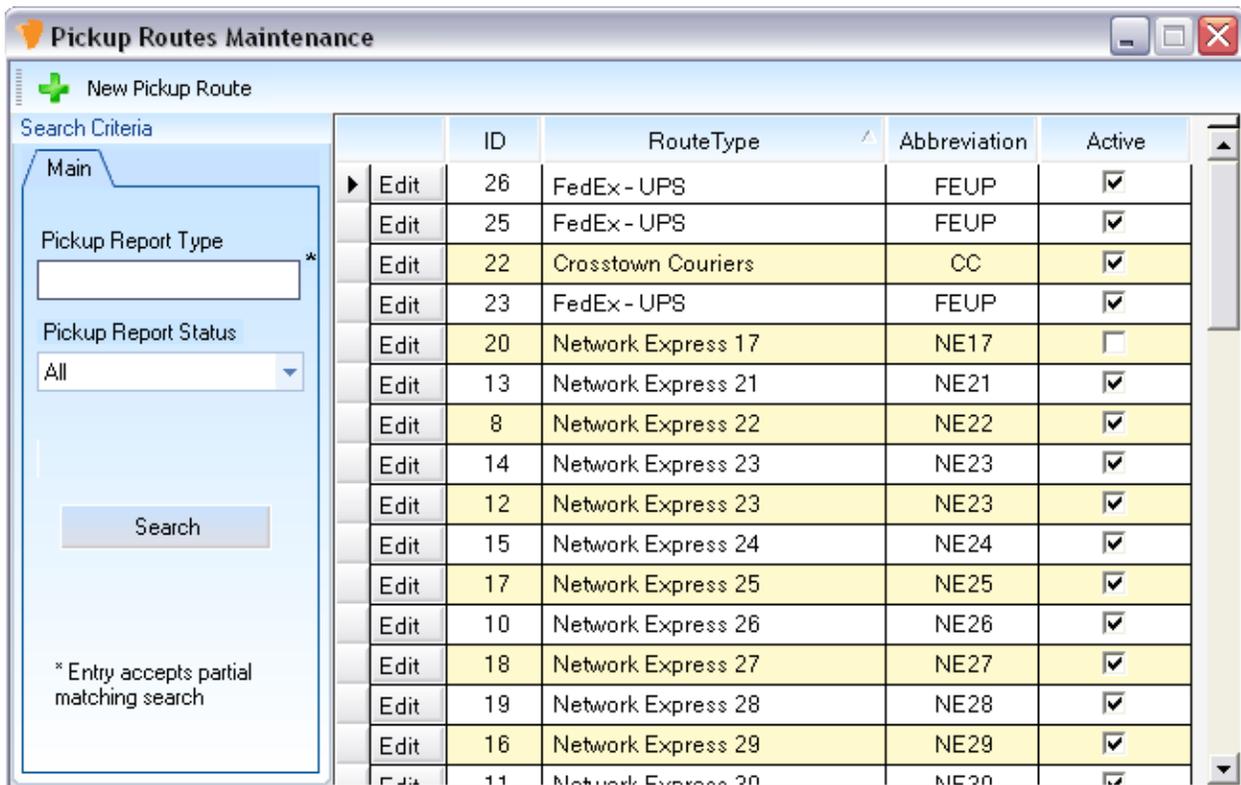
Notes

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.



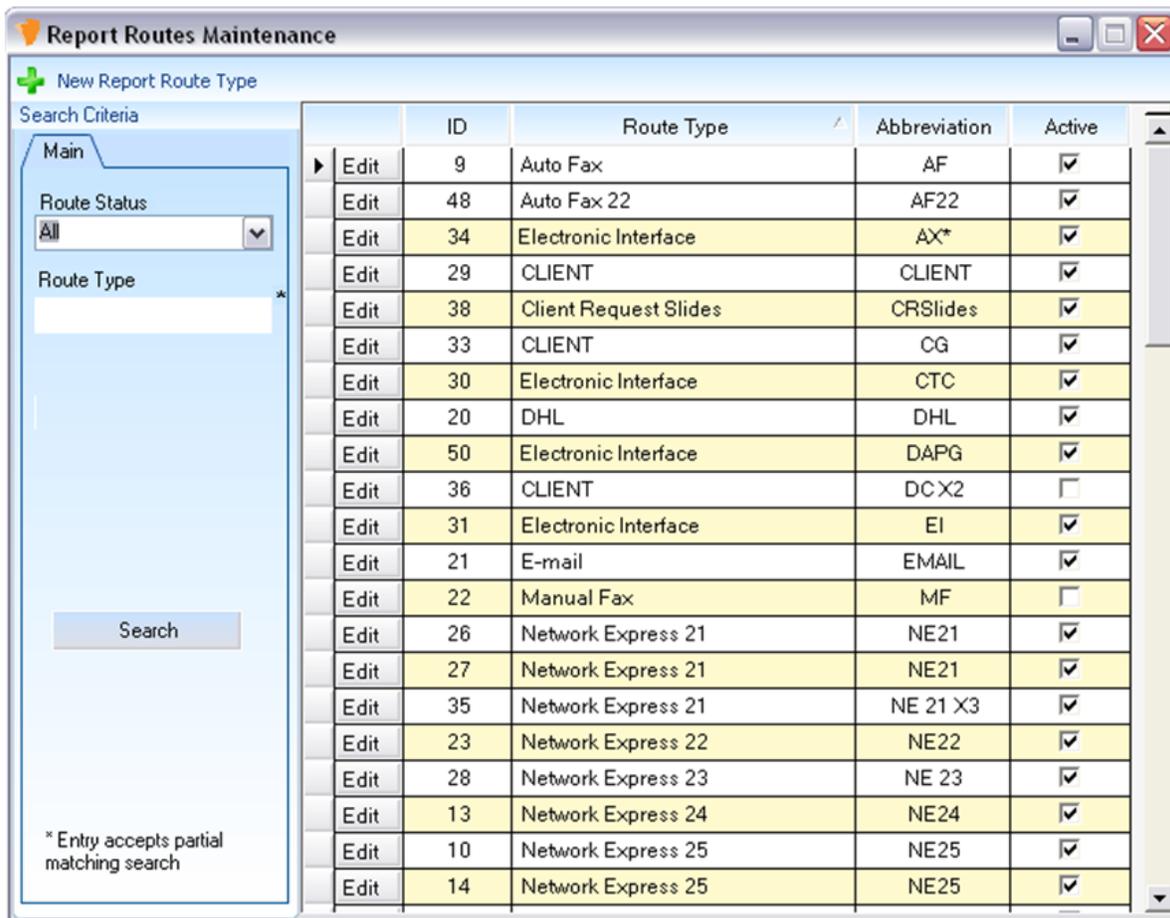
Pickup Routes

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**.

MANAGING REPORT DELIVERY METHODS

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



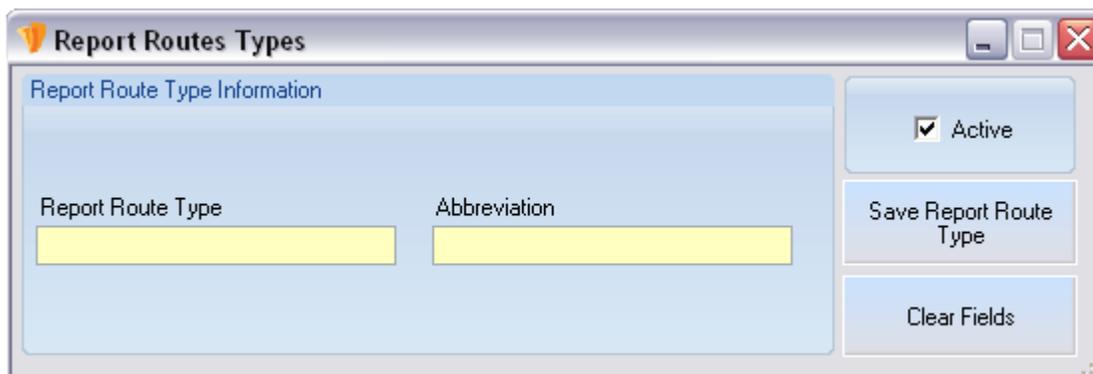
A) Searching Existing Report Routes:

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.

MANAGING REPORT DELIVERY METHODS



Report Routes Types

Report Route Type Information

Active

Report Route Type Abbreviation

Save Report Route Type

Clear Fields

B) Establishing A New Report Route:

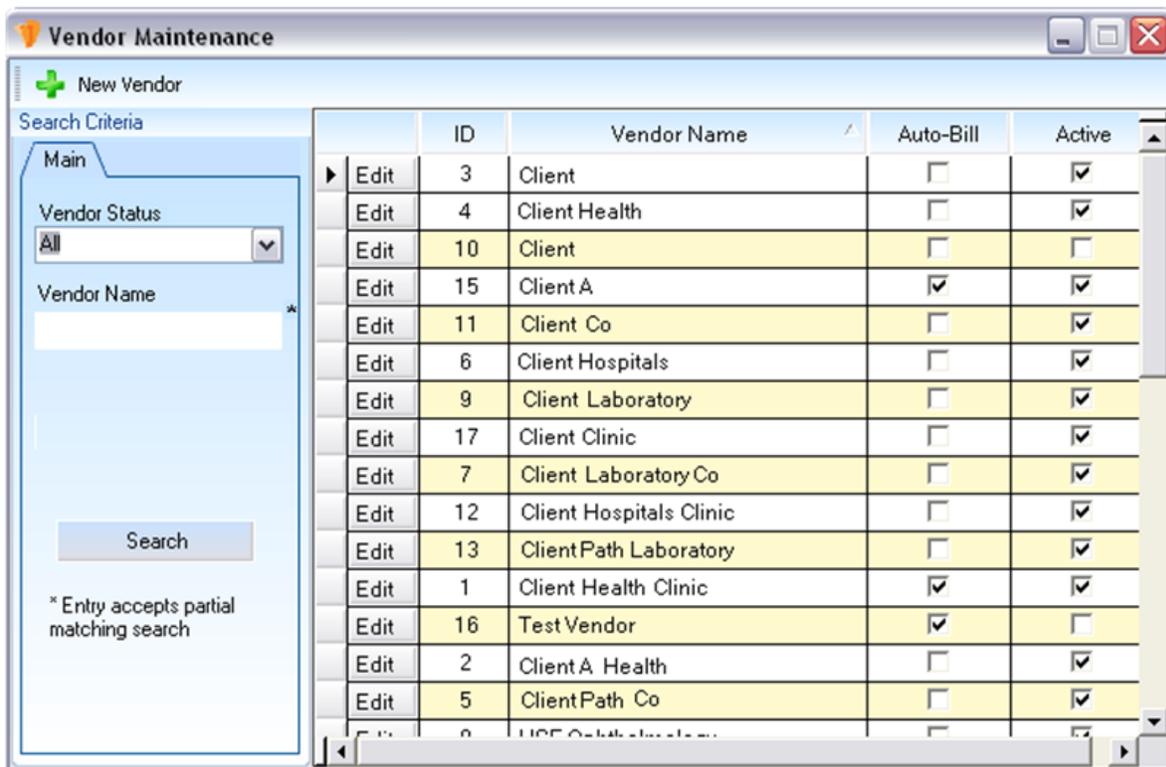
- To add a new report route type, click **New Report Route Type**, located on the top tool bar.
- Enter the report route type and its abbreviation.
- To Save the screen information, click **Save Report Route Type**.

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**.

MANAGING LAB VENDORS

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.



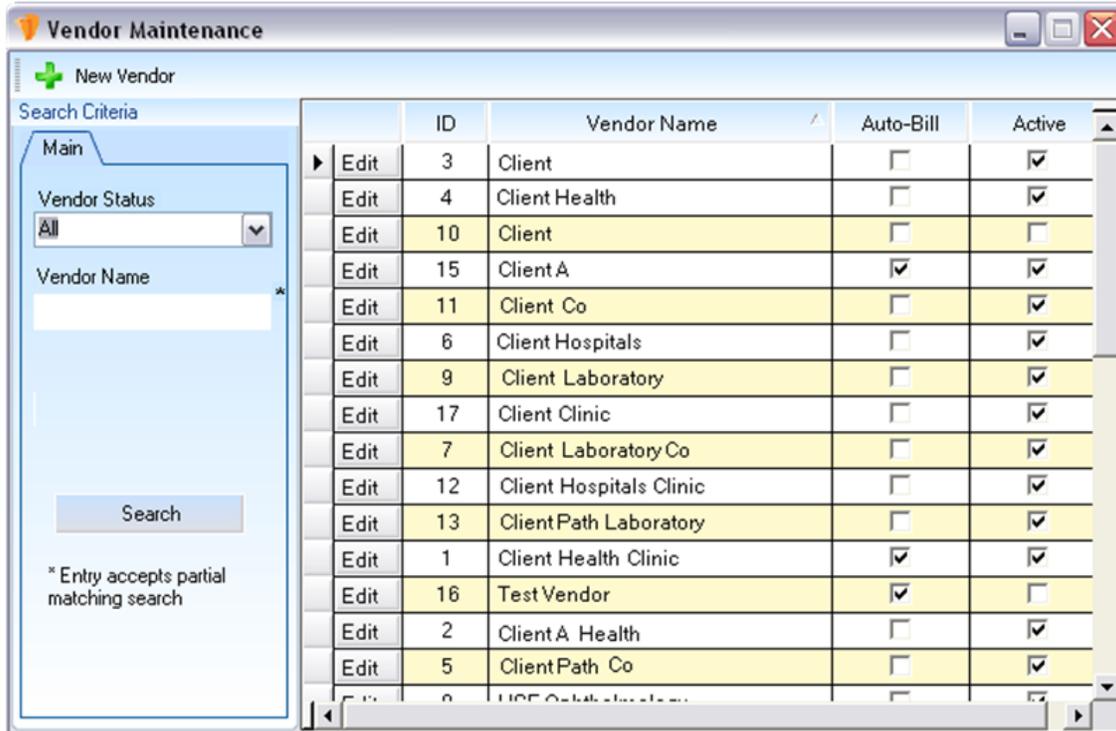
A) Searching Existing Vendors:

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:

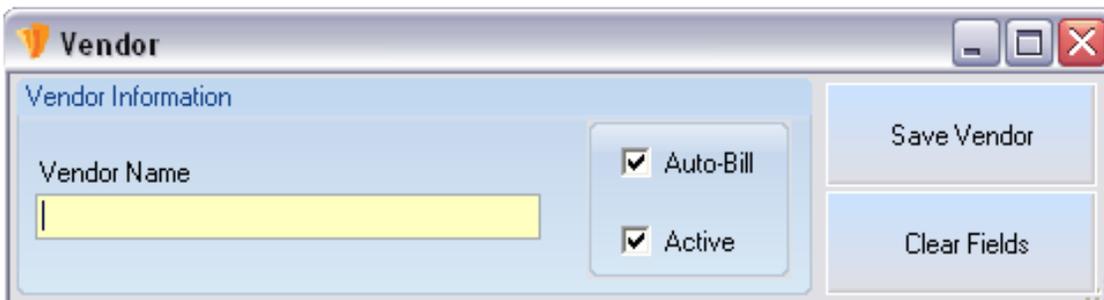
- Vendor Status – User can display “ALL”, “ACTIVE” or “NO ACTIVE” vendor(s) from the dropdown box.
- Vendor Name – Enter entire vendor name or a few characters to display all matches.

MANAGING LAB VENDORS



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**.

MANAGING LAB SUPPLIES

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.

The screenshot shows a software window titled "Supply". At the top left is the pathx logo. The window contains a form with the following elements:

- Category:** A dropdown menu.
- Description:** A text input field.
- Active:** A checked checkbox.
- Buttons:** "Add New Supply" and "Save".
- Supplies List:** A list of categories: "Histology", "Cytology", "Test Requisitions", and "Other", each preceded by a plus sign icon.
- Expand all:** A checkbox at the bottom left of the list area.

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.

The screenshot shows a software window titled "Category Supply". At the top, there is a "Category Description" text input field. To its right are two buttons: "Add New Category" and "Save". Below the text field are two checkboxes: "Is a Test Requisition" and "Active". The main area of the window is titled "Categories List" and contains a tree view. The tree view is expanded to show "All Categories", which includes four sub-items: "Cytology", "Histology", "Other", and "Test Requisitions". At the bottom left of the window, there is a checked checkbox labeled "Expand All".

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.

| | Specimen Type Name | Active |
|------|--------------------|-------------------------------------|
| Edit | Other | <input checked="" type="checkbox"/> |
| Edit | Paraffin Block | <input checked="" type="checkbox"/> |
| Edit | Slide | <input checked="" type="checkbox"/> |

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.

MANAGING SPECIMEN TYPES

Specimen Type

Report Classification

Report Type: Consultation

Report Sub-Type: Breast Cytology

Specimen Type Name: [Empty text box]

Active

Save Specimen Type

Add New Specimen Type

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.

| | Specimen Sub Type Name | CPT Code | Default | Active |
|--------|------------------------|----------|--------------------------|-------------------------------------|
| ▶ Edit | Other** | 88321 | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

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.

MANAGING SPECIMEN SUB-TYPES

Specimen Sub Type

Report Classification

Report Type: Consultation | Report Sub-Type: Breast Cytology

Specimen Type: Other | CPT Code: []

Specimen Sub Type Name: [] | Slides Per Block: 0

Active
 Default

Save Specimen Sub Type
Add New Specimen Sub Type

B) Establishing A New Specimen Sub Type:

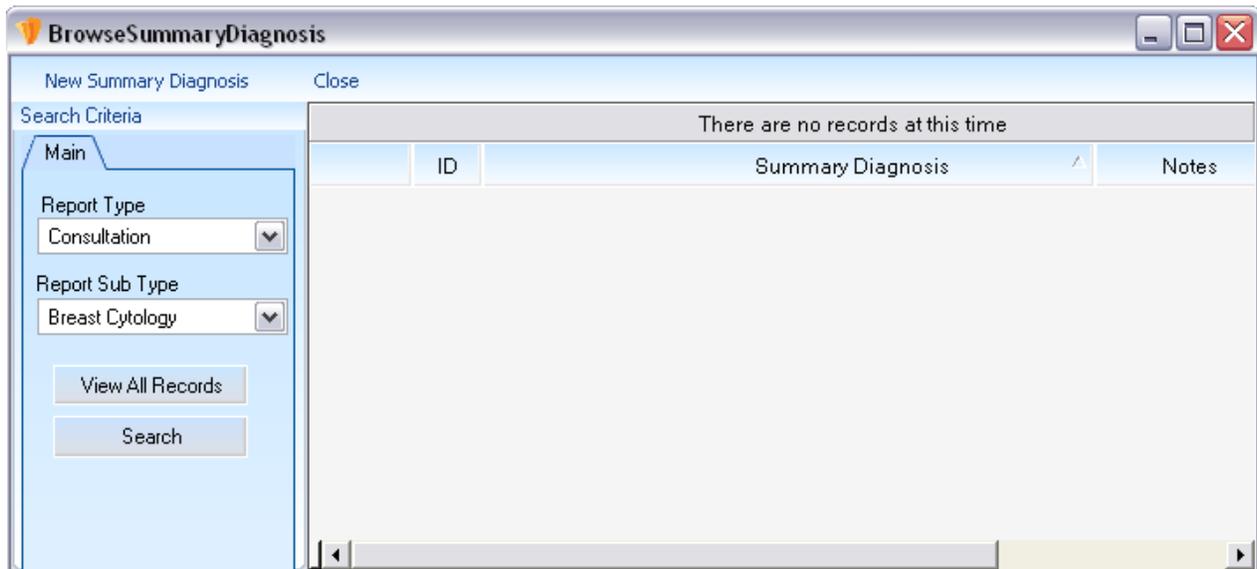
- To add a new specimen sub type, click **New Specimen Sub Type**, located on the tool bar in the **Browse Specimen Sub Types** Screen.
- At a minimum, user must enter report type, report sub type and specimen type.
- To Save the screen information, click **Save Specimen Sub Type**.

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**.

MANAGING SUMMARY DIAGNOSIS

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.

MANAGING SUMMARY DIAGNOSIS

Summary Diagnosis

Report Classification

Report Type: Consultation

Report Sub-Type: Breast Cytology

Diagnosis

Notes

Cancer

Red

Active

Mapping

ICD-9

Save Summary Diagnosis

Add New Summary Diagnosis

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**.

MANAGING SPECIMEN TESTS & STAINS

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 **Test Group** sub tab and entering the required description.

MANAGING INCIDENT TYPES

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.

The screenshot shows the 'Incident Type Maintenance' window. On the left is a 'Search Criteria' panel with a 'Main' tab and an 'Incident Type' search field. Below the field is a 'Search' button and a note: '* Entry accepts partial matching search'. The main area contains a table with columns: 'ID', 'Incident Type', 'Prevent Case Sign Out', and 'Client Error'. Each row has an 'Edit' button to its left.

| | ID | Incident Type | Prevent Case Sign Out | Client Error |
|------|----|---|-------------------------------------|-------------------------------------|
| Edit | 27 | Block empty, tissue did not survive processing | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Edit | 28 | Block empty, tissue missing | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Edit | 35 | Client Error - No insurance/Demographics sent | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | 34 | Client error Demographic Error Wrong/Insufficient | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | 57 | Client error, incorrect insurance information provided | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | 61 | Client error, No Insurance/Incorrect insurance informatio | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | 58 | Client error, specimen container empty-Notify Client | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | 2 | Client error, Container Empty, Client Notified | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | 19 | Client error, Specimen site discrepancy, left vs right-proc | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | 1 | Client error, Specimen Unlabeled - Returned | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | 42 | Client error, SPO not stamped on Requisition | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | 46 | Client Services error, missed verification | <input type="checkbox"/> | <input type="checkbox"/> |
| Edit | 47 | Data Entry Error, Chart number incomplete or wrong | <input type="checkbox"/> | <input type="checkbox"/> |
| Edit | 43 | Data Entry Error, Clinical Infor | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Edit | 51 | Data entry error, Incorrect Client information Entered | <input type="checkbox"/> | <input type="checkbox"/> |

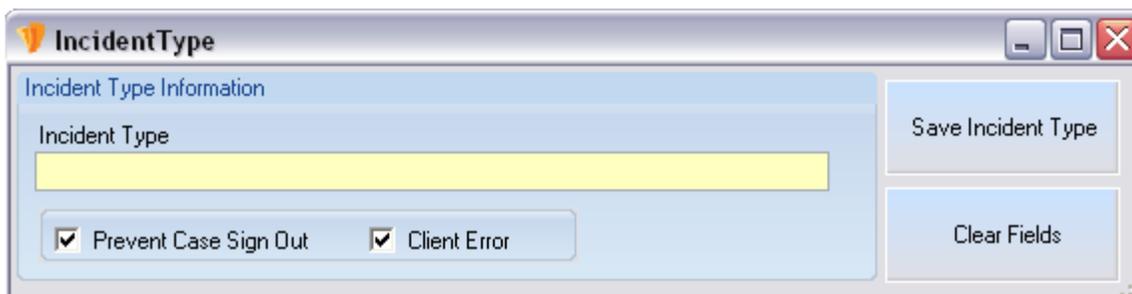
A) Searching Existing Incident Types:

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.

MANAGING INCIDENT TYPES



The screenshot shows a software window titled "IncidentType". Inside the window, there is a section labeled "Incident Type Information". This section contains a text input field for "Incident Type" which is currently highlighted in yellow. Below the input field, there are two checkboxes: "Prevent Case Sign Out" and "Client Error", both of which are checked. To the right of the input field and checkboxes, there are two buttons: "Save Incident Type" and "Clear Fields".

B) Establishing A New Incident Type:

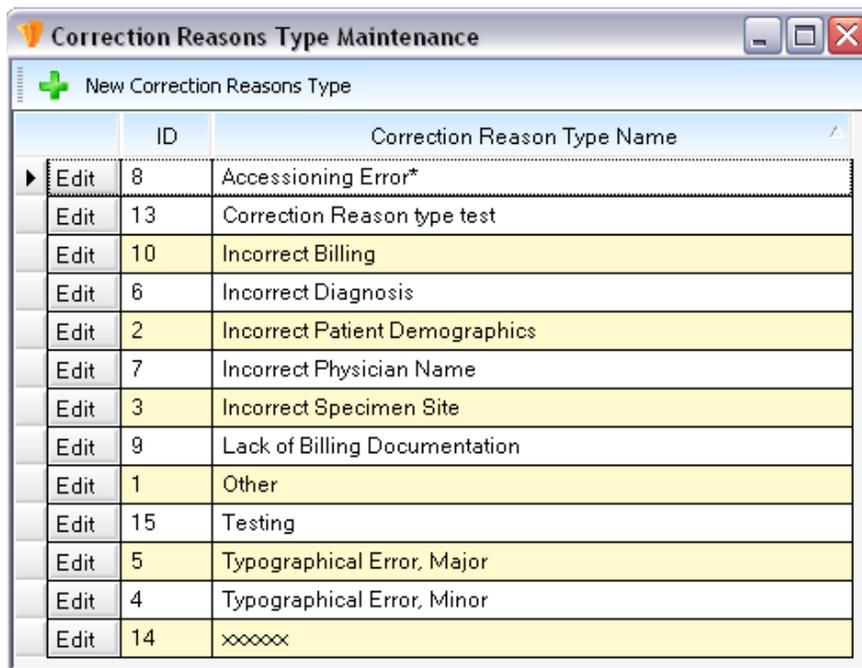
- To add new incident type, click **New Incident Type**. User must enter incident type.
- To save the screen information, click **Save Incident Type**.

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.

MANAGING CORRECTION REASONS

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**.



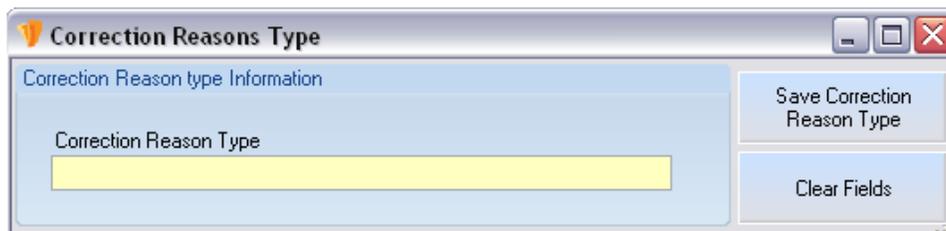
| New Correction Reasons Type | | |
|-----------------------------|----|--------------------------------|
| | ID | Correction Reason Type Name |
| ▶ Edit | 8 | Accessioning Error* |
| Edit | 13 | Correction Reason type test |
| Edit | 10 | Incorrect Billing |
| Edit | 6 | Incorrect Diagnosis |
| Edit | 2 | Incorrect Patient Demographics |
| Edit | 7 | Incorrect Physician Name |
| Edit | 3 | Incorrect Specimen Site |
| Edit | 9 | Lack of Billing Documentation |
| Edit | 1 | Other |
| Edit | 15 | Testing |
| Edit | 5 | Typographical Error, Major |
| Edit | 4 | Typographical Error, Minor |
| Edit | 14 | xxxxxx |

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**.



Correction Reasons Type

Correction Reason type Information

Correction Reason Type

Save Correction Reason Type

Clear Fields

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.

| | ID | Image Type | SendToClient | Mnemonic |
|------|----|---------------------------|-------------------------------------|----------|
| Edit | 35 | Additional Test | <input type="checkbox"/> | |
| Edit | 17 | Consult Request | <input type="checkbox"/> | |
| Edit | 18 | Consultation Report | <input type="checkbox"/> | |
| Edit | 26 | corrected Requisition | <input type="checkbox"/> | |
| Edit | 14 | Driver License Card | <input type="checkbox"/> | |
| Edit | 10 | Facesheet | <input type="checkbox"/> | FS |
| Edit | 15 | Fax Confirmation Sheet | <input type="checkbox"/> | |
| Edit | 30 | Molecular Genetics Report | <input checked="" type="checkbox"/> | |
| Edit | 36 | New Image Type | <input checked="" type="checkbox"/> | |
| Edit | 6 | Other | <input type="checkbox"/> | OTH |
| Edit | 7 | Patient Medical History* | <input checked="" type="checkbox"/> | |
| Edit | 28 | Patient Release | <input type="checkbox"/> | |
| Edit | 31 | Picture Image | <input type="checkbox"/> | |

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**.

Image Type

Image Type Information

Image Type:

Mnemonic:

Sent To Client

Save Image Type

Clear Fields

FEE SCHEDULES & PRICING MANAGEMENT

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

FeeSchedule

Save Print

Master Fee
 Client Fee

Vendor:
Reliance

Client: ID Name
10 - Sample Client 10

Requesting Physician:
ALL

CPT Code

- ⊕ CPT Code : 38220 (9 items)
- ⊕ CPT Code : 38221 (9 items)
- ⊕ CPT Code : 80500 (9 items)
- ⊕ CPT Code : 83891 (9 items)
- ⊕ CPT Code : 83892 (9 items)
- ⊕ CPT Code : 83894 (9 items)
- ⊕ CPT Code : 83898 (9 items)
- ⊕ CPT Code : 83900 (9 items)
- ⊕ CPT Code : 87252 (9 items)
- ⊕ CPT Code : 87254 (9 items)

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

FEE SCHEDULES & PRICING MANAGEMENT

The screenshot shows a web application window titled "FeeSchedule". At the top left, there are "Save" and "Print" buttons. The main form area is divided into two sections. The top section contains three dropdown menus: "Vendor:" with the value "Reliance", "Client:" with the value "10 - Sample Client 10", and "Requesting Physician:" with the value "ALL". The "Client:" dropdown has radio buttons for "ID" (selected) and "Name". The bottom section is a list of CPT codes, each with a plus sign icon to its left, indicating it can be expanded. The codes listed are: 38220 (9 items), 38221 (9 items), 80500 (9 items), 83891 (9 items), 83892 (9 items), 83894 (9 items), 83898 (9 items), 83900 (9 items), 87252 (9 items), and 87254 (9 items). A scrollbar is visible on the right side of the list.

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.



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DID YOU KNOW?

- 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

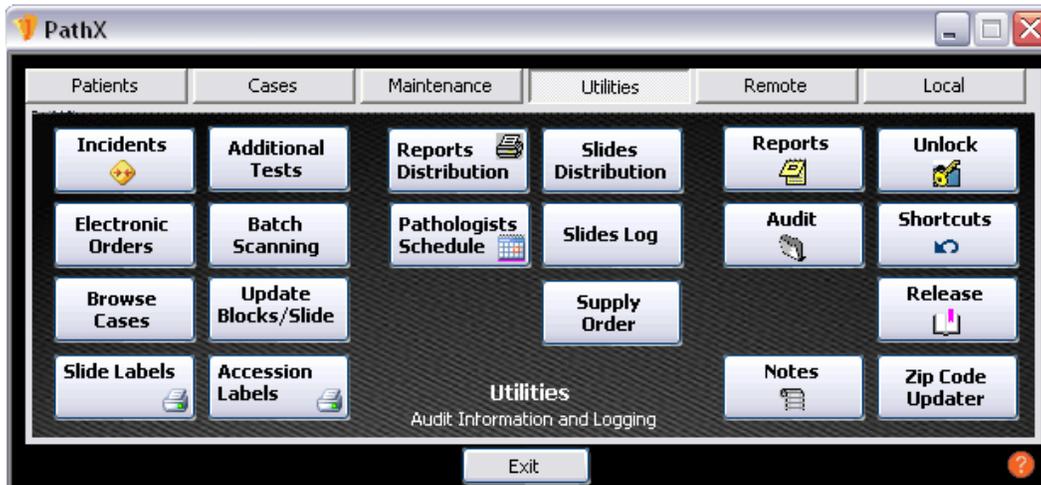


UTILITIES MODULE



pathx

CHAPTER 4: UTILITIES MODULE



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.

21. Zip Code Updater

Provides the ability to upload regularly received zip code updates.

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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 Incident s, and **C)** Editing Existing Incidents.

| Detail | Status | Accession Number | Client ID | Client Name | Patient Name |
|--------|--------|------------------|-----------|-------------|--------------|
|--------|--------|------------------|-----------|-------------|--------------|

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 Image Type:

- 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**

| Create Case | Status | Reference Number | Collected Date | Spec. Count | Client ID | Client Name |
|-------------|--------|------------------|----------------|-------------|-----------|-------------------|
| New Case | ⚠ | 18 | 09/29/2010 | 1 | 111 | Sample Client 111 |
| New Case | ⚠ | 19 | 09/29/2010 | 1 | 111 | Sample Client 111 |
| New Case | ⚠ | 45 | 10/08/2010 | 1 | 111 | Sample Client 111 |
| New Case | ⚠ | 46 | 10/08/2010 | 1 | 111 | Sample Client 111 |
| New Case | ⚠ | 47 | 10/08/2010 | 1 | 111 | Sample Client 111 |
| New Case | ⚠ | 62 | 10/12/2010 | 1 | 111 | Sample Client 111 |
| New Case | ⚠ | 81 | 10/13/2010 | 1 | 111 | Sample Client 111 |
| New Case | ⚠ | 85 | 10/13/2010 | 1 | 111 | Sample Client 111 |
| New Case | ⚠ | 88 | 10/22/2010 | 1 | 111 | Sample Client 111 |
| New Case | ⚠ | 94 | 12/01/2010 | 1 | 111 | Sample Client 111 |
| New Case | ⚠ | 96 | 12/08/2010 | 1 | 111 | Sample Client 111 |
| New Case | ⚠ | | 02/04/2011 | 1 | 511 | Sample Client 511 |

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**.

MANAGING CASES

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**

Browse Cases

Search Criteria

Accession:

Status:

Client: by ID by Name

Pathologist:

Report Type and Sub Type

Chart #:

Filter by Patient

Filter by Date:

Advanced Options

| View | Patient | Accession Number | Collected Date | Received Date | Reported Date | Case Status |
|-------------------------------------|---------|------------------|----------------|---------------|---------------|-----------------------|
| <input type="button" value="View"/> | Patient | 1REL-11-01238 | 1/1/1900 | 1/1/1900 | | Pending Clinical Data |
| <input type="button" value="View"/> | Patient | 1REL-11-01160 | 1/1/2011 | 1/1/2011 | | Pending SignOut |
| <input type="button" value="View"/> | Patient | 1REL-11-01179 | 1/1/2011 | 1/1/2011 | | Pending SignOut |
| <input type="button" value="View"/> | Patient | 1REL-11-01236 | 1/1/2011 | 1/1/2011 | | Pending SignOut |
| <input type="button" value="View"/> | Patient | 1REL-11-00020A | 2/10/2011 | 2/10/2011 | | Pending Supplemental |
| <input type="button" value="View"/> | Patient | 1REL-11-00021 | 2/11/2011 | 2/11/2011 | | Pending Gross |
| <input type="button" value="View"/> | Patient | 1REL-11-00022 | 2/15/2011 | 2/15/2011 | | Pending CPT Codes |
| <input type="button" value="View"/> | Patient | 1WPC-11-00002 | 2/23/2011 | 2/23/2011 | | Pending Specimens |
| <input type="button" value="View"/> | Patient | 1REL-11-00026 | 2/24/2011 | 2/24/2011 | | Pending Gross |
| <input type="button" value="View"/> | Patient | 1REL-11-00027 | 2/28/2011 | 2/28/2011 | | Pending Gross |
| <input type="button" value="View"/> | Patient | 1REL-11-00028 | 3/3/2011 | 3/3/2011 | | Pending CPT Codes |
| <input type="button" value="View"/> | Patient | 1REL-11-00029 | 3/3/2011 | 3/3/2011 | | Pending Gross |
| <input type="button" value="View"/> | Patient | 2REL-11-00008 | 3/3/2011 | 3/3/2011 | | Pending Pathologist |
| <input type="button" value="View"/> | Patient | 1REL-11-00030 | 3/14/2011 | 3/14/2011 | | Pending CPT Codes |
| <input type="button" value="View"/> | Patient | 1REL-11-00031 | 3/21/2011 | 3/21/2011 | | Pending Gross |
| <input type="button" value="View"/> | Patient | 1REL-11-00032 | 3/21/2011 | 3/21/2011 | | Pending Gross |
| <input type="button" value="View"/> | Patient | 1REL-11-00033 | 3/21/2011 | 3/21/2011 | | Pending CPT Codes |
| <input type="button" value="View"/> | Patient | 1REL-11-00034 | 2/4/2011 | 3/22/2011 | | Pending Gross |
| <input type="button" value="View"/> | Patient | 1REL-11-00035 | 3/22/2011 | 3/22/2011 | | Pending Clinical Data |
| <input type="button" value="View"/> | Patient | 2REL-11-00009 | 9/14/2010 | 3/22/2011 | | Pending CPT Codes |
| <input type="button" value="View"/> | Patient | 1PRO-11-00001A | 4/3/2011 | 4/3/2011 | | Pending CPT Codes |
| <input type="button" value="View"/> | Patient | 1PRO-11-00002A | 4/4/2011 | 4/4/2011 | | Pending CPT Codes |
| <input type="button" value="View"/> | Patient | 1REL-11-00036 | 4/10/2011 | 4/13/2011 | | Ready for Pathologist |
| <input type="button" value="View"/> | Patient | 1WPC-11-00004A | 4/25/2011 | 4/25/2011 | | Ready for Pathologist |
| <input type="button" value="View"/> | Patient | 1WPC-11-00005 | 4/28/2011 | 4/28/2011 | | Pending CPT Codes |

Cases found: 220

A) Searching For An Existing Case

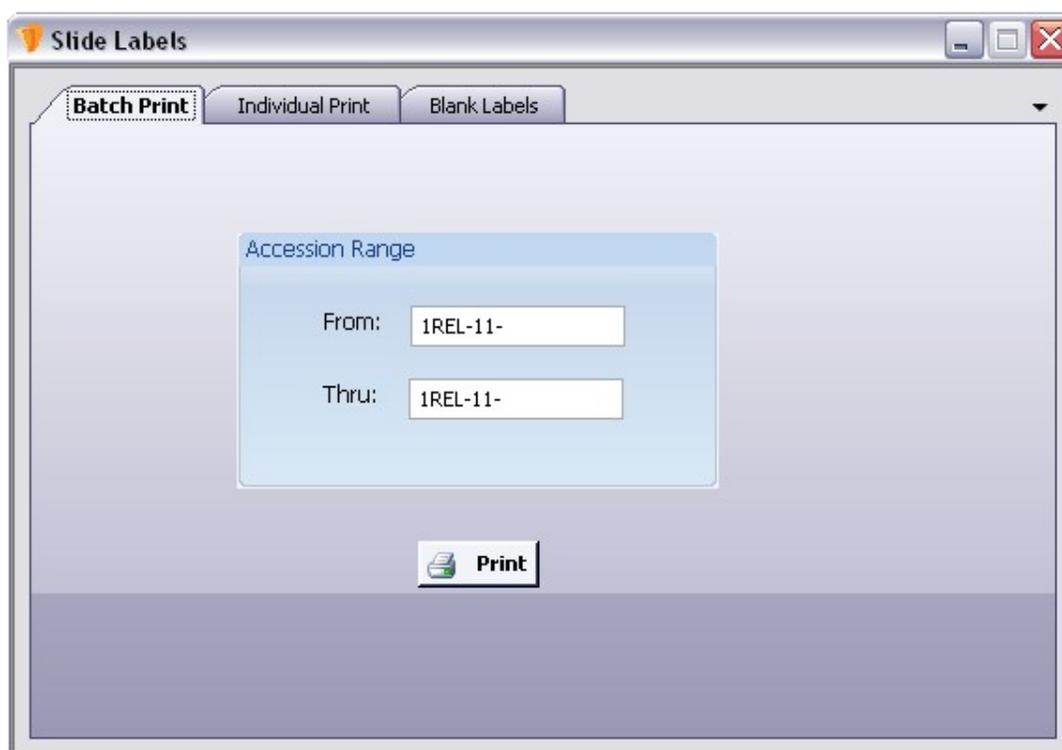
- Users can search Cases using an accession number, open or close status, client, pathologist, report type, sub type, or Chart number. The search function also allows for cases to be filtered by patient or date.

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

MANAGING SLIDE LABELS

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.

MANAGING LAB TESTS

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

| Status | Accession | Blocks# | Test | Slide Count | Units To Bill | TAT (Days) | Location | Control Results |
|---------|---------------|---------|-----------------------|-------------|---------------|------------|----------|-----------------|
| Warning | 1CON-10-00008 | 1D | GMS | 1 | 1 | 485 | | |
| Warning | 1CON-10-00017 | 1A | Cut Thru | 6 | 1 | 483 | | |
| Warning | 1CON-10-00024 | 1A | ALK1 - Anaplastic Ly | 2 | 1 | 480 | | |
| Warning | 1CON-10-00024 | 1A | CEA - Carcinoembryo | 2 | 1 | 480 | | |
| Warning | 1CON-10-00024 | 2A | CEA - Carcinoembryo | 2 | 1 | 480 | | |
| Warning | 1CON-10-00024 | 2A | EGFR - Epidermal Gro | 2 | 1 | 480 | | |
| Warning | 1CON-10-00041 | 1A | HPY - Helicobacter Py | 2 | 1 | 476 | | |
| Warning | 1CON-10-00056 | | Congo Red | 1 | 1 | 344 | | |
| Warning | 1DCD-09-00002 | A | ER | 2 | 1 | 538 | | |
| Warning | 1DCD-09-00002 | A | ER | 2 | 1 | 538 | Reliance | |

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.

MANAGING LAB TESTS

311 Tests found

| Status | Accession | Blocks# | Test | Slide Count | Units To Bill | TAT (Days) | Location | Control Results |
|--------|---------------|---------|-----------------------|-------------|---------------|------------|----------|-----------------|
| ⚠ | 1CON-10-00008 | 1D | GMS | 1 | 1 | 485 | | Cancel |
| ⚠ | 1CON-10-00017 | 1A | Cut Thru | 6 | 1 | 483 | | Complete |
| ⚠ | 1CON-10-00024 | 1A | ALK1 - Anaplastic Ly | 2 | 1 | 480 | | Cancel |
| ⚠ | 1CON-10-00024 | 1A | CEA - Carcinoembryo | 2 | 1 | 480 | | Complete |
| ⚠ | 1CON-10-00024 | 2A | CEA - Carcinoembryo | 2 | 1 | 480 | | Cancel |
| ⚠ | 1CON-10-00024 | 2A | EGFR - Epidermal Gro | 2 | 1 | 480 | | Complete |
| ⚠ | 1CON-10-00041 | 1A | HPY - Helicobacter Py | 2 | 1 | 476 | | Cancel |
| ⚠ | 1CON-10-00056 | | Congo Red | 1 | 1 | 344 | | Complete |
| ⚠ | 1DCD-09-00002 | A | ER | 2 | 1 | 538 | | Cancel |
| ⚠ | 1DCD-09-00002 | A | ER | 2 | 1 | 538 | Reliance | Complete |

B) Recording Control Results For Selected Tests:

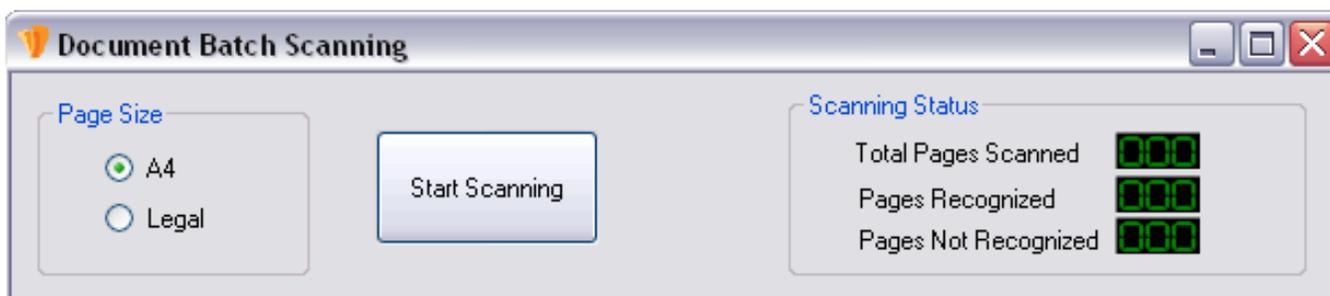
1. Select the Test that is to have the results recorded by highlighting the row of the test
2. Select the **Control Results** button,
3. Click the appropriate result, **Positive** or **Negative**

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**



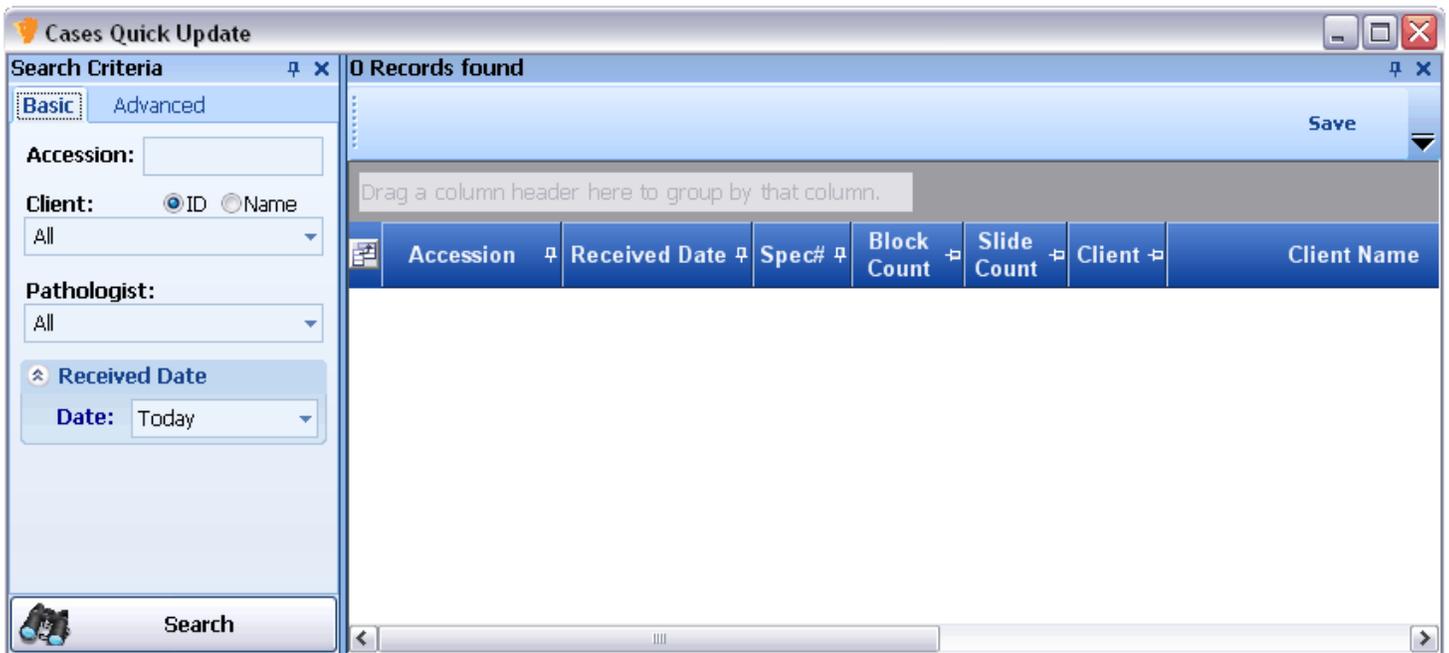
The Document Batch Scanning Toolset allows the user to scan a batch of documents from different accessions and automatically assign the documents to their respective accession.

A) Scanning Multiple Documents:

1. Select the **Page Size** of the document(s) ready for scanning,
2. Press the **Start Scanning** button.

BLOCK & SLIDE MANAGEMENT

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.



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

ACCESSION LABELING

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.**

| Selected | Accession Wheel | Start Accession | # Of Cases Per Wheel | # Of Labels Per Case | # Of Req Labels | # Of FS Labels | # Of Ins Labels |
|--------------------------|-----------------|-----------------|----------------------|----------------------|-----------------|----------------|-----------------|
| <input type="checkbox"/> | 1### | 13 | 0 | 8 | 1 | 1 | 2 |
| <input type="checkbox"/> | 1AAA | 2 | 0 | 8 | 1 | 1 | 2 |
| <input type="checkbox"/> | 1AAD | 6 | 0 | 8 | 1 | 1 | 2 |
| <input type="checkbox"/> | 1APO | 2 | 0 | 8 | 1 | 1 | 2 |
| <input type="checkbox"/> | 1BAU | 2 | 0 | 8 | 1 | 1 | 2 |
| <input type="checkbox"/> | 1CON | 2 | 0 | 8 | 1 | 1 | 2 |
| <input type="checkbox"/> | 1DCD | 5 | 0 | 8 | 1 | 1 | 2 |
| <input type="checkbox"/> | 1DJG | 2 | 0 | 8 | 1 | 1 | 2 |
| <input type="checkbox"/> | 1END | 7 | 0 | 8 | 1 | 1 | 2 |
| <input type="checkbox"/> | 1FUP | 8 | 0 | 8 | 1 | 1 | 2 |
| <input type="checkbox"/> | 1HEH | 1 | 0 | 8 | 1 | 1 | 2 |
| <input type="checkbox"/> | 1MEM | 5 | 0 | 8 | 1 | 1 | 2 |
| <input type="checkbox"/> | 1MIP | 2 | 0 | 8 | 1 | 1 | 2 |
| <input type="checkbox"/> | 1PRB | 8 | 0 | 8 | 1 | 1 | 2 |
| <input type="checkbox"/> | 1PRH | 1 | 0 | 8 | 1 | 1 | 2 |
| <input type="checkbox"/> | 1PRO | 8 | 0 | 8 | 1 | 1 | 2 |

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.

DISTRIBUTION OF CLIENT REPORTS

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.

The screenshot shows the 'Client Reports Distribution' window. On the left, there are search criteria including 'Delivery Type' (set to All), 'View Reports' (with radio buttons for Pending, Processed, In Process, Cancelled, On Hold), 'Client' (set to All), 'Report Types' (set to All), and 'Filter by Reported Date' (checked, with From Date: 1/1/2010 and Thru Date: 12/31/2010). An 'Accession No.' field is also present. A 'Search' button is at the bottom of the search criteria panel. The main area contains a table with columns: Select, Type, Log, Accession Number, Delivery Date, User Name, Reported Date, Collected Date, and Target Type. The table lists 260 reports. At the bottom of the window, it says 'Reports found: 260'.

| Select | Type | Log | Accession Number | Delivery Date | User Name | Reported Date | Collected Date | Target Type |
|--------------------------|------|------|------------------|-------------------|-----------|--------------------|----------------|-------------|
| <input type="checkbox"/> | | View | 1REL-09-00025 | 2/26/2010 4:32 PM | System | 1/14/2010 9:49 AM | 3/23/2009 | CLIENT |
| <input type="checkbox"/> | | View | 1REL-09-00025 | 2/26/2010 4:32 PM | System | 1/14/2010 9:49 AM | 3/23/2009 | CLIENT |
| <input type="checkbox"/> | | View | 1REL-10-00002 | 2/26/2010 4:32 PM | System | 1/14/2010 12:54 PM | 1/11/2010 | CLIENT |
| <input type="checkbox"/> | | View | 1REL-10-00002 | 2/26/2010 4:32 PM | System | 1/14/2010 12:54 PM | 1/11/2010 | CLIENT |
| <input type="checkbox"/> | | View | 1REL-10-00002 | 2/26/2010 4:32 PM | System | 1/14/2010 12:54 PM | 1/11/2010 | COPY CLIENT |
| <input type="checkbox"/> | | View | 1REL-10-00108 | 2/26/2010 4:32 PM | System | 1/14/2010 2:54 PM | 1/12/2010 | CLIENT |
| <input type="checkbox"/> | | View | 1REL-10-00108 | 2/26/2010 4:32 PM | System | 1/14/2010 2:54 PM | 1/12/2010 | CLIENT |
| <input type="checkbox"/> | | View | 1REL-10-00108 | 2/26/2010 4:32 PM | System | 1/14/2010 2:54 PM | 1/12/2010 | CLIENT |
| <input type="checkbox"/> | | View | 1REL-10-00108 | 2/26/2010 4:32 PM | System | 1/14/2010 2:54 PM | 1/12/2010 | CLIENT |
| <input type="checkbox"/> | | View | 1REL-10-00108 | 2/26/2010 4:32 PM | System | 1/14/2010 2:54 PM | 1/12/2010 | CLIENT |
| <input type="checkbox"/> | | View | 1REL-10-00002A | 2/26/2010 4:32 PM | System | 1/14/2010 3:54 PM | 1/11/2010 | CLIENT |
| <input type="checkbox"/> | | View | 1REL-10-00002A | 2/26/2010 4:32 PM | System | 1/14/2010 3:54 PM | 1/11/2010 | CLIENT |
| <input type="checkbox"/> | | View | 1REL-10-00002A | 2/26/2010 4:59 PM | System | 1/14/2010 3:54 PM | 1/11/2010 | COPY CLIENT |
| <input type="checkbox"/> | | View | 1REL-10-00110 | 2/26/2010 4:32 PM | System | 1/15/2010 1:09 PM | 1/12/2010 | CLIENT |
| <input type="checkbox"/> | | View | 1REL-10-00110 | 2/26/2010 4:32 PM | System | 1/15/2010 1:09 PM | 1/12/2010 | CLIENT |

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.

DISTRIBUTION OF CLIENT REPORTS

| Select | Type | Log | Accession Number | Delivery Date | User Name | Reported Date | Collected Date | Target Type |
|--------------------------|------|------|------------------|-------------------|-----------|--------------------|----------------|-------------|
| <input type="checkbox"/> | | View | IREL-09-00025 | 2/26/2010 4:32 PM | System | 1/14/2010 9:49 AM | 3/23/2009 | CLIENT |
| <input type="checkbox"/> | | View | IREL-09-00025 | 2/26/2010 4:32 PM | System | 1/14/2010 9:49 AM | 3/23/2009 | CLIENT |
| <input type="checkbox"/> | | View | IREL-10-00002 | 2/26/2010 4:32 PM | System | 1/14/2010 12:54 PM | 1/11/2010 | CLIENT |
| <input type="checkbox"/> | | View | IREL-10-00002 | 2/26/2010 4:32 PM | System | 1/14/2010 12:54 PM | 1/11/2010 | CLIENT |
| <input type="checkbox"/> | | View | IREL-10-00002 | 2/26/2010 4:32 PM | System | 1/14/2010 12:54 PM | 1/11/2010 | COPY CLIENT |
| <input type="checkbox"/> | | View | IREL-10-00108 | 2/26/2010 4:32 PM | System | 1/14/2010 2:54 PM | 1/12/2010 | CLIENT |
| <input type="checkbox"/> | | View | IREL-10-00108 | 2/26/2010 4:32 PM | System | 1/14/2010 2:54 PM | 1/12/2010 | CLIENT |
| <input type="checkbox"/> | | View | IREL-10-00108 | 2/26/2010 4:32 PM | System | 1/14/2010 2:54 PM | 1/12/2010 | CLIENT |
| <input type="checkbox"/> | | View | IREL-10-00108 | 2/26/2010 4:32 PM | System | 1/14/2010 2:54 PM | 1/12/2010 | CLIENT |
| <input type="checkbox"/> | | View | IREL-10-00108 | 2/26/2010 4:32 PM | System | 1/14/2010 2:54 PM | 1/12/2010 | CLIENT |
| <input type="checkbox"/> | | View | IREL-10-00002A | 2/26/2010 4:32 PM | System | 1/14/2010 3:54 PM | 1/11/2010 | CLIENT |
| <input type="checkbox"/> | | View | IREL-10-00002A | 2/26/2010 4:32 PM | System | 1/14/2010 3:54 PM | 1/11/2010 | CLIENT |
| <input type="checkbox"/> | | View | IREL-10-00002A | 2/26/2010 4:59 PM | System | 1/14/2010 3:54 PM | 1/11/2010 | COPY CLIENT |
| <input type="checkbox"/> | | View | IREL-10-00110 | 2/26/2010 4:32 PM | System | 1/15/2010 1:09 PM | 1/12/2010 | CLIENT |
| <input type="checkbox"/> | | View | IREL-10-00110 | 2/26/2010 4:32 PM | System | 1/15/2010 1:09 PM | 1/12/2010 | CLIENT |

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:

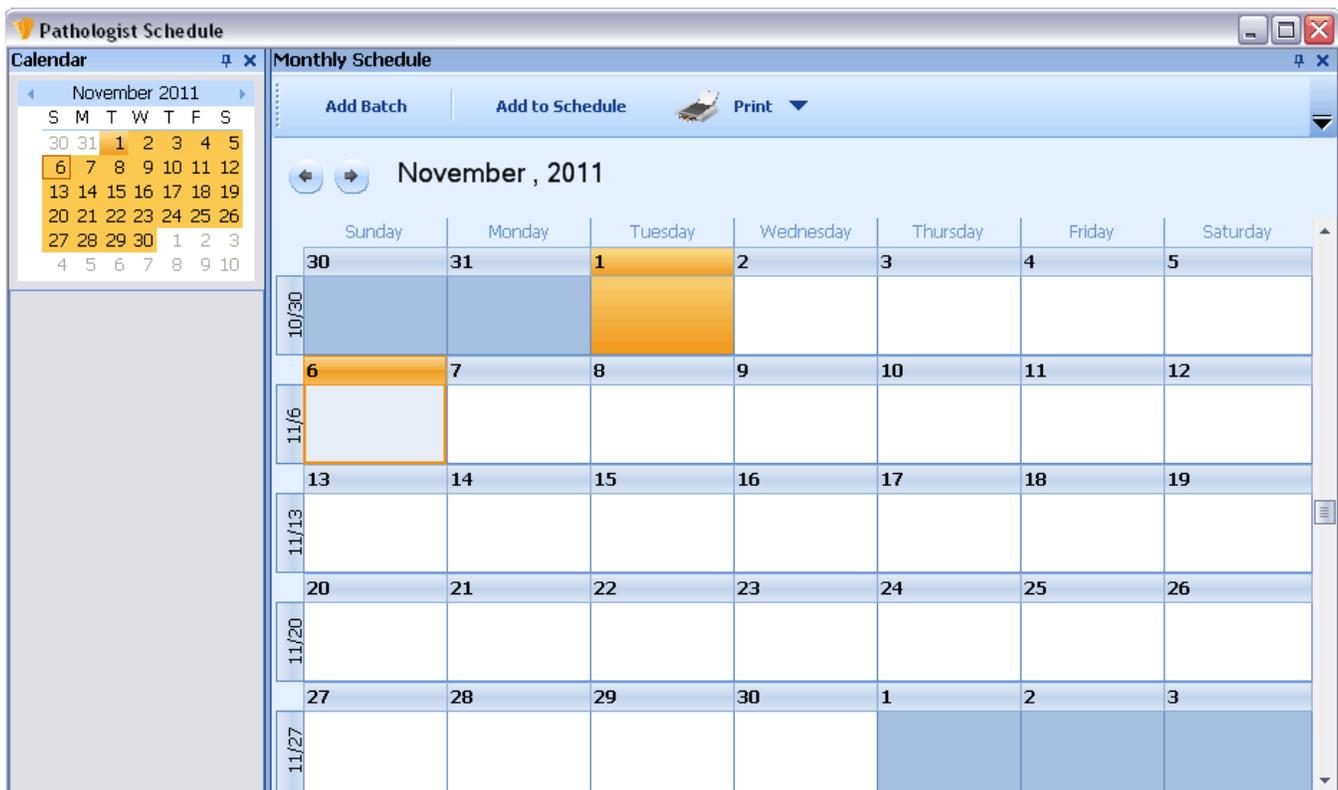
1. Select the Report for which the deliver is to be canceled by checking the box located in the Select Column
2. Click the **Remove Reports** button located in the top right corner of the screen

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

MANAGING PATHOLOGIST SCHEDULES

10. 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.



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.

MANAGING PATHOLOGIST SCHEDULES

Batch Schedule

Batch

Note:
Please, leave the **Number of Specimens per Day** empty if there is not maximum amount of specimens for the pathologist.

| | Pathologist Name | Location | # Specimens x Day |
|---|---------------------------------------|------------------|-------------------|
| ▶ | , Administrator | Testing Location | 50 |
| | User, New | Unknown | 45 |
| * | Click here to add a new pathologist.. | | |

Add All

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**

Addition to Schedule

Individual

Pathologist:
[Dropdown]

Work Information

Working: On Off

At Location: [Dropdown]

Quota of Specimens:

Not Taking Specimens

Maximum # of Specimens: [1]

No Maximum

Comments:
[Text Area]

Save

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.

The screenshot shows the 'Slides Distribution' window. On the left is the 'Search Criteria' panel with the following fields:

- Accession:** [Text input]
- Client:** ID Name
- Slides Location:** [Dropdown menu: Unassigned]
- Pathologist:** [Dropdown menu: All]
- Date:** [Expanded section]
 - Date:** [Dropdown menu: Date Range]
 - From:** [Dropdown menu: 11/04/2011]
 - Thru:** [Dropdown menu: 11/04/2011]

At the bottom of the search criteria panel is a 'Search' button with a magnifying glass icon. The main area of the window shows '0 Records found' and a table with the following columns: Accession, Received Date, Case Status, Client, and Client Name. The table is currently empty.

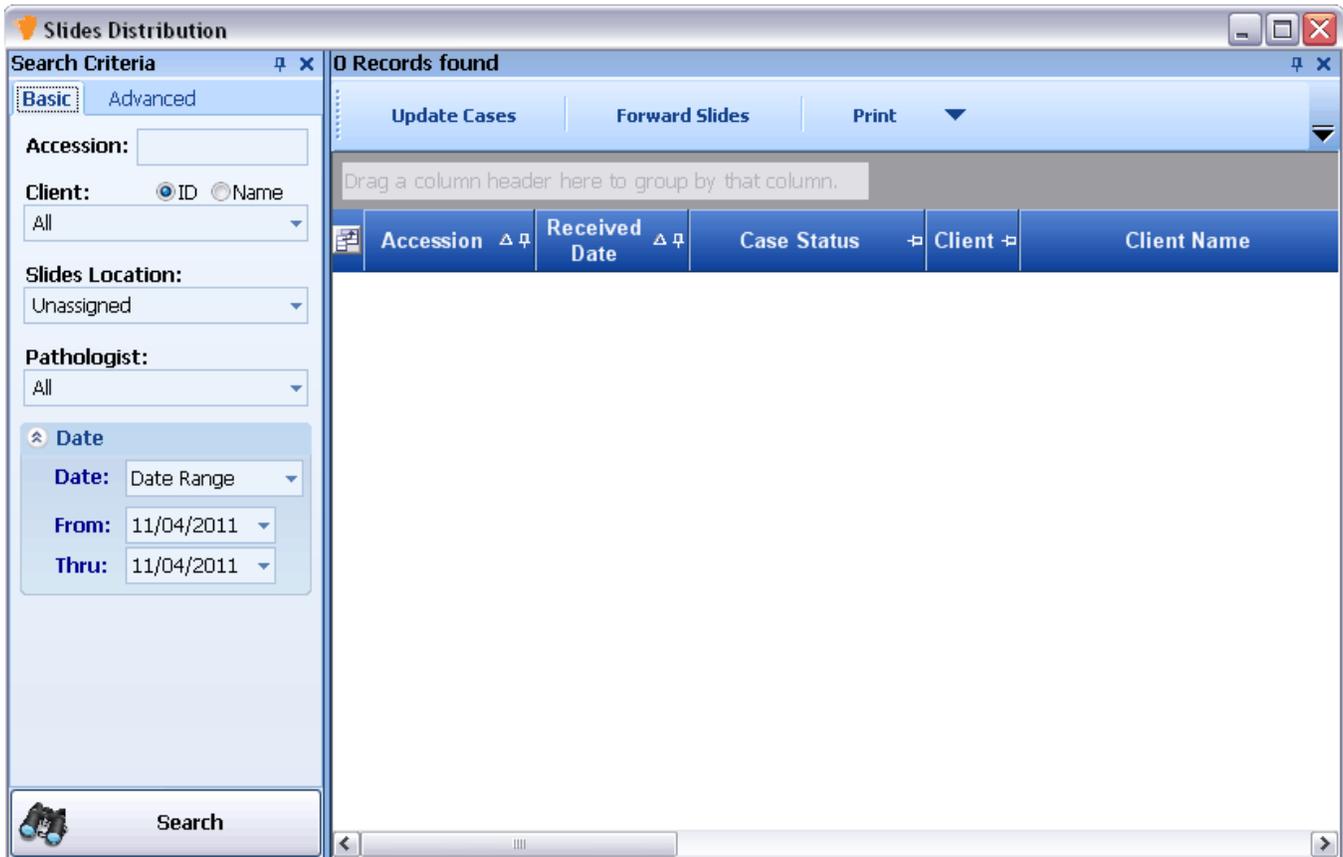
A) Searching For Existing Slide Locations:

- 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

MANAGING SLIDE DISTRIBUTION & LOCATIONS



B) Recording and/or Updating the Location of Existing Slides:

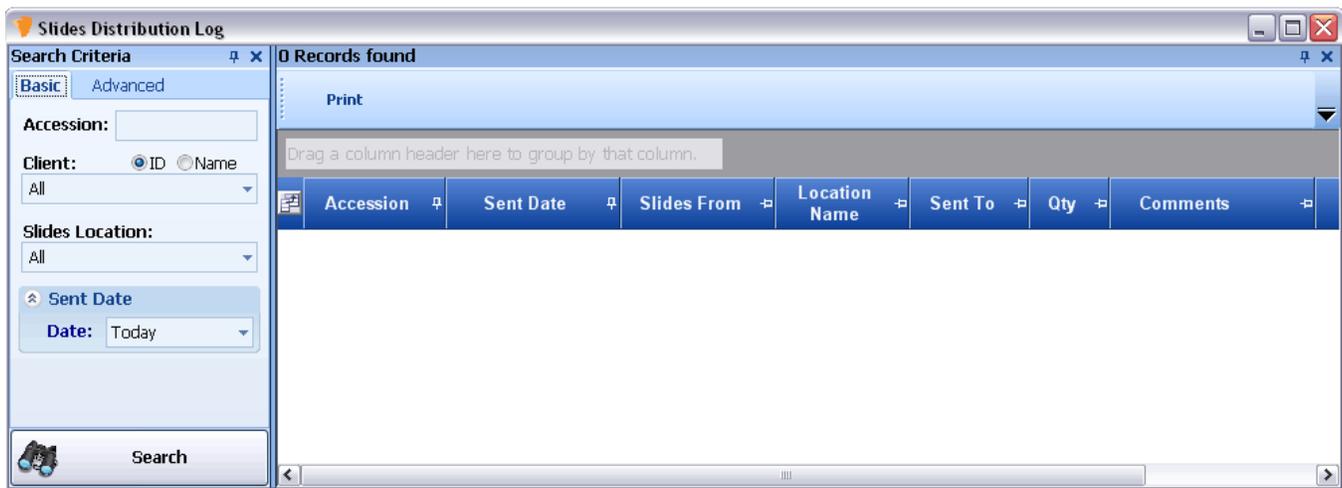
1. Select the Case that is to be have the slide location revised
2. Click the **Forward Slides** Button,
3. Select the current location, and add addition comments if deemed necessary
4. Click the **Save** Button.

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.

SLIDE LOG MANAGEMENT

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 range 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.

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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:

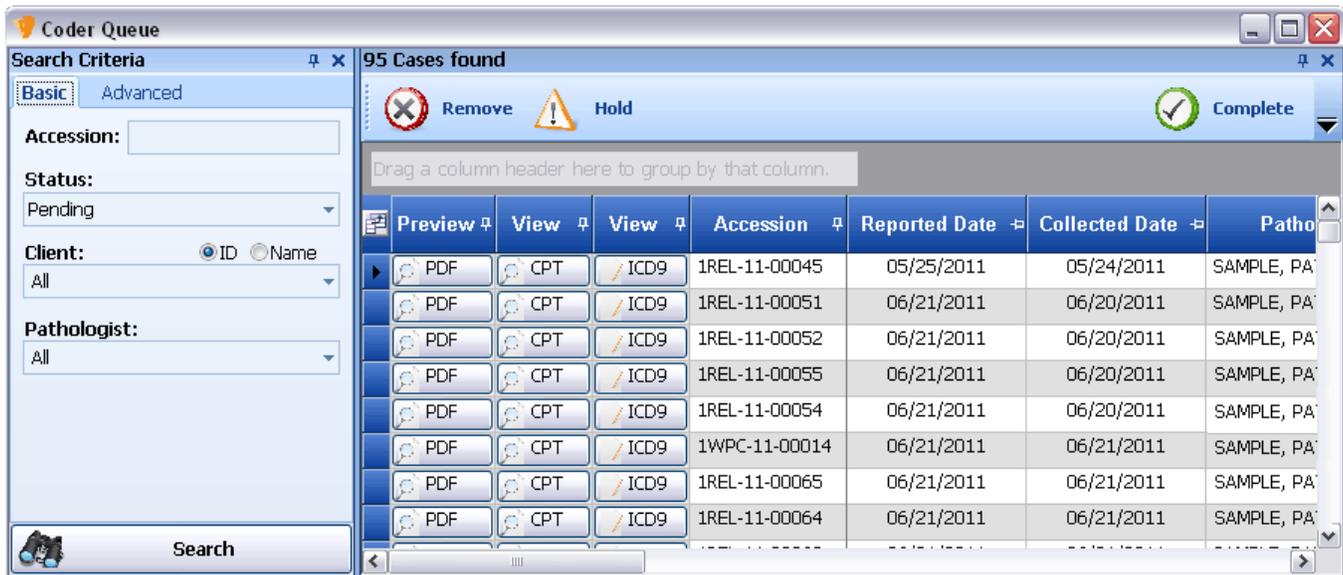
- Users have the ability to filter existing cases via the Search Criteria Engine located on the left side of the Coder Queue Toolset

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.

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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 where 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 where 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

The screenshot shows the 'Browse Supply Orders' window with the following search criteria:

- Status: All
- Order Origination: All
- Client: All
- User: All
- Requested Date: Fixed Date (selected)

The table below represents the data shown in the screenshot:

| | Req. ID | Client | Requested Date | Expected Date | Delivered Date | Status |
|------|---------|-----------------------|----------------|---------------------|---------------------|-----------|
| Edit | 50 | 13-Sample Client 13 | 05/04/2009 | | | Cancelled |
| Edit | 54 | 63-Sample Client 63 | 05/15/2009 | | | Cancelled |
| Edit | 65 | 111-Sample Client 111 | 03/25/2010 | | | Cancelled |
| Edit | 73 | 10-Sample Client 10 | 01/19/2011 | | | Cancelled |
| Edit | 74 | 10-Sample Client 10 | 01/19/2011 | | 01/19/2011 03:46 PM | Shipped |
| Edit | 75 | 10-Sample Client 10 | 01/19/2011 | | 01/19/2011 03:51 PM | Shipped |
| Edit | 78 | 10-Sample Client 10 | 01/19/2011 | | 01/19/2011 05:35 PM | Shipped |
| Edit | 46 | 20-Sample Client 20 | 05/04/2009 | 05/04/2009 10:17 AM | 05/04/2009 12:00 AM | Shipped |
| Edit | 47 | 18-Sample Client 18 | 05/04/2009 | 05/04/2009 11:13 AM | 05/04/2009 12:38 PM | Shipped |
| Edit | 48 | 21-Sample Client 21 | 05/04/2009 | 05/04/2009 12:39 PM | 05/04/2009 01:14 PM | Shipped |
| Edit | 49 | 26-Sample Client 26 | 05/04/2009 | 05/04/2009 01:17 PM | 05/04/2009 03:06 PM | Shipped |
| Edit | 45 | 10-Sample Client 10 | 05/03/2009 | 05/05/2009 07:17 PM | 05/04/2009 12:00 AM | Shipped |
| Edit | 51 | 10-Sample Client 10 | 05/15/2009 | 05/15/2009 11:31 AM | | Pending |
| Edit | 52 | 10-Sample Client 10 | 05/15/2009 | 05/15/2009 11:36 AM | | Pending |
| Edit | 53 | 10-Sample Client 10 | 05/15/2009 | 05/15/2009 11:39 AM | | Pending |
| Edit | 55 | 10-Sample Client 10 | 05/20/2009 | 05/20/2009 02:45 PM | | Pending |
| Edit | 56 | 85-Sample Client 85 | 06/15/2009 | 06/15/2009 05:48 PM | | Pending |
| Edit | 57 | 410-Sample Client 410 | 06/16/2009 | 06/16/2009 09:18 AM | | Pending |
| Edit | 58 | 490-Sample Client 490 | 06/16/2009 | 06/16/2009 09:46 AM | | Pending |
| Edit | 59 | 10-Sample Client 10 | 06/18/2009 | 06/18/2009 11:57 AM | | Pending |
| Edit | 60 | 10-Sample Client 10 | 06/18/2009 | 06/18/2009 12:08 PM | | Pending |
| Edit | 61 | 13-Sample Client 13 | 07/17/2009 | 07/17/2009 03:48 PM | 07/17/2009 04:27 PM | Shipped |
| Edit | 62 | 21-Sample Client 21 | 07/17/2009 | 07/17/2009 05:15 PM | | Pending |

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.

MANAGING LAB SUPPLY ORDERS

Browse Supply Orders

New Supply Request Order Print

Search Criteria

Main

Status: All

Order Origination: All

Client: All

User: All

Requested Date

Fixed Date

Specific year / month

Date Range

Search

| | Req. ID | Client | Requested Date | Expected Date | Delivered Date | Status |
|------|---------|-----------------------|----------------|---------------------|---------------------|-----------|
| Edit | 50 | 13-Sample Client 13 | 05/04/2009 | | | Cancelled |
| Edit | 54 | 63-Sample Client 63 | 05/15/2009 | | | Cancelled |
| Edit | 65 | 111-Sample Client 111 | 03/25/2010 | | | Cancelled |
| Edit | 73 | 10-Sample Client 10 | 01/19/2011 | | | Cancelled |
| Edit | 74 | 10-Sample Client 10 | 01/19/2011 | | 01/19/2011 03:46 PM | Shipped |
| Edit | 75 | 10-Sample Client 10 | 01/19/2011 | | 01/19/2011 03:51 PM | Shipped |
| Edit | 78 | 10-Sample Client 10 | 01/19/2011 | | 01/19/2011 05:35 PM | Shipped |
| Edit | 46 | 20-Sample Client 20 | 05/04/2009 | 05/04/2009 10:17 AM | 05/04/2009 12:00 AM | Shipped |
| Edit | 47 | 18-Sample Client 18 | 05/04/2009 | 05/04/2009 11:13 AM | 05/04/2009 12:38 PM | Shipped |
| Edit | 48 | 21-Sample Client 21 | 05/04/2009 | 05/04/2009 12:39 PM | 05/04/2009 01:14 PM | Shipped |
| Edit | 49 | 26-Sample Client 26 | 05/04/2009 | 05/04/2009 01:17 PM | 05/04/2009 03:06 PM | Shipped |
| Edit | 45 | 10-Sample Client 10 | 05/03/2009 | 05/05/2009 07:17 PM | 05/04/2009 12:00 AM | Shipped |
| Edit | 51 | 10-Sample Client 10 | 05/15/2009 | 05/15/2009 11:31 AM | | Pending |
| Edit | 52 | 10-Sample Client 10 | 05/15/2009 | 05/15/2009 11:36 AM | | Pending |
| Edit | 53 | 10-Sample Client 10 | 05/15/2009 | 05/15/2009 11:39 AM | | Pending |
| Edit | 55 | 10-Sample Client 10 | 05/20/2009 | 05/20/2009 02:45 PM | | Pending |
| Edit | 56 | 85-Sample Client 85 | 06/15/2009 | 06/15/2009 05:48 PM | | Pending |
| Edit | 57 | 410-Sample Client 410 | 06/16/2009 | 06/16/2009 09:18 AM | | Pending |
| Edit | 58 | 490-Sample Client 490 | 06/16/2009 | 06/16/2009 09:46 AM | | Pending |
| Edit | 59 | 10-Sample Client 10 | 06/18/2009 | 06/18/2009 11:57 AM | | Pending |
| Edit | 60 | 10-Sample Client 10 | 06/18/2009 | 06/18/2009 12:08 PM | | Pending |
| Edit | 61 | 13-Sample Client 13 | 07/17/2009 | 07/17/2009 03:48 PM | 07/17/2009 04:27 PM | Shipped |
| Edit | 62 | 21-Sample Client 21 | 07/17/2009 | 07/17/2009 05:15 PM | | Pending |

B) Editing Existing Orders:

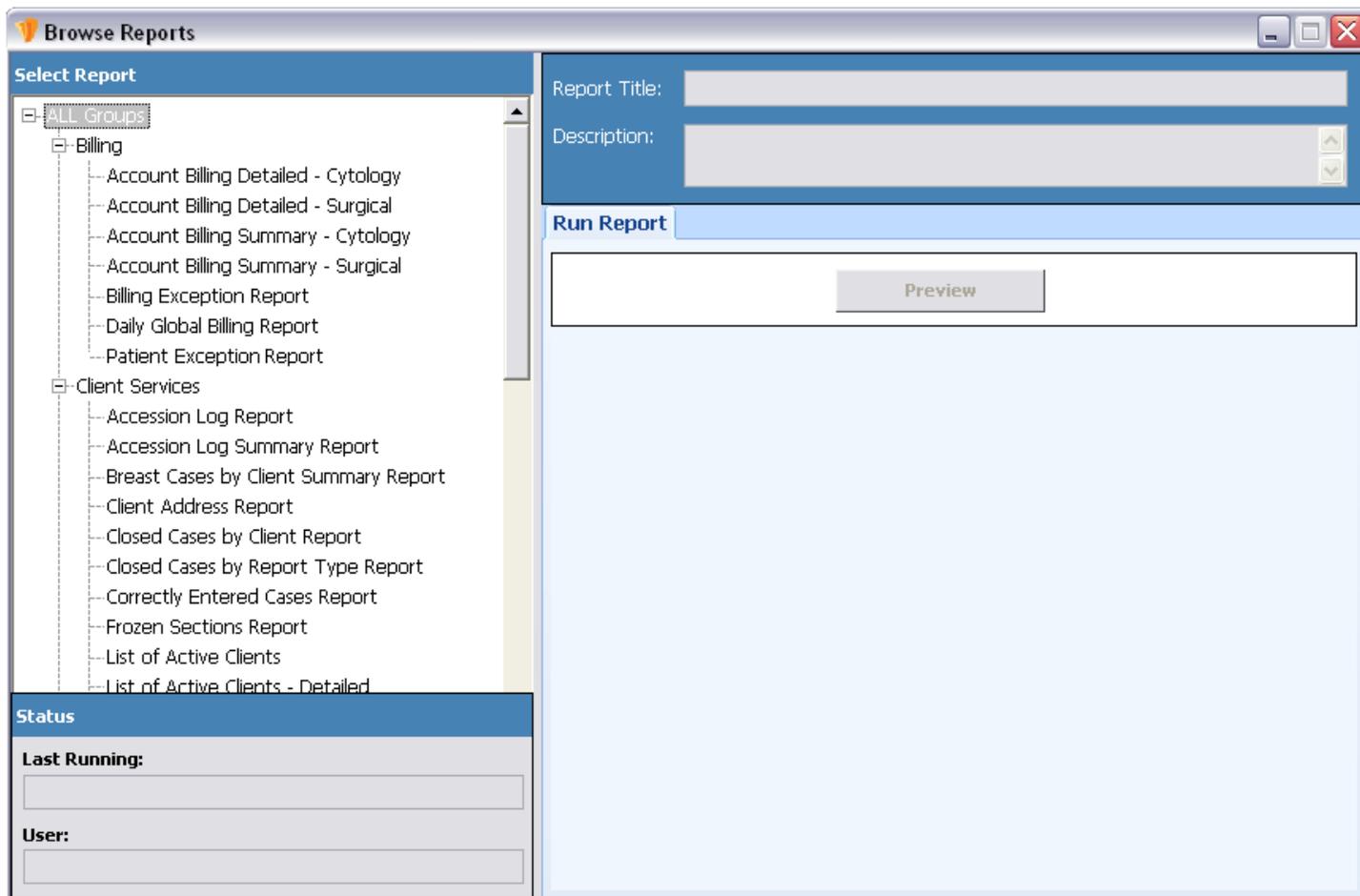
1. Locate the Supply Order by completing the necessary search
2. Select the **Edit** button located to the left of the Requisition ID. Number of the order
3. Perform the necessary edits to the order
4. Click **OK**

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 bock next to the applicable item.
4. Select the quantity of the supply to be ordered.
5. Click **Save New Order**

REPORTING — CANNED REPORTS

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)**.



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

Account Billing Detailed—Cytology, Account Billing Detailed—Surgical, Account Billing Summary—Cytology, Account Billing Summary—Surgical, Billing Exception Report, Daily Global Billing Report, Patient Exception Report

ii. Client Services

Accession Log Report, Accession Log Summary Report, Breast Cases By Client Summary Report, Client Address Report, Closed Cases By Client Report, Closed Cases By Report Type Report, Correctly Entered Cases Report, Frozen Sections Report, List of All Active Clients, List of All Active Clients—Detailed, Missing Accessions, Pathologist Assignment Exception Report, Received Cases by Pathologist and Client Report.

iii. Daily

Error Log Daily Report, Open Cases Daily Report, Open Cases Follow-up Report, Positive Case Report, Transcription Daily Report

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

Cases By Location Report—Detailed, Cases By Location Report—Summary, Lab Productivity Report, Open STAT Cases Report, Test Control Reactivity Report

vi. Marketing

Incidents By Client Errors Report, Incidents By Other Errors Report, Marketing Report, Marketing Summary Report, MTD Summary ABM Report, MTD Summary Report, Sum of Units by Pathologist Report

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.



ACCESSING SYSTEM LOGS

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 screenshot shows the 'Browse Audit Log' window with the following search criteria:

- Accession:** (Empty text box)
- Event Type:** Add Test Order
- User:** All
- Client:** All (Selected by ID)
- Filter by Patient:** (Unchecked)
- Filter by Event Date:** (Checked)
 - From: 1/ 1/2011
 - Thru: 6/ 1/2011

The table below shows the audit records found:

| Event Type | Event Date | User Name | Event Name | Accession Number | Sp Nu |
|------------|--------------------|-----------|----------------|------------------|-------|
| INSERT | 5/25/2011 12:26 PM | Ale, M | Add Test Order | IREL-11-00045 | 3 |
| INSERT | 5/25/2011 12:26 PM | Ale, M | Add Test Order | IREL-11-00045 | 3 |
| INSERT | 5/25/2011 12:26 PM | Ale, M | Add Test Order | IREL-11-00045 | 2 |
| INSERT | 5/25/2011 12:26 PM | Ale, M | Add Test Order | IREL-11-00045 | 2 |
| INSERT | 5/25/2011 12:26 PM | Ale, M | Add Test Order | IREL-11-00045 | 1 |
| INSERT | 5/25/2011 12:26 PM | Ale, M | Add Test Order | IREL-11-00045 | 1 |
| INSERT | 5/25/2011 11:51 AM | Ale, M | Add Test Order | IREL-11-00044 | 3 |
| INSERT | 5/25/2011 11:51 AM | Ale, M | Add Test Order | IREL-11-00044 | 3 |
| INSERT | 5/25/2011 11:51 AM | Ale, M | Add Test Order | IREL-11-00044 | 2 |
| INSERT | 5/25/2011 11:51 AM | Ale, M | Add Test Order | IREL-11-00044 | 2 |
| INSERT | 5/25/2011 11:51 AM | Ale, M | Add Test Order | IREL-11-00044 | 1 |
| INSERT | 5/25/2011 11:51 AM | Ale, M | Add Test Order | IREL-11-00044 | 1 |
| INSERT | 5/25/2011 9:40 AM | Ale, M | Add Test Order | IREL-11-00043 | 1 |
| INSERT | 5/25/2011 9:40 AM | Ale, M | Add Test Order | IREL-11-00043 | 1 |
| INSERT | 5/17/2011 5:57 PM | Ale, M | Add Test Order | IREL-11-00042 | 0 |
| INSERT | 5/17/2011 5:57 PM | Ale, M | Add Test Order | IREL-11-00042 | 0 |
| INSERT | 5/17/2011 4:45 PM | Ale, M | Add Test Order | IREL-11-00042 | 0 |

Records found: 408

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 range for the data logs
3. If you prefer results to be filtered by event date or by patient, check the corresponding box
4. Click the **Search** button.

MANAGING NOTES

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,**

| Created Date | User Name | Type of Note | Note Text |
|--------------|-----------|--------------|-----------|
|--------------|-----------|--------------|-----------|

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**

UNLOCKING CASES

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 screenshot shows a window titled "UNLOCK CASES" with a search bar and "Preview" and "Close" buttons. Below the search bar is a table with the following data:

| Accession | dtmCollected | dtmReceived | dtmReported | LockUse |
|----------------|--------------|-------------|-------------|---------|
| 2DCF-07-33333 | 6/14/2007 | 6/14/2007 | (null) | 120 |
| 1REL-07-44466 | 7/2/2007 | 7/2/2007 | (null) | 66 |
| 1REL-07-44514 | 11/18/2007 | 11/18/2007 | (null) | 66 |
| 1REL-08-00015 | 4/21/2008 | 4/22/2008 | (null) | 120 |
| 1REL-08-00024P | 5/19/2008 | 5/19/2008 | (null) | 212 |
| 1REL-08-00037 | 6/27/2008 | 6/27/2008 | (null) | 120 |
| 1REL-08-00042 | 7/1/2008 | 7/1/2008 | (null) | 120 |
| 1REL-08-00052 | 10/6/2008 | 10/6/2008 | (null) | 120 |
| 2DCC-08-00003 | 10/6/2008 | 10/6/2008 | (null) | 130 |
| 1REL-08-00065 | 10/14/2008 | 10/14/2008 | 10/15/2008 | 212 |
| 1REL-08-00079 | 10/29/2008 | 10/29/2008 | (null) | 66 |
| 1REL-09-00007 | 1/26/2009 | 1/27/2009 | (null) | 66 |
| 1REL-09-63636 | 3/25/2009 | 3/25/2009 | (null) | 120 |
| 2REL-09-00004 | 3/31/2009 | 3/31/2009 | (null) | 130 |
| 2REL-09-00005 | 4/13/2009 | 4/13/2009 | (null) | 66 |
| 1REL-09-00005 | 5/15/2009 | 5/15/2009 | 11/3/2009 | 120 |
| 1REL-09-63643 | 5/26/2009 | 5/26/2009 | (null) | 120 |
| 2REL-09-00010 | 6/4/2009 | 6/4/2009 | (null) | 66 |
| 1REL-09-12347 | 6/5/2009 | 6/5/2009 | (null) | 66 |
| 1REL-09-63656 | 6/25/2009 | 7/16/2009 | (null) | 120 |
| 2REL-09-00031 | 9/5/2009 | 10/5/2009 | (null) | 130 |
| 1REL-09-66682 | 12/4/2009 | 12/4/2009 | (null) | 66 |
| 1REL-10-00689 | 3/5/2010 | 3/5/2010 | (null) | 120 |
| 1wPC-10-00109 | 3/15/2010 | 3/23/2010 | (null) | 130 |
| 1CON-10-00018 | 3/31/2010 | 4/1/2010 | (null) | 134 |
| 1CON-10-00020 | 3/31/2010 | 4/2/2010 | (null) | 66 |
| 1CON-10-00021 | 3/31/2010 | 4/2/2010 | (null) | 66 |
| 1CON-10-00022 | 3/31/2010 | 4/2/2010 | (null) | 66 |
| 1REL-10-00712 | 3/30/2010 | 4/2/2010 | (null) | 134 |
| 1CON-10-00035 | 3/30/2010 | 4/7/2010 | (null) | 131 |
| 1REL-10-07597 | 5/24/2010 | 5/25/2010 | (null) | 120 |
| 1REL-10-12364 | 8/17/2010 | 8/23/2010 | (null) | 130 |
| 1REL-10-18748 | 8/20/2010 | 8/24/2010 | (null) | 130 |
| 1REL-10-18751 | 8/20/2010 | 8/24/2010 | (null) | 130 |
| 1REL-10-18754 | 8/20/2010 | 8/24/2010 | (null) | 130 |

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.



MANAGING KEYBOARD SHORTCUTS

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:

Patients Module

Alt N—Opens the Patient Toolset
Alt E—View Patients
Alt X—Exit

Cases Module

Alt N—New Case
Alt O—Show Open Cases
Alt C—Show Closed Cases
Alt Q—Quick Search
Alt X—Exit

Utilities Module

Alt I—Incidents
Alt O—Electronic Orders
Alt T—Additional Tests
Alt A—Audit
Alt N—Notes
Alt U—Unlock Cases
Alt S—Keyboard Shortcuts
Alt R—Release

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





VIEWING SYSTEM UPDATES & RELEASES

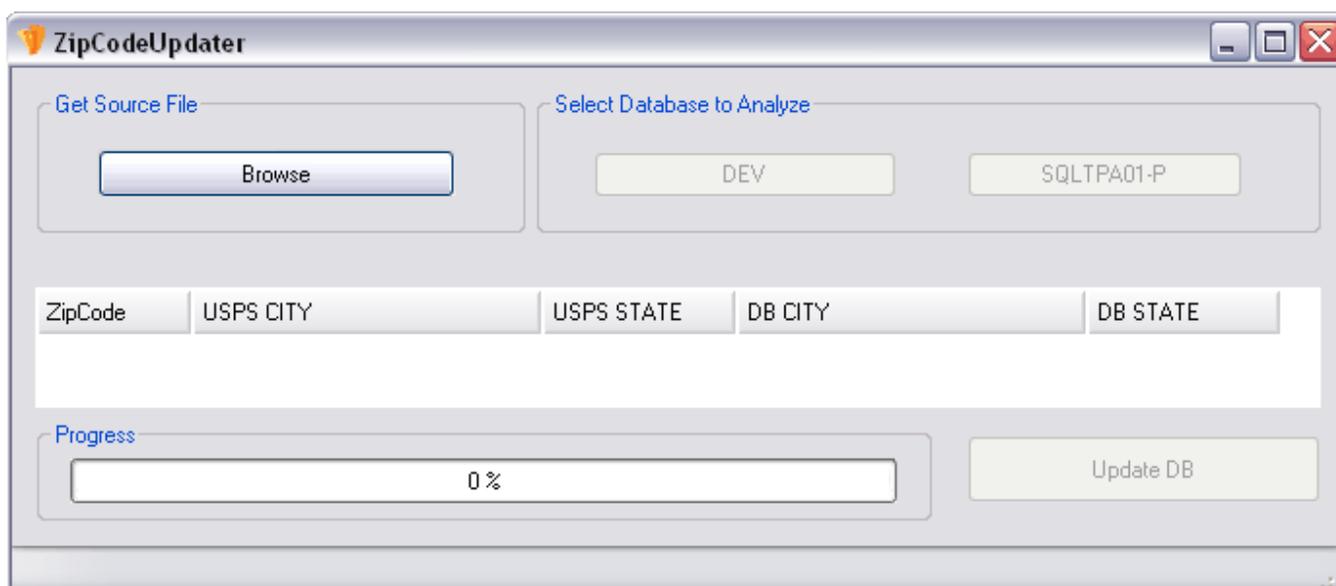
20. By Selecting the **Release** Button within the Utilities Module, MS Internet Explorer will open, detailing all of the latest releases of the PathX LIS Software and the enhancements which were made. The Release Toolset serves only one primary function: **A)** Viewing programming and development changes 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 on-
ly." />
  <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 Pa-
tient Account Number from the electronic files into the field 'Requisition #' during accession-
ing." />
  <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 Ac-
count' at the client level to be able to print the Patient Account Number in the Pathology Re-
ports, rather than always the Client Account Number." />
  <Update Type="Change" Title="Pathology Reports" Description="Added setting 'Detail Keep To-
gether' 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
```

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ZIP CODE MANAGEMENT

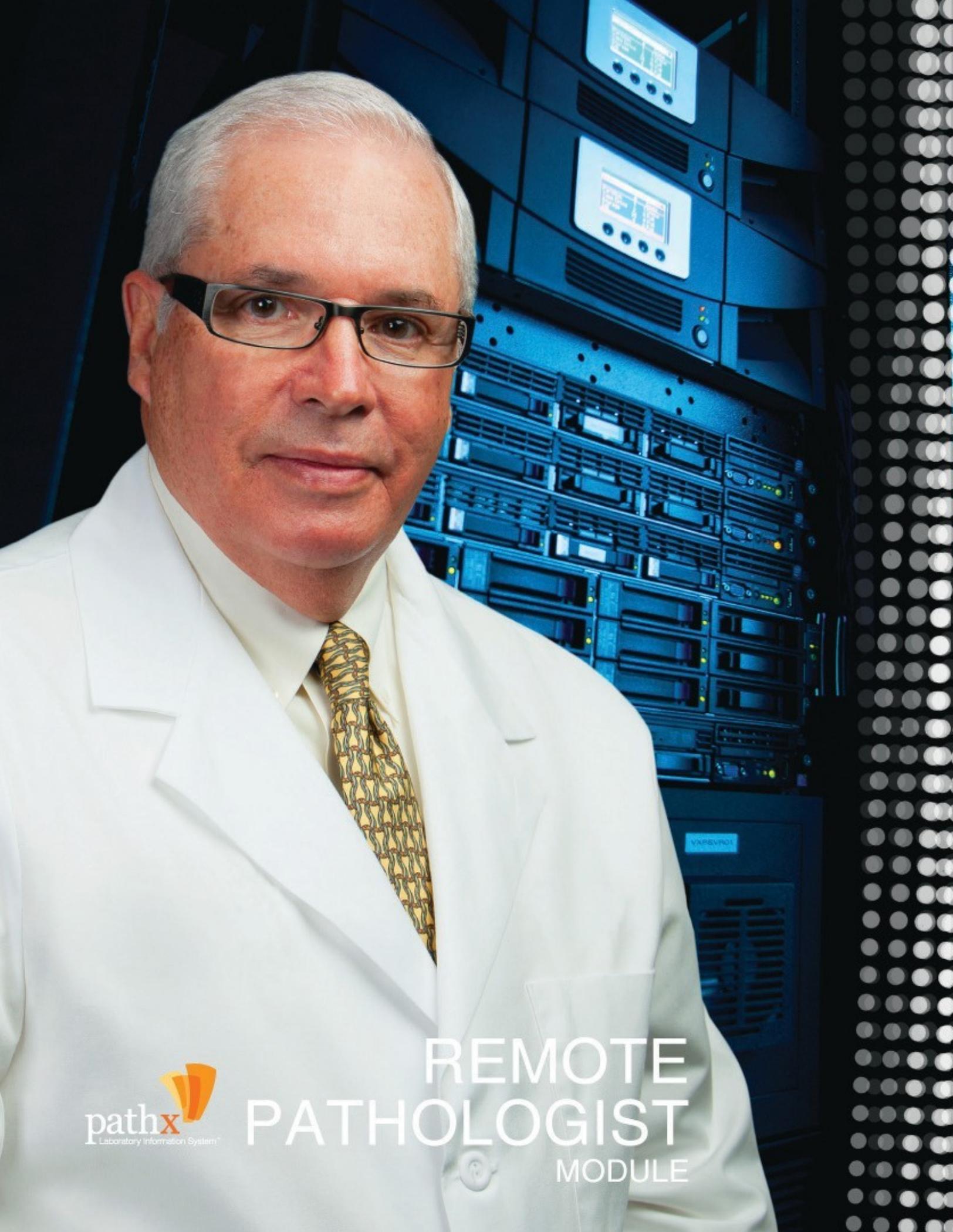
21. By Selecting the **Zip Code Updater** Button within the Utilities Module, the **Zip Code Updater** window, as seen below, will appear. The Zip Code Updater toolset performs one primary function: **A) Updating Regularly Received Zip Code Updates**



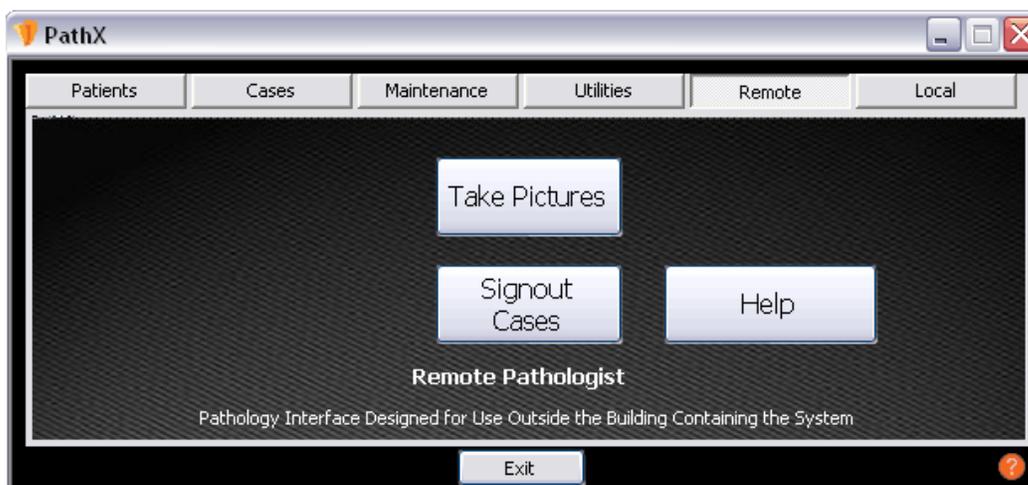
The Zip Code Updater Toolset allows users to the ability to quickly load files containing zip codes which need to be updated, revised or newly entered into the PathX system.

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

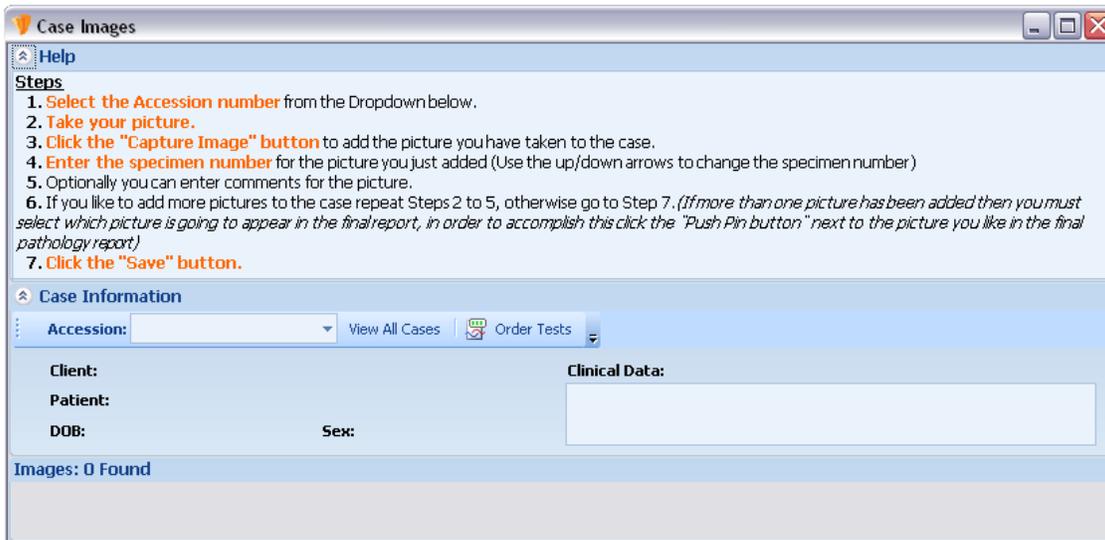
Allows users the ability to enter assay results for Breast Prognostic and SISH tests.

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.

MANAGING DIGITAL IMAGERY

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 be 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.

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.

pathx

EDITING CASES

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

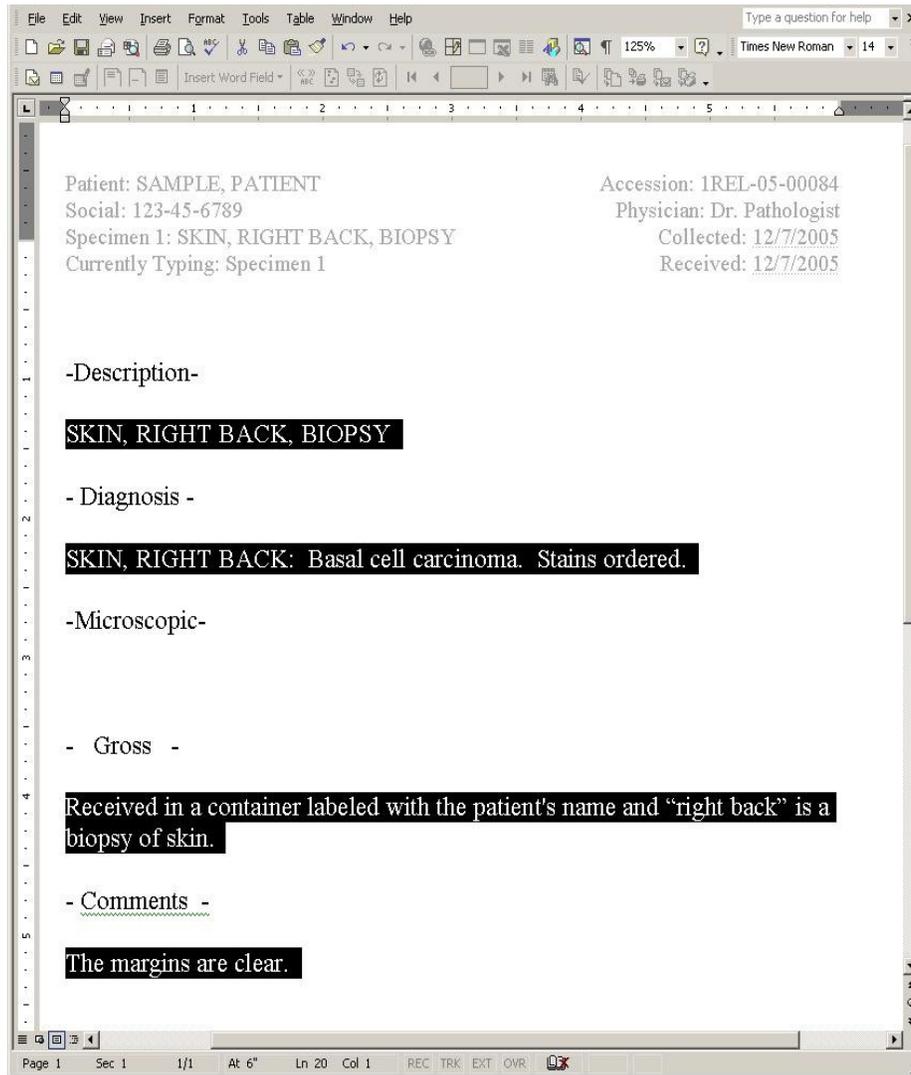
The screenshot displays the 'Specimens' window in the PathX Laboratory Information System. The window title is 'Specimens' and it features a toolbar with 'Auto-Corrects', 'Add Specimen', 'Delete Specimen', 'CPT', and 'Save' buttons. The 'Case Information' section includes: Accession: 1REL-10-19081, Patient: SAMPLE, PATIENT (M, 109), Clinical Data: NEW CASE FOR TESTING ..., Req. Physician: DR. EUGENE A WARD, M.D. (Phone: 813-972-1654), and Client: Sample Client 10. The 'Specimen 1' section shows: Organ: Skin, Description: DESCR SPEC 1, Procedure: Shave, and CPT: 88305. Below this are three text areas: 'Gross Description', 'Microscopic Description' (with a 'Use as Image Caption' checkbox), and 'Diagnosis' (with a 'Positive' checkbox). At the bottom of the specimen section, there are input fields for 'BLOCKS Out: 1' and 'H&E Slides: 2'. On the right side, there are two panels: 'Images' (showing 'Images: 0 Found' and a 'Capture Image' button) and 'Lab Work' (with an 'Add AFS' button and a table for 'Frozen Section', 'Frozen Section Additional', and 'Permanent' with 'Slides' counts). At the bottom of the window is a 'Physician Comments' text area.

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.

pathx

EDITING CASES



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**

Pathologist Queue (15 Cases found)

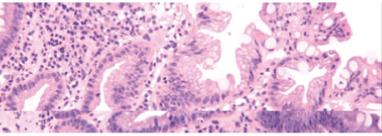
View: All Open Cases CPT Sign Out

| Diag. | View | Accession | Patient Name | Client Name | Spec# | Received Date | Report SubType |
|-------|------|----------------|--------------|-------------------|-------|---------------|----------------|
| Edit | Case | 1DIA-07-12345 | J, DARLENE | Sample Client 218 | 2 | 05/21/2007 | Miscellaneous |
| Edit | Case | 1REL-08-00001 | J, DARLENE | Sample Client 10 | 2 | 01/02/2008 | Gyn Histology |
| Edit | Case | 1REL-08-00015 | J, DARLENE | Sample Client 10 | 1 | 04/22/2008 | Dermatology |
| Edit | Case | 1REL-08-00024P | J, DARLENE | Sample Client 10 | 8 | 05/19/2008 | Prostate |

| | | | | | | | |
|---|--|---|--|--|-----------------------------|--|---------------------|
|  | | Test Lab, LLC 5747 Hoover Blvd. TAMPA, FL 33634 Phone: 888-747-9576 Fax: 813-490-7268 | | Patient Name J, DARLENE | | Accession Number 1DIA-07-12345 | |
| Sample Client 218 123 Acme Rd. LARGO, FL 33770 | | (727) 581-8767 | | Sex F | Age (DOB) 42 (9/17/1964) | Account Number 218 | Chart Number 123 |
| | | | | Requesting Physician UNKNOWN UNKNOWN, UNKNOWN | | Received 05-21-2007 | |
| | | | | Referring Physician | | Reported | |

Clinical Data
 ABDOMINAL PAIN

PATHOLOGY REPORT



COMMENTS
 Phys Comments Patient Sample

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.

ANATOMIC LABORATORY INFORMATION SYSTEM



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