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# CentraBytes

## Workflow: Sample status management and filters

Welcome to CentraBytes, a monthly tutorial on how laboratories around the world are applying the power of Siemens' CentraLink™ Data Management System to improve workflow and quality.

Our topic today is the use of visual cues to make workflow monitoring simple and efficient.

Answers for life.

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### Learning objectives

1. Understand how visual cues can help manage workflow by drawing your attention to where action is needed
2. Learn how to customize visual cues on Siemens' CentraLink™ Data Management System

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We will show you examples of how visual cues can help you manage workflow by directing your attention to where action is needed, and how you can customize visual cues on the CentraLink system to meet your lab's specific needs.

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### Achieving uninterrupted workflow

Status

"I need visibility of the testing process in my lab."

Priorities

"I need to keep track of my most important tests. . .as defined by me."

Action

"Information must be actionable."

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In today's busy lab environments and with the demand to deliver quality test results on time, you need a simple and efficient way to keep track of your testing process to see where the critical tests and samples are, when you need to take action, and what you need to do.

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## Sample Status Overview: An interactive visual tool

Interactive Sample Status Overview window provides one-click navigation to the patient samples that meet the monitoring criteria.

Color cues communicate level of urgency.

Sample ID	Priority	Patient ID	Collection Date/Time	Physician ID	Status
140110100	Routine	NA	01/10/2014 08:25	?	REV
140110101	Routine	EN	01/10/2014 08:10	?	REV
140110102	Routine	FG	01/10/2014 08:10	?	REV
140110103	Routine	PN	01/10/2014 08:30	?	PND
140110104	Routine	GC	01/10/2014 08:05	?	PND
140110105	Routine	JB	01/10/2014 08:40	?	PND
140110106	Stat	JP	01/10/2014 08:40	?	PND
140110108	ASAP	JP	01/10/2014 08:54	?	PND

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Visual cues allow you to immediately recognize the items that require attention and the level of urgency. For example, the “Sample status overview” window in the CentraLink workspace gives you key information at a glance. You can see which samples need your attention and click to see more details, all based on criteria you set.

Notice the use of the color red to highlight the Stat patient sample. It lets you know at a glance that this is the one sample that needs your attention the most. You set the criteria, and you choose the colors.

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## Sample Status Overview with customized counters

Track workflow processes with My Counters, for example, any Stat sample containing an order for a HIV test.

Sample ID	Priority	Patient ID	Collection Date/Time	Physician ID	Status
140110100	Routine	NA	01/10/2014 08:25	?	REV
140110101	Routine	EN	01/10/2014 08:10	?	REV
140110102	Routine	FG	01/10/2014 08:10	?	REV
140110103	Routine	PN	01/10/2014 08:30	?	PND
140110104	Routine	GC	01/10/2014 08:05	?	PND
140110105	Routine	JB	01/10/2014 08:40	?	PND
140110106	Stat	JP	01/10/2014 08:40	?	PND
140110108	ASAP	JP	01/10/2014 08:54	?	PND

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Your “Sample status overview” screen is your dashboard. If the dashboard shows a zero, you know there is no need for action. Once a number appears, click to see more details and take action accordingly. You can also define the interval time when information is automatically refreshed, the minimum being one minute.

On the right side, the section called “My counters” allows you to customize your monitoring criteria by creating filters. How would you create a filter? It’s very easy. On the “Sample status overview” window, click on the box with three dots to open up a “Sample query.” Choose from the options to define your filter conditions.

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## Creating a query in the customized counter

The image shows two screenshots of the 'Sample query' window. The left screenshot shows the 'Basic' tab with the following fields: Sample ID, US channel, LAS (tag reject results), Minimal status (Pending), Minimal priority (Stat), Test group (HIV), Collected from, to, Species, Patient identifier, Patient last name, Type, Instrument group, and Instrument. The right screenshot shows the 'Advanced' tab with the following fields: Minimal status minutes, Minimal status minutes, Physician identifier, Physician last name, Patient location, Slide request (Not required), Acquired from, to, Check LAS update required, LAS channel, Not reported, Filter, Max sample count, and Spl criterion (Sample ID).

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In this example, we are interested in samples that contain an order for an HIV test and have a priority of Stat. To do this, we go to the "Sample query" window. We find and set the "Minimal priority" drop-down menu to Stat. Next, in the "Test" field, specify the HIV test. Another more advanced query that your local specialist can configure for you is to implement a script in the "Filter" field on the "Sample query" window to allow you to monitor any samples that contain a Troponin test that is in "Pending" status for more than 30 minutes.

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## Customize filters to access relevant information

The image shows a screenshot of the 'Sample status overview' window. It includes a table with columns for Total, STAT, and My counters. The 'My counters' section has filters for 'Pnd Tropp > 30m' (10), 'Stat HIV' (1), 'Pnd > 8hrs' (4,513), and 'Tropp in Review' (1). An orange callout box points to the 'My counters' section with the text: 'Customize filters in "My Counters" to access relevant information.'

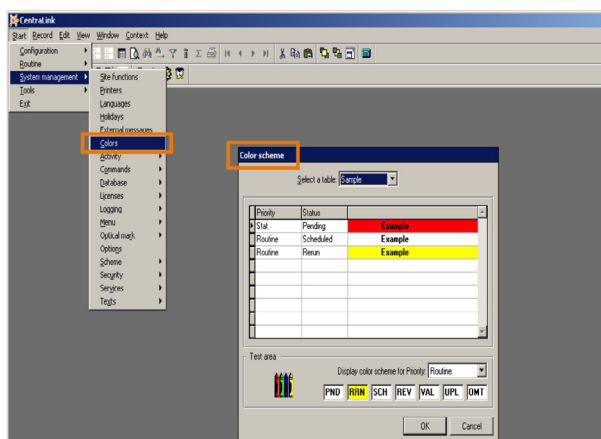
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Finally, type in a short descriptive label for the "My counter" monitoring filter.

The counters in the normal "Sample status overview" window are interactive, so you can see anything that has a value greater than zero. If you put your mouse on one of the counters and click on it, you will open a browser window listing the samples that meet the criteria defined by that filter.

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## Options for using color as a visual cue



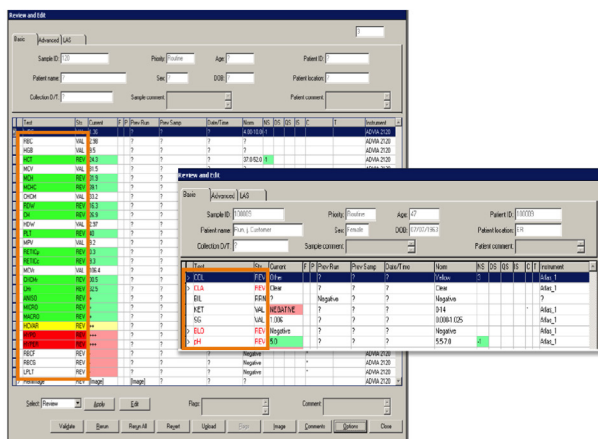
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Let's take a look at how you can customize colors on CentraLink.

First click on "Start" and choose "System management." From the drop-down options, select "Colors." Choose your colors from the color scheme, based on a combination of priority and status.

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## Options for using color as a visual cue



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Another example is the "Review and Edit" window when viewing the results on a particular patient sample. You can customize and color code the results based on the severity assigned, for example, based on the result range or based on associated instrument flags.

You can also choose to color coordinate the test mnemonic or the test name to match the severity of that result. Another option is to color coordinate only those results that are held in review. So in this instance, instead of a background color, we assign a font color (red) to names of the tests that require review.

The overall benefit from visual cues is that they give you a more efficient review of the testing process and where you need to take action.

As you can see, visual cues are a powerful way to make workflow monitoring simple and efficient. And it's easy to customize these cues to your lab's specific needs.

Feel free to download a copy of this presentation to share with your colleagues. Most importantly, practice is key. Start by testing some of the ideas we shared with you today.

Thank you.

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