

LOGGING IN TO MAYOACCESS

1. Open MayoACCESS from www.mayocliniclabs.com.
2. Type user name and password.
Note: Passwords are case sensitive and must have a minimum of six alphanumeric characters.
3. Click **Login**.
Note: New users will be prompted to change their password and set a security question with the first login to the MayoACCESS system.

CHANGING THE USER'S PASSWORD

1. From the User menu, select **Change Password**.
2. In the **Old Password** field, enter your old password.
Note: Characters are masked as they are typed.
3. In the **New Password** field, enter a new password.
Note: Passwords are case sensitive and must have a minimum of six alphanumeric characters.
4. In the **Confirm Password** field, re-enter the new password.
5. Click **Save New Password**.
Notes:
 - The new password will be effective at the user's next login.
 - Passwords expire after 180 days.

ENTERING AN ORDER

1. From the Orders menu, select **New Order**.
2. Enter the patient's medical record number.
3. Press **Tab**.
Note: Fields populate with existing patient data. Fields will be blank for new patients. If the patient listed is not correct, click **Clear** and enter the required information (denoted by highlighted fields).
4. Fill in the required information (denoted by highlighted fields).
5. Click **Add Tests**.
6. In the Keyword field, enter the Test ID or a keyword.
7. Press **Enter** to search for your keyword. A drop-down list appears when the search is complete.
8. Select the test to order from the list.
9. Click **Add Test to Order** to add the test. A confirmation pop-up appears.
10. Click **OK** to close the pop-up.
11. At the top of the screen, click **Clear** to clear your search.
12. Repeat steps 6-11 to add more tests to the order. If no more tests are required, continue to Step 13.
13. When all tests have been added, click **OK**.
14. When test selection is complete, click **Continue**.
Notes:
 - The Questions tab opens automatically when additional information is required. Enter the requested information. Click **Continue** to save the order. The order will automatically be queued for batching.
 - At completion of the order, a message stating the order was successfully submitted appears. Click **OK** to return to the **New Order** window.
 - If your system is configured to print labels automatically, they will print after the order is placed.

SET CALLBACKS/SET FAXBACKS

Manual Order

1. From the Orders menu, select **New Order**.
2. Select the **Set Callbacks** and/or **Set Faxbacks** checkbox.
3. Complete the order using the **Entering an Order** section as a guideline.
When finished, a text window will open:
 - If **Set Callbacks** was selected, enter the phone number, select which test(s) require a callback, and click **OK**.
 - If **Set Faxbacks** was selected, click the **New Fax Number** link. The fields will be pre-populated. Select the fax number from the pre-approved list. Click **Save Fax Number** to save the fax number. Click **Close**.

Integrated (Interface) Order

1. From the Orders menu, select **Batch Processing**.
2. Select order to be called or faxed.
3. In the middle of the screen, click **Set Callback** or **Set Faxback**.
Note: If these options are not visible, add them by using the Smart Menu (☉).
 - If **Set Callback** was selected, enter the phone number and select which test(s) require a callback and click **OK**.
 - If **Set Faxback** was selected, click the **New Fax Number** link. The fields will be pre-populated. Select the fax number from the pre-approved list. Click **Save Fax Number** to save the fax number. Click **Close**.
Note: Contact Mayo Clinic Laboratories to add a fax number to the pre-approved list.

PRINTING ORDER LABELS

Manually print or re-print order labels. Choose your starting screen and follow the instructions provided.

Lab Order Search Screen

1. From the Orders menu, select **Order Search**.
2. Use the Search Criteria tab to search for the order.
3. Select the order that requires labels.
4. Hover over the Smart menu icon (☉).
5. Click the **Specimen Labels** link. Labels will print automatically.

Batch Processing Screen

1. From the Orders menu, select **Batch Processing**.
2. In the Batch column, select the checkbox for the order(s) that require labels.
3. Click the **Set of Labels** link. Labels will print automatically.

Batch Set List

1. From the Orders menu, select **Batch Set List**.
2. Select the batch set that requires labels.
3. Click the **Set of Labels** link. Labels will print automatically.

EDITING AN ORDER PRE-BATCH

1. From the Orders menu, select **Batch Processing**.
2. Select the order that requires editing.
3. Click the **Edit Order** link.
4. Edit the order as needed.
5. Click **Continue** to proceed with the changes on each screen. A confirmation pop-up appears.
6. Click **OK**.

CANCELLING AN ORDER PRE-BATCH

1. From the Orders menu, select **Batch Processing**.
2. Select the order.
3. Click the **Cancel Tests** link. The cancel tests dialog box appears.
4. Select the test to be cancelled.
5. Click **Cancel Tests**. The cancellation pop-up appears.
Note: Click **Cancel All** to cancel all tests.
6. In the **Cancellation Reason** field, enter the reason for cancellation.
7. Click **OK**. A confirmation pop-up appears.
8. Click **OK** to close the pop-up.
9. Repeat steps 4-8 to cancel additional tests. If finished, continue to Step 10.
10. Click **Exit** to close the cancel tests dialog box.

CLOSING A BATCH

1. From the Orders menu, select **Batch Processing**.
2. In the Batch column, check the box to select the order(s) to be included in the batch. Check the **Select All** box to select all orders.
Note: Batching status allows the user the ability to view at a glance if an order is ready to batch or not.

Green: This order is ready to be batched and sent to the laboratory.

Yellow: This order is incomplete. It is missing relevant information such as answers to questions.

Red: This order is unbatchable due to an interface issue (e.g., missing test code).

3. *Optional:* Click the **Preview Batch Set** link to preview the batch. This link allows multiple batch options:
 - View and/or print the entire set of batch sheets.
 - Print labels.
 - View and/or print a Missing Information Report.
 - Select and print a batch sheet.
 - Close the batch.

Note: To view the batch sheet without printing it, click on the arrow that pops up on the center toolbar; this will open a menu to select view only.

4. On the Batch Processing screen, click **Close Batch Set**.
Note: If your system is configured to print labels and batch sheets automatically, they will print after the order is closed.

ORDER CANCELLATION—BATCH CLOSED

Only orders with a status of **Sent to Lab** can be canceled.

1. From the Orders menu, select **Order Search**.
2. Use the Search Criteria tab to search for the order.
3. Select the order to cancel.
4. Click the **Cancel Tests** link. The Cancel Tests dialog box appears.
5. Select the test to be cancelled.
6. Click **Cancel Tests**. The cancellation pop-up appears.
Note: Click **Cancel All** to cancel all tests.
7. Click **OK**. A confirmation pop-up appears.
8. Click **OK** to close the pop-up.
9. Click **Exit** to close the cancel tests dialog box.

VIEWING/PRINTING RESULT REPORTS

1. From the Results menu, select **Reports**.
2. Use the Search Criteria tab to search for the order.
Note: There are several filtering options.
3. Click **Search**.
4. Select the report to view or print.
5. Click the **Report** link to perform your default report action.

COPYING AND PASTING FROM REPORT

1. On the Adobe toolbar, click the Adobe icon. (A)
2. Click the attachments icon. (📎)
3. Right-click the Plain Text Report file and select **Open Attachment**. The file opens in the application assigned to open text files on your computer, such as Notepad.
4. To select a portion of text, right-click and select **Select All**, or manually select the text that you want to copy.
5. Right-click and select **Copy**.
6. Right-click and select **Paste** to paste the copied data into your application or system.
Note: You might need to change the format of the text so that it displays properly after you paste it into your application or system. For example, you can set the font to Courier New.

TEST ADD-ON

Test Add-Ons can only be performed on orders with the status of **Sent to Lab**. Orders with the status of **Final** or **Cancelled** will not allow Test Add-Ons.

Manual Add-On Order

1. From the Orders menu, select **Order Search**.
2. Use the Search Criteria tab to search for the order.
Note: There are several filtering options.
3. Click **Search**.
4. Select the order to add on.
5. Click the **Edit Order** link.
6. Click **Continue** to access the Tests tab.
7. In the **Keyword** field, enter the Test ID or a keyword.
8. Press **Enter** to search for your keyword. A drop-down list appears when the search is complete.
9. Select the test to order from the list. The test is added to the list of tests for this order.
10. Repeat steps 7-9 to add more tests to the order. If no more tests are required, continue to Step 11.
11. When test selection is complete, click **Continue**.
Notes:
 - The Questions tab opens automatically when additional information is required. Enter the requested information. Click **Continue** to save the order. The order will automatically be queued for batching.
 - At completion of the order, the user will receive a message stating the order was successfully submitted and the order accession number appears. Click **OK** to return to the **New Order** window.
12. From the Orders menu, select **Batch Processing**.
13. In the Batch column, select the checkbox of the order(s) you want to close.
Note: The PB icon (PB) denotes the order has been previously batched.
14. Click **Close Batch Set**.

Integrated (Interface Order) Order Add-On

1. Add the test on to the order from your LIS.
2. Transmit the order from LIS.
3. Select **Batch Processing** from the Orders menu.
4. In the Batch column, select the checkbox of the order(s) you want to close.
Note: The PB icon (PB) denotes the order has been previously batched.
5. Click **Close Batch Set**.