Infectious Disease
Order Submission by Remote Order Entry (ROE)

Reference Guide
New York State Department of Health
Wadsworth Center
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Overview

The Wadsworth Center Laboratory Information Management System (CLIMS) is a specimen tracking and reporting system used by the New York State Department of Health (NYSDOH) Wadsworth Center, Division of Infectious Diseases (DID) and Division of Environmental Health Sciences (DEHS) laboratories. It is accessible via the Health Commerce System (HCS) on the NYSDOH secure internet.

CLIMS allows a submitter to track specimen receipt and access test results for the Arbovirus, Bacteriology, Biodefense, Chlamydia, Diagnostic Immunology, Gonorrhea screening, Mycobacteriology, Mycology, Parasitology, Rabies, Syphilis, Viral Encephalitis and Virus Reference and Surveillance Laboratories.

CLIMS is also used by all DEHS laboratories, which include the Asbestos, Environmental Bacteriology, Bio-Organic, Organic, Inorganic, Laboratory Response Network – Chemistry (LRN-C), Nuclear, Medical Marijuana and Trace Elements laboratories.

Remote Order Entry (ROE) is a feature that allows the submitter to electronically submit test orders. The submitter can enter demographic data, search for and request testing, and print the completed requisition form to be sent with the specimen/sample for submission. The submitter may enter orders for multiple patients at a time as well as individual patient orders. To allow submitters to track a specimen/sample through the testing and reporting process, an accession number is automatically generated and assigned to the specimen/sample. The accession number uniquely identifies the specimen/sample through the entire process.
Getting Started

Log in to the Health Commerce System (HCS):
https://commerce.health.state.ny.us

Select CLIMS from the list of My Applications on the left.

**Note:** First time users will be prompted to select their e-mail preferences.

E-mail notifications are sent twice daily when new reports are posted on HCS that the user has access to.

**Note:** list of applications may vary based on permissions
Specimen Reports - page with links to test results

Specimen Receipts - page with links to acknowledgements by the Wadsworth Center for received and accessioned samples

Management Reports - page of available Management Reports for Rabies information

Remote Order - page to submit or review requests for DID Clinical Testing, Rabies Animal Testing, and DEHS Environmental Testing

Specimen Summary - page containing links to Requests, Receipts, or Reports for samples submitted, received, or reported within the last 90 days

Report Notification – page for viewing reports from the New York City reports processing

My Preferences - allows user to maintain e-mail notification settings

Note: list of links may vary based on permissions
Remote Order Entry Home

Remote Order Menu

Order Testing

<table>
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<tr>
<th>Division of Infectious Diseases</th>
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<tr>
<td>(Human, Animal, Food, Environmental)</td>
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Place Order (DOH-4463) - page to select the type of DID order to place single or multiple orders

Upload IDR or COVID Spreadsheet – page to upload multiple Infectious Disease Requisition (IDR) orders via spreadsheets after validation and addressing any errors or updates as necessary

Upload HL7 File - page to upload HL7 files as directed by staff at Wadsworth Center

Download IDR Spreadsheet Template - page to obtain a blank IDR template and review instructions/training material on how to use the IDR functionality

Order Management - page to view and update orders, grouped by status, including In-Progress, Pre-Collection, Submitted, and Received/Accessioned

Show Pre-Collection Order – (legacy) page for viewing and accessing orders that have blank or future Collection Dates

Show Orders Pending Receipt – (legacy) page for viewing and accessing orders that have been Submitted, but have not yet been received by the Wadsworth Center

Show Pending Shipments – (legacy) page for viewing and accessing orders containing multiple patients in one shipment that have been Submitted, but have not yet been received by the Wadsworth Center

Reference Guide – page for viewing instructions/training material on how to use the ROE functionality

Search Catalog – page for searching current Test Catalog to view individual tests, instructions, warning, and other information from the catalog
Order Management

The Order Management screen displays all of the orders for a facility on one screen, separated into different tabs based on the status of the order:

- **In Progress** – orders that have been started, but have not been Submitted
- **Pre-Collection Orders** – orders that have been Submitted, but have blank or future Collection Dates
- **Submitted** – orders that have been Submitted and have been shipped to Wadsworth Center, but have not yet been Received/Accessioned
- **Received/Accessioned** – orders that have been physically received by Wadsworth Center and are being processed, but do not have released results

Filter will search all orders and display only the matching records.

Orders in the grid default to Summary View but can be changed to Legacy View.

Selecting the Tracking ID allows an order to be viewed/edited.

Orders with multiple facilities must select a facility to work with.

Users with multiple facilities must select a facility to work with.

Selecting the ID for In Progress Orders allows the order to be continued to be worked on.

Order Type distinguishes between DID Clinical, Animal, Food, and Environmental orders.

Staff indicates the short name of the staff who made the last update.

Collapse All will collapse all expanded orders at once.

For orders with multiple patients, pagination controls can be used to view additional patients.

Selecting the Tracking ID allows an order to be viewed/edited.

The Order Management screen displays all of the orders for a facility on one screen, separated into different tabs based on the status of the order:
Order Management

Summary View is the default for all order types. Orders are displayed grouped by Tracking ID and ordered by Last Updated. All columns are sortable by clicking the column header.

All tabs on Order Management can be toggled between Summary and Legacy display styles to view orders.

- **Summary View** - all records associated with an Order are grouped under the shared Tracking ID which can be expanded to view individual record details
- **Legacy View** – all orders are listed by Tracking ID and Accession ID, the same as in the previous ROE application

**Screen Display**

For the Order Management and Place Order screens, the screen is displayed based on a number of factors. Such factors include, but not limited to:

- Monitor size
- Screen resolution
- Browser
- Zoom setting in Browser

Because these settings can change how the screens will be displayed, users can adjust the settings to their personal preference. For example, the two images below show the Order Management screen at different levels of browser zoom.

**Zoom at 100%**

**Zoom at 75%**
ECLRS Import

The ECLRS Import is available for new Human Specimen orders. It allows submitted orders from the Electronic Clinical Laboratory Reporting System (ECLRS) to be imported into ROE.

Users must enter the ECLRS Accession/Specimen number, or multiple separated by commas, and select Import. When a match is found, the user will be taken to the Patient Grid to review and update the Demographic and Test information before submission.

Note: ECLRS import may only be used if no Patients or Test Template have been added; once an ECLRS import has been done, the Test Template will no longer be available.
Test Template

Test Templates are a set of information that is automatically applied to each patient entered in an order. This allows multiple patients to be entered in an order without having to re-enter some information multiple times. Test Templates can also be used for a single patient, allowing the entering of the test information before the patient information. The Individual Patient Tests screen can be used to enter test information after the patient data is entered for single and multiple patients.

In the Test Template, any information entered will be added to the Individual Patient Tests screen when a new patient is added. The test information that comes from a Test Template can be edited freely for any individual patient without effecting other patients or the Test Template itself.

Any fields on the Test Template screen can be used to create a Test Template, no validation is necessary on creation. Once a Test Template is applied to a patient, the standard validation is used before an order can be Submitted.

Example Test Template

Test Templates can only be created when no patient has been added yet, including importing patients from ECRLS. Once the first patient has been added, the Test Template can no longer be modified on the Test Template screen. The Individual Patient Tests screen for each patient may still be used to edit Test information from the Test Template for the individual patient.

For details on the information on the Test Template screen, refer to the Individual Patient Tests section.
**Patient**

- **Control to Collapse and Expand all Accordion sections**
- **Continue back to the Patient Grid**
- **Add tests to current Patient. See Individual Patient Tests section for more details.**

**Note:** Patient State, County, and Zip will be validated together based on the selected State.
- Non-NY State – County defaults to Out-of-State and Zip is not validated
- NY State – County may not be Out-of-State and if Zip is entered, it must be valid for the County
Patient

Dates will be validated to prevent conditions that could not be possible, with appropriate validation messages displayed. Users will need to correct the dates or clear them out before the order can be Submitted. Orders can be saved with invalid dates, but all errors must be resolved before Submission.

**Birthdate**
Before the Date of Death, Collection Date, Onset Date, Relevant Treatment Date, Relevant Immunization Date

**Onset Date**
After the Birthdate
Before the Date of Death

**Date of Death**
After the Birthdate, Collection Date, Onset Date, Relevant Treatment Date, Relevant Immunization Date

**Relevant Treatment and Immunization Date**
After the Birthdate
Before the Date of Death
Patient List

The Patient List will show all patients added to the Order, allowing both the Patient Details screen and the Individual Test screen to be accessed for the patient. Entries with errors will be indicated, allowing those errors to be resolved before submission.

- **Search to filter patient list**
- **Collection Date and Time are editable in the grid**
- **Pagination controls how many patients display per page**
- **Autogenerate ids for all blank Submitter Specimen Ids**
- **Search to filter patient list**
- **Shipping Address is populated by all addresses from all tests in the order**
- **Save can be used at any time**
- **All errors must be resolved before going to the Review screen**
- **Select red “i” to view all missing items for a patient**

**Note:** entered data is automatically saved when changing screens, but users must **Save** any changes made on the Patient List before closing the order when not going to the Review screen.
Individual Patient Tests

The Individual Patient Tests screen will display the tests for any given patient, including the special instructions and Specimen Source for any entered data.

Selecting a Test will automatically list the associated Suspected Agent. This will also allow for other Tests to be added to a given Specimen or additional Specimen be added to the Patient. Manually entered Suspected Agents can be recorded in the appropriate text field.

Note: Required Specimen Types and Specimen Source Types for individual Tests are determined by the catalog entry for the individual Test. Multiple Tests on the same Specimen will follow these rules. Warning informational messages will be displayed if the options selected do not match the catalog entry described rules.
Review Screen

The review screen displays a summary of all Samples in the Order prior to submission. Individual records can be expanded to view all entered information for final review by selecting any Sample associated with the Patient. Selecting the record again will collapse the record details section.

- **Summary of single sample in order**
- **Samples with multiple tests display all tests entered**
- **Returns user to Patient List**
- **Submits the order**
- **Selecting the Specimen Id opens the detail section**
- **Collapse and Expand all Accordion sections**

**Note:** only fields with information will be displayed

**Note:** all Specimen and Tests associated with Patient will be displayed
Shipping Manifest

For Submitted orders that are not Pre-Collection, a Shipping Manifest will be displayed. The Shipping Manifest must be printed and included with the samples when they are shipped to Wadsworth Center.

Accession Ids for all Samples in order

Shipping Id

Outbreak IDs, if present, will be printed on the Shipping Manifest

Comments will be included on printed Shipping Manifest

Opens Print dialog box