



# TEXAS DEPARTMENT OF STATE HEALTH SERVICES

P.O. Box 149347 • Austin, Texas 78714-9347 • 1-888-963-7111

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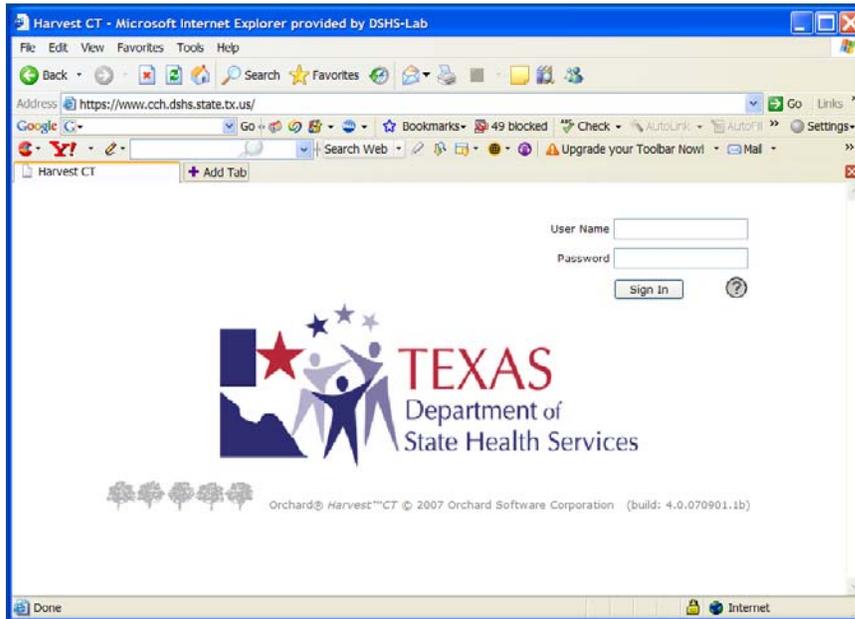
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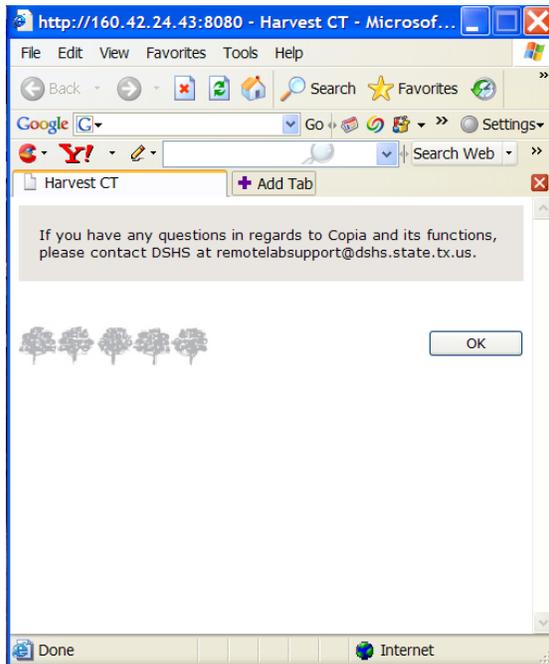
## I. General User Account Information:

1. Access the Internet and type in the following URL address to access Texas DSHS Austin Lab/South Texas Copia: <https://www.cch.dshs.state.tx.us>

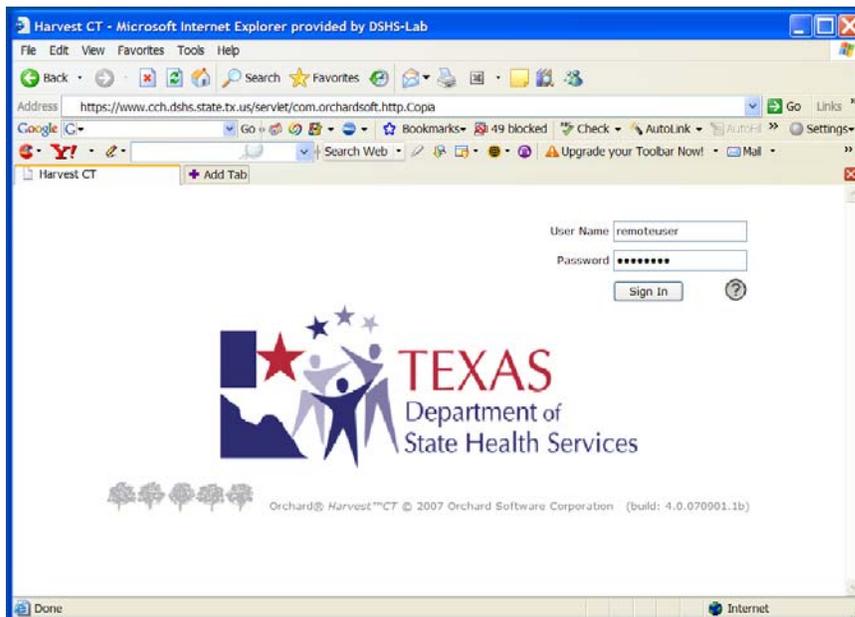


2. Before signing into Copia, please verify that this computer has access to a printer and the most current Adobe Reader software is currently installed on your workstation. If Adobe Reader is not installed or if unsure, please install or have the appropriate IT staff install the latest version of Adobe Reader by visiting <http://get.adobe.com/reader/>.

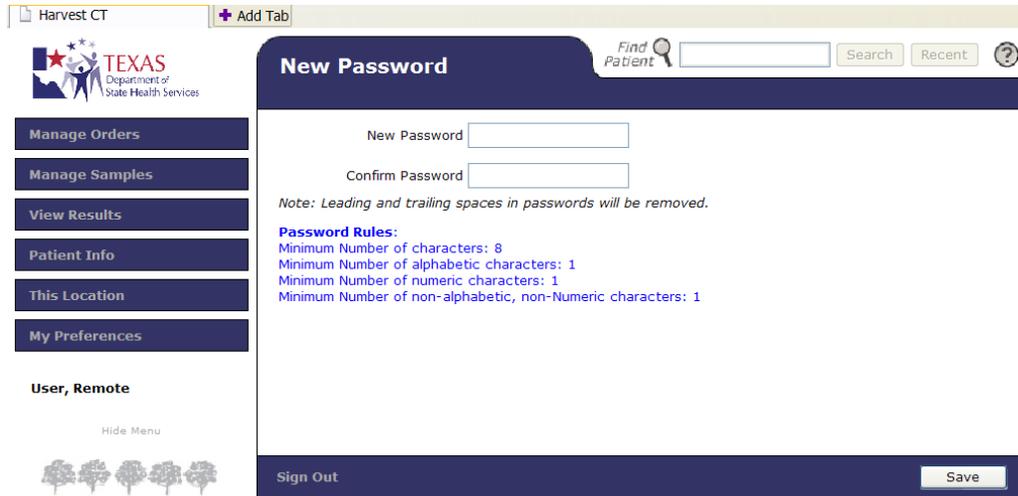
3. The Copia Administrator can be accessed by clicking on the ? icon.



4. Enter the User Name and Password provided by the Copia Administrator and click the "Sign In" tab.



5. A prompt will be displayed requiring the temporary password assigned by the Copia Administrator to be changed. Please follow the Password rules so that the new password will be successfully saved. Then click the “Save” tab.



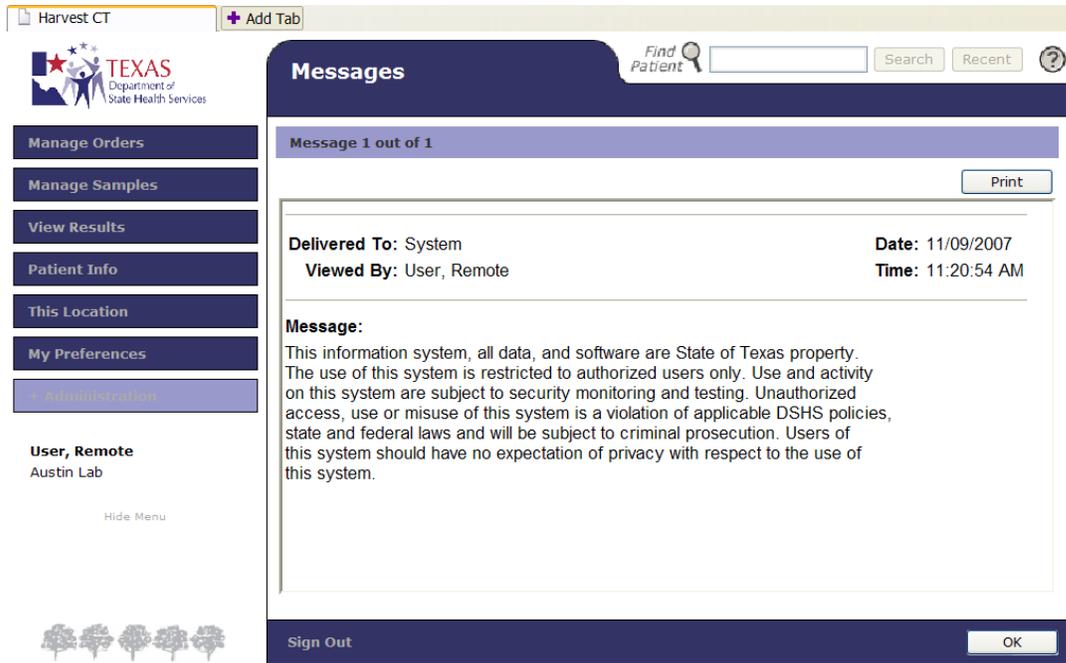
The screenshot shows a web browser window with a tab titled "Harvest CT". The page header includes the Texas Department of State Health Services logo and a "Find Patient" search bar. A left-hand navigation menu contains buttons for "Manage Orders", "Manage Samples", "View Results", "Patient Info", "This Location", and "My Preferences". Below the menu is a "User, Remote" section with a "Hide Menu" link and five tree icons. The main content area is titled "New Password" and features two input fields for "New Password" and "Confirm Password". A note states: "Note: Leading and trailing spaces in passwords will be removed." Below the fields are "Password Rules":  
Minimum Number of characters: 8  
Minimum Number of alphabetic characters: 1  
Minimum Number of numeric characters: 1  
Minimum Number of non-alphabetic, non-Numeric characters: 1  
At the bottom of the form are "Sign Out" and "Save" buttons.

6. Select the location in which the lab orders will be entered and saved. Then click the “OK” tab.



The screenshot shows the same web browser window as above, but the main content area is titled "Set Location". It prompts the user to "Please choose your location:" and displays a list box with "Austin Lab - Austin Lab" selected. Below the list box is an unchecked checkbox labeled "Always Use Selected Location" and a dropdown menu for "Label Printer Type" currently set to "EPL2". At the bottom of the form are "Sign Out", "OK", and "Cancel" buttons.

7. A notification message will be displayed after each initial log into Copia. Please read the message and click “OK”.



The screenshot shows a web application interface with a dark blue header and a light blue sidebar. The main content area displays a notification message. The sidebar contains a navigation menu with items: Manage Orders, Manage Samples, View Results, Patient Info, This Location, My Preferences, and Administration. Below the menu, the user's name 'User, Remote' and location 'Austin Lab' are displayed, along with a 'Hide Menu' link. At the bottom of the sidebar are five tree icons. The main content area has a 'Messages' header with a search bar and 'Search' and 'Recent' buttons. Below this, it shows 'Message 1 out of 1' with a 'Print' button. The message content includes 'Delivered To: System', 'Viewed By: User, Remote', 'Date: 11/09/2007', and 'Time: 11:20:54 AM'. The message body contains a disclaimer about system usage. At the bottom of the main content area, there is a 'Sign Out' button and an 'OK' button.

Harvest CT + Add Tab

Find Patient  Search Recent ?

Messages

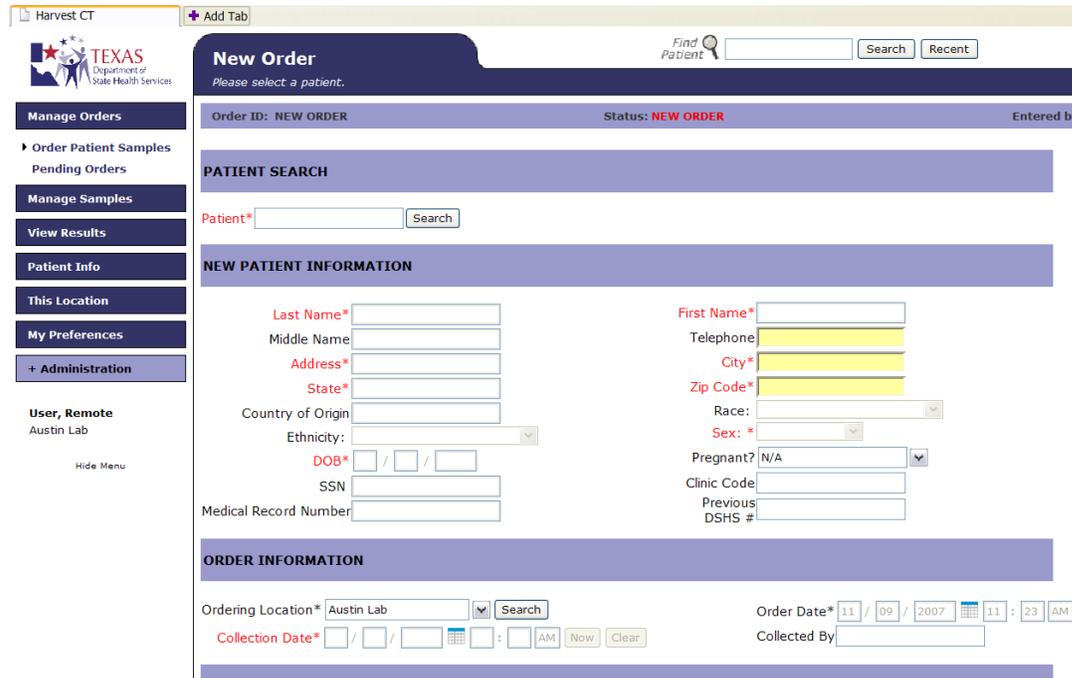
Message 1 out of 1 Print

**Delivered To:** System **Date:** 11/09/2007  
**Viewed By:** User, Remote **Time:** 11:20:54 AM

**Message:**  
This information system, all data, and software are State of Texas property. The use of this system is restricted to authorized users only. Use and activity on this system are subject to security monitoring and testing. Unauthorized access, use or misuse of this system is a violation of applicable DSHS policies, state and federal laws and will be subject to criminal prosecution. Users of this system should have no expectation of privacy with respect to the use of this system.

Sign Out OK

8. The “New Order” screen is the default screen once successfully logging into Copia.



Harvest CT Add Tab

Find Patient Search Recent

**New Order**  
Please select a patient.

Order ID: NEW ORDER Status: NEW ORDER Entered by

**PATIENT SEARCH**

Patient\* Search

**NEW PATIENT INFORMATION**

Last Name\* Middle Name First Name\* Telephone  
Address\* City\*  
State\* Zip Code\*  
Country of Origin Race:  
Ethnicity: Sex: \*  
DOB\* Pregnant? N/A  
SSN Clinic Code  
Medical Record Number Previous DSHS #

**ORDER INFORMATION**

Ordering Location\* Austin Lab Search Order Date\* 11 / 09 / 2007 11 : 23 AM  
Collection Date\* : AM Now Clear Collected By

9. The following options can be accessed and actively used as a remote user in Copia:

- Manage Orders: Order Patient Samples and Pending Orders
- Manage Samples: Collect Samples, Collection List, Create Manifest and Pending Collection
- View Results: Location Inbox
- Patient Info: Demographics, Insurance and Order History
- This Location: Location Lab Accounts and Set Location
- My Preferences: User, Contact and Application
- Administration: Reports
- Billing Summary, Browser, Completion, Order Exceptions, Orders, Result Delivery, Turnaround Time and Utilization

10. The remote user account is governed following parameters set by DSHS policy:

- The user account will be timed out of Copia after 120 minutes of inactivity
- The user account’s password will expire every 60 days.

## II. Remote Order Entry:

1. To place an order in Copia, access the “New Order” then enter a last name and/or first name in the **Patient\*** field and click “Search” tab.



**New Order**  
Please select a patient.

Order ID: NEW ORDER      Status: NEW ORDER

**PATIENT SEARCH**

Patient\* Patient, Patient      Search

**NEW PATIENT INFORMATION**

Last Name\*      First Name\*  
Middle Name      Telephone  
Address\*      City\*  
State\*      Zip Code\*  
Country of Origin      Race:  
Ethnicity:      Sex: \*  
DOB\*      Pregnant? N/A  
SSN      Clinic Code  
Medical Record Number      Previous:  
DSHS #

**ORDER INFORMATION**

2. A patient search will or will not return depending if the patient exists in Copia.



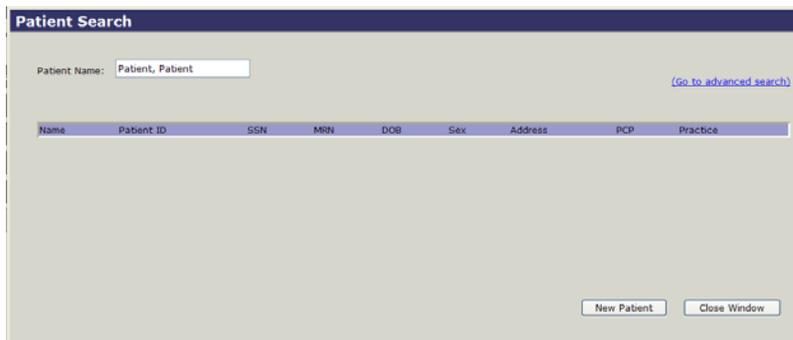
Patient Search

Patient Name: frog      [\(Go to advanced search\)](#)

Name	Patient ID	SSN	MRN	DOB	Sex	Address	PCP	Practice
<a href="#">frog_tormit_r</a>	07-025-000001	111111111		01/25/2005	M	1100 W 49th Street AUSTIN, TX 78756		Austin Lab
<a href="#">frog_sne</a>	62408001		111222333	02/03/1979	F	123 FROGGY CREEK HOUSTON, TX 77079		Austin Lab

New Patient      Close Window

OR



Patient Search

Patient Name: Patient, Patient      [\(Go to advanced search\)](#)

Name	Patient ID	SSN	MRN	DOB	Sex	Address	PCP	Practice
------	------------	-----	-----	-----	-----	---------	-----	----------

New Patient      Close Window

2a. If the patient does exist, click on the patient's name and the patient information will pre-populate the fields.

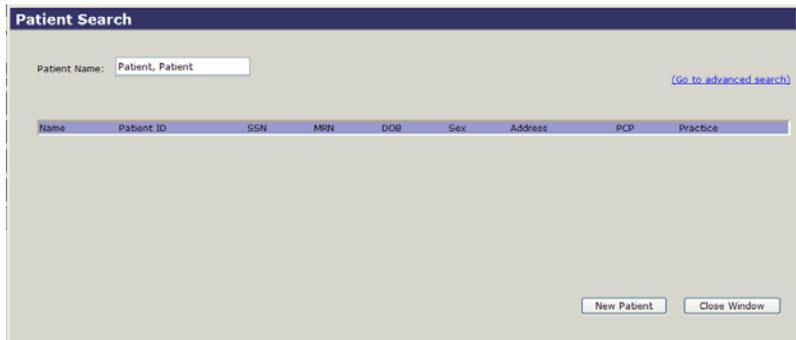


Patient Search

Patient Name:  [\(Go to advanced search\)](#)

Name	Patient ID	SSN	MRN	DOB	Sex	Address	PCP	Practice
<a href="#">frog_kermit_r.</a>	07-025-000001	111111111		01/25/2005	M	1100 W 40th Street AUSTIN, TX 78756		Austin Lab
<a href="#">frog_sue</a>	62408001		111222333	02/03/1970	F	123 FROGGY CREEK HOUSTON, TX 77079		Austin Lab

2b. If the patient does not exist, click on the “New Patient” tab and the **Patient\*** field will pre-populate with -New Patient-.

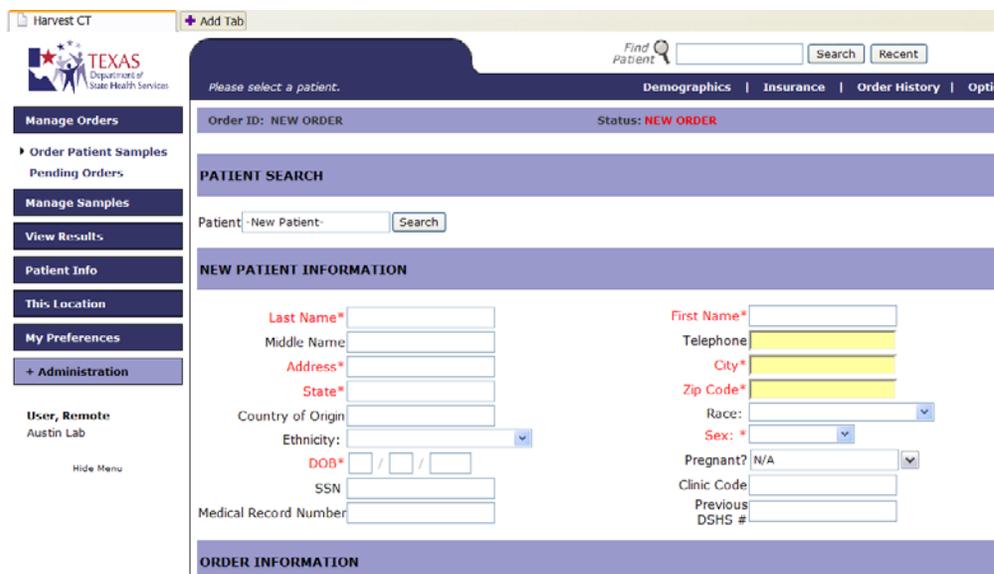


Patient Search

Patient Name:  [\(Go to advanced search\)](#)

Name	Patient ID	SSN	MRN	DOB	Sex	Address	PCP	Practice
------	------------	-----	-----	-----	-----	---------	-----	----------

then



Harvest CT

Please select a patient. [Demographics](#) | [Insurance](#) | [Order History](#) | [Opti](#)

Order ID: NEW ORDER Status: **NEW ORDER**

**PATIENT SEARCH**

Patient:

**NEW PATIENT INFORMATION**

Last Name\*  First Name\*

Middle Name  Telephone

Address\*  City\*

State\*  Zip Code\*

Country of Origin  Race:

Ethnicity:  Sex: \*

DOB\*  /  /  Pregnant?

SSN  Clinic Code

Medical Record Number  Previous DSHS #

**ORDER INFORMATION**

3. The required fields are in **red\*** and must be entered before certain fields can be filled or the order saved.



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## Pre-existing patient:

**PATIENT SEARCH**

Patient

**NEW PATIENT INFORMATION**

Last Name* <input type="text" value="Frog"/>	First Name* <input type="text" value="Kemit"/>
Middle Name <input type="text" value="R"/>	Telephone <input type="text" value="458-7111"/>
Address* <input type="text" value="1100 W 49th Street"/>	City* <input type="text" value="AUSTIN"/>
State* <input type="text" value="TX"/>	Zip Code* <input type="text" value="78756"/>
Country of Origin <input type="text"/>	Race: <input type="text" value="Other"/>
Ethnicity: <input type="text" value="Non-Hispanic"/>	Sex: <input type="text" value="Male"/>
DOB* <input type="text" value="01"/> / <input type="text" value="25"/> / <input type="text" value="2005"/>	Pregnant? <input type="text" value="N/A"/>
SSN <input type="text" value="111111111"/>	Clinic Code <input type="text"/>
Medical Record Number <input type="text"/>	Previous DSHS # <input type="text"/>

**ORDER INFORMATION**

Ordering Location\*        Order Date\*  /  /   :  AM

Collection Date\*  /  /   :  AM        Collected By

**PHYSICIAN INFORMATION**

Ordering Provider\*

**PAYOR SOURCE**

Payor Source\*

M'Caid/M'Care#

Insurance / Self Pay

**ORDER CHOICES**

Order Choice Search

Order Choice	Sample ID	Cancel
<i>Please select a patient.</i>		

**DOCUMENTATION AND ACTIONS**

Sign Out



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## New Patient Entry:

**NEW PATIENT INFORMATION**

<p>Last Name* <input type="text"/></p> <p>Middle Name <input type="text"/></p> <p>Address* <input type="text"/></p> <p>State* <input type="text"/></p> <p>Country of Origin <input type="text"/></p> <p>Ethnicity: <input type="text" value="v"/></p> <p>DOB* <input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/></p> <p>SSN <input type="text"/></p> <p>Medical Record Number <input type="text"/></p>	<p>First Name* <input type="text"/></p> <p>Telephone <input type="text"/></p> <p>City* <input type="text"/></p> <p>Zip Code* <input type="text"/></p> <p>Race: <input type="text" value="v"/></p> <p>Sex: * <input type="text" value="v"/></p> <p>Pregnant? <input style="border: none; background-color: #eee; padding: 2px;" type="text" value="N/A"/> <input type="text" value="v"/></p> <p>Clinic Code <input type="text"/></p> <p>Previous DSHS # <input type="text"/></p>
---	---

**ORDER INFORMATION**

<p>Ordering Location* <input type="text" value="Austin Lab"/> <input type="text" value="v"/> <input type="button" value="Search"/></p> <p>Collection Date* <input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/> <input type="text" value="v"/> : <input type="text" value=""/> AM <input type="button" value="Now"/> <input type="button" value="Clear"/></p>	<p>Order Date* <input type="text" value="11"/> / <input type="text" value="09"/> / <input type="text" value="2007"/> <input type="text" value="v"/> <input type="text" value="11"/> : <input type="text" value="55"/> AM</p> <p>Collected By <input type="text"/></p>
--	---

**PHYSICIAN INFORMATION**

Ordering Provider\*

**PAYOR SOURCE**

Payor Source\*

M'Caid/M'Care#

Insurance / Self Pay

**ORDER CHOICES**

Order Choice Search   Order Choice Lists  ICD Diagnosis Code

Order Choice	Sample ID	Cancel
<i>Please select a patient.</i>		

**DOCUMENTATION AND ACTIONS**

<input type="button" value="Print Labels"/>	<input type="button" value="Requisition(s)"/>	<input type="button" value="Lab Report"/>	
<input type="button" value="Clinical Info"/>	<input type="button" value="Attachments"/>	<input type="button" value="Cancel Order"/>	<input type="button" value="Collect Samples"/>

4. The Order Information (other than Ordering Location), Physician Information, Payor Source and Order Choices will reset with every new order.

- Certain Payor Sources may require a Medicaid number or Medicare number
- Certain Order Choices are limited to Texas DSHS Austin Lab and Texas DSHS South Texas lab
- All order choices will require an ICD Diagnosis Code before the order can be saved

5. If “1626 – Submitter” is selected as a Payor Source, scroll to the top of the Order Patient screen and select the “Insurance” link. Click on the “Create New Insurance” tab and search for an insurance company. If the insurance company search comes back without “*No Insurance Company found.*” then click the on “New Company and Plan” tab and enter the required fields. Click on the “Update and Select” tab and then click “Save”.

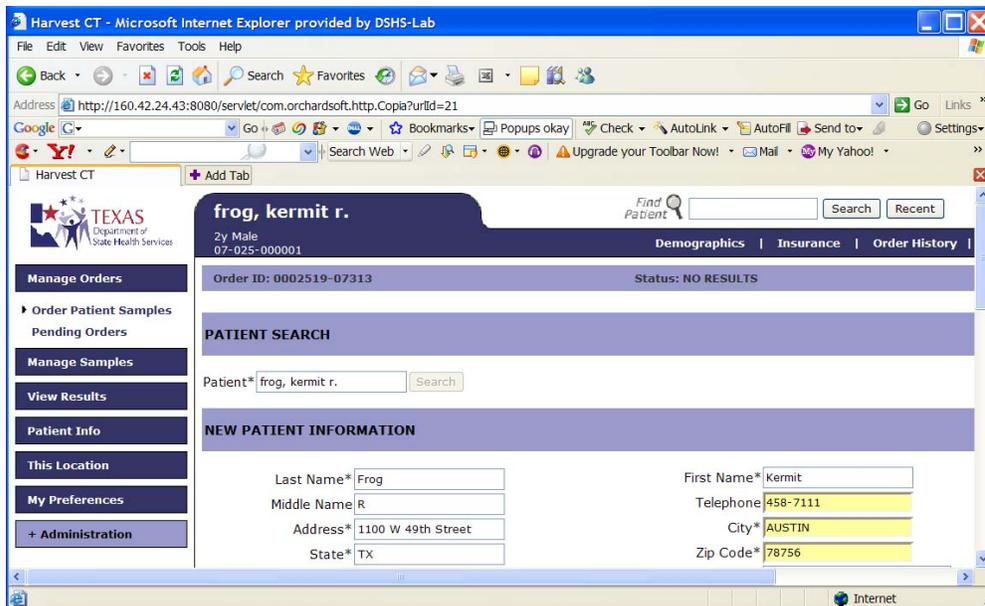
**PAYOR SOURCE**

Payor Source\*

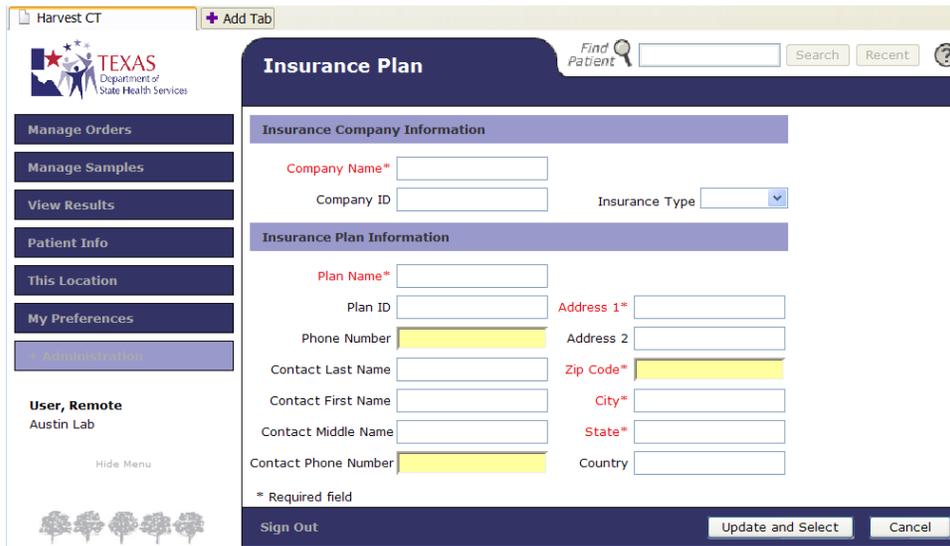
M'Caoid/M'Care#

Insurance / Self Pay

then



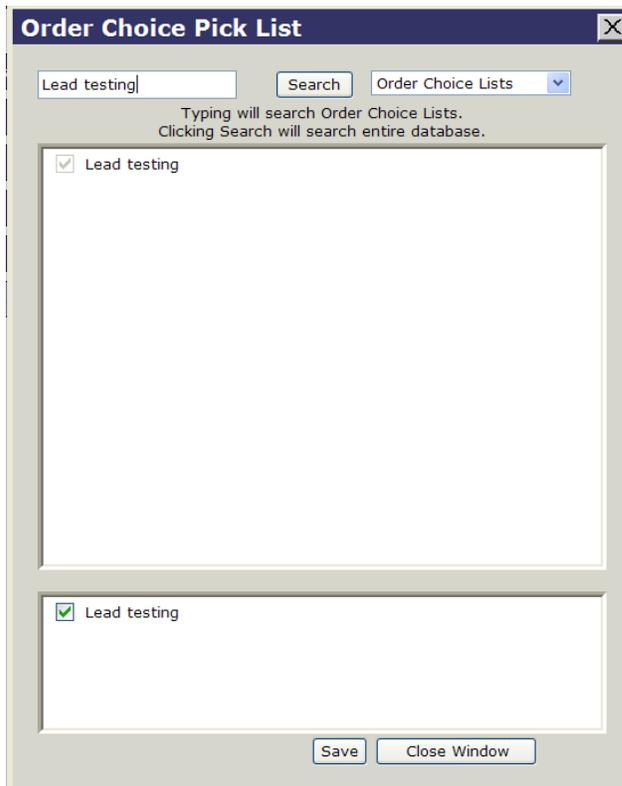
The screenshot shows a web browser window titled "Harvest CT - Microsoft Internet Explorer provided by DSHS-Lab". The address bar shows a URL from orchardsoft.com. The page content includes a patient profile for "frog, kermit r." with demographic information (2y Male, 07-025-000001) and tabs for Demographics, Insurance, and Order History. A "PENDING ORDERS" section shows "Order ID: 0002519-07313" with a status of "NO RESULTS". Below this is a "PATIENT SEARCH" section with a search box containing "frog, kermit r.". The "NEW PATIENT INFORMATION" section contains several form fields: Last Name\* (Frog), First Name\* (Kermit), Middle Name (R), Telephone (458-7111), Address\* (1100 W 49th Street), City\* (AUSTIN), State\* (TX), and Zip Code\* (78756).



6. A lab test will be become available when the lab test is entered into the Order Choice Search. Check the check-off box and click the “Save” tab.



then



7. The cursor will move to the ICD Diagnosis Code that will need to be pre-populated. Once the ICD Diagnosis Code has been entered, click on the “Search” tab or press “Enter”.

**ORDER CHOICES**

Order Choice Search  Order Choice Lists  ICD Diagnosis Code\*

Order Choice	Sample ID	Cancel
<a href="#">Lead testing</a>	T.B.D.	<input type="checkbox"/>

**ORDER CHOICES**

Order Choice Search  Order Choice Lists  ICD Diagnosis Code\*

Selected Code(s) V72.6

Order Choice	Sample ID	Cancel
<a href="#">Lead testing</a>	T.B.D.	<input type="checkbox"/>

8. Once the ICD Diagnosis Code has been entered and all the required fields have been entered, the order can be saved.

9. Depending on the type of lab test, Clinical Information will need to be entered before the order can be completed.

Harvest CT

 Find Patient

**Manage Orders**

**Manage Samples**

**View Results**

**Patient Info**

**This Location**

**My Preferences**

**Administration**

**User, Remote**  
Austin Lab

Hide Menu

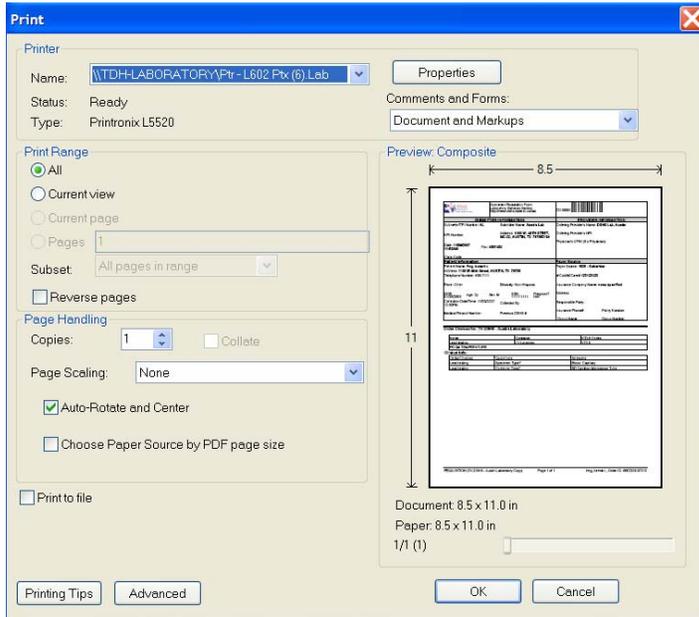


**Clinical Info**

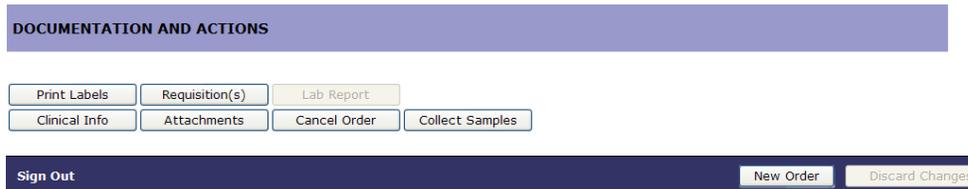
Order Choices	Clinical Info	Response
Lead testing	Specimen Type?* <input type="text"/>	<input type="button" value="v"/>
Lead testing	Container Type? <input type="text"/>	<input type="button" value="v"/>

\* Required field

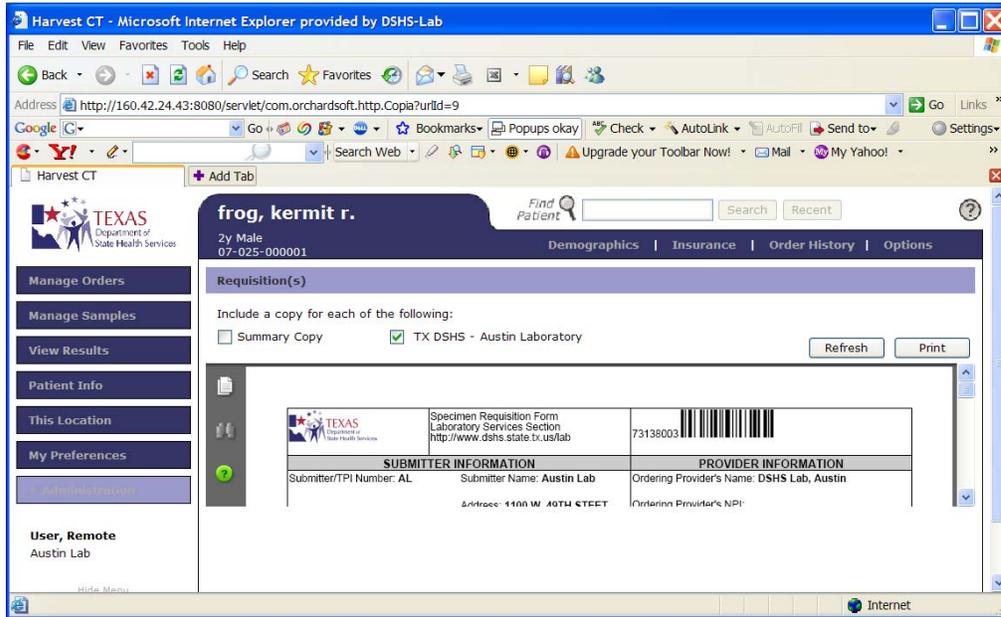
10. Once all the Clinical Information has been entered for the specimen(s), a pop-up screen will display a print preview of the Copia requisition form to be printed. In the event a requisition form does not print, click on the “Requisition(s)” tab under the Documentation and Actions section then click “Print”. Clearly identify the specimen then pack the specimen and the Copia requisition form into the DSHS provided container.



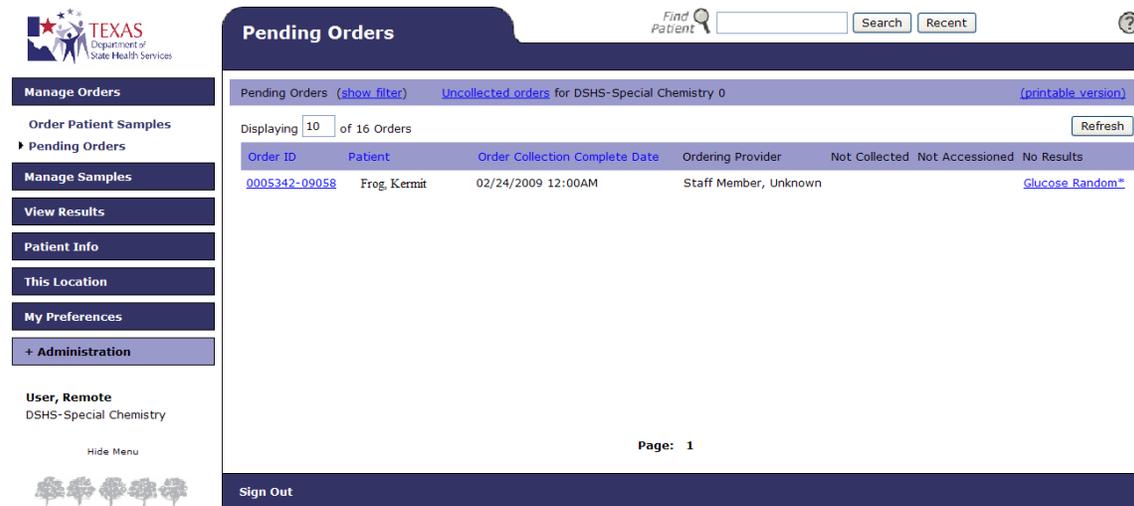
OR



then



11. To check the status of a patient's order, select Manage Orders then click on Pending Orders. The patient's order will remain in this queue until the laboratory test result(s) is sent back to Copia. The patient's order will disappear from the Pending Orders queue with the laboratory report ready for print in the Location Inbox.



### III. Remote Result Reporting:

1. Once tests are released by the laboratory, the lab result reports can be accessed in Copia by clicking on the “View Results” and selecting the “Location Inbox”.



Harvest CT + Add Tab

**frog, kermit r.**  
2y Male  
07-025-000001

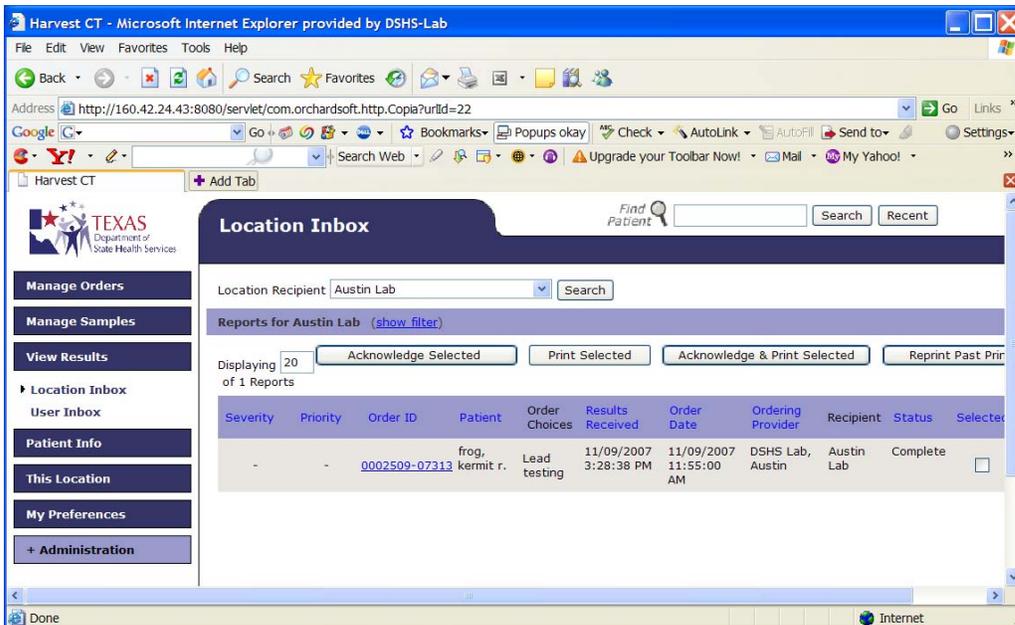
Order ID: 0002519-07313

**PATIENT SEARCH**  
Patient\* frog, kermit r. Search

**NEW PATIENT INFORMATION**  
Last Name\* Frog  
Middle Name R  
Address\* 1100 W 49th Stre

Manage Orders  
Manage Samples  
View Results  
Location Inbox  
User Inbox  
Patient Info  
This Location  
My Preferences  
+ Administration

then



Harvest CT - Microsoft Internet Explorer provided by DSHS-Lab

Address http://160.42.24.43:8080/servlet/com.orchardsoft.http.Copia?urlId=22

**Location Inbox** Find Patient Search Recent

Location Recipient Austin Lab Search

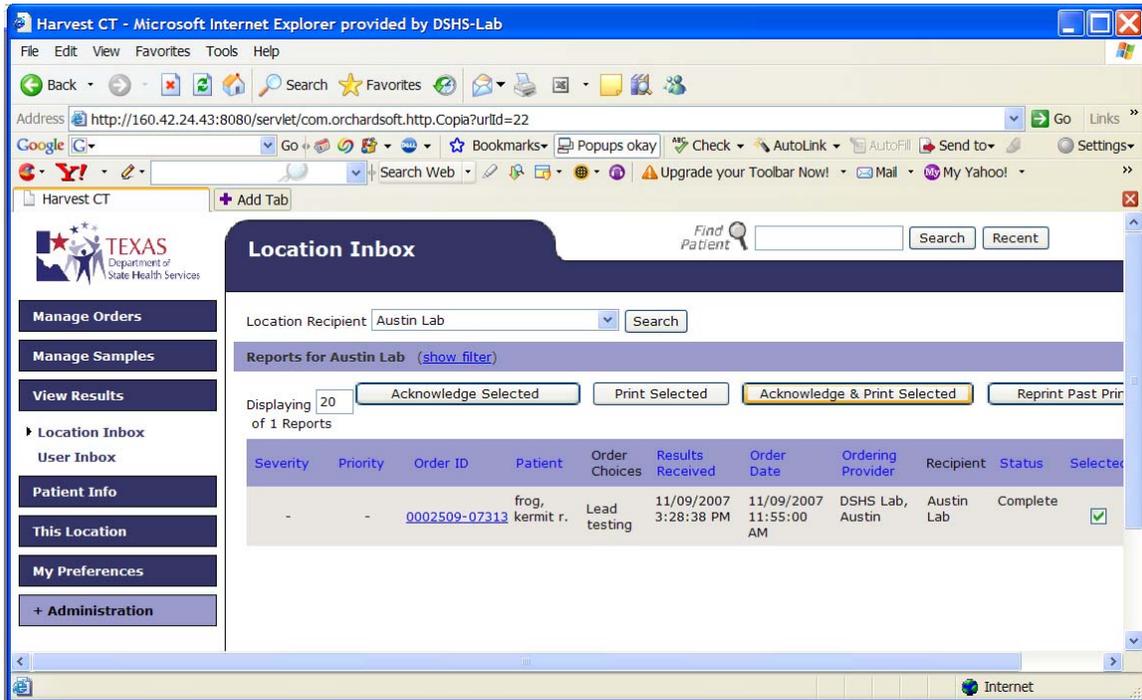
Reports for Austin Lab (show filter)

Displaying 20 Acknowledge Selected Print Selected Acknowledge & Print Selected Reprint Past Pri  
of 1 Reports

Severity	Priority	Order ID	Patient	Order Choices	Results Received	Order Date	Ordering Provider	Recipient	Status	Select
-	-	0002509-07313	frog, kermit r.	Lead testing	11/09/2007 3:28:38 PM	11/09/2007 11:55:00 AM	DSHS Lab, Austin	Austin Lab	Complete	<input type="checkbox"/>

Done Internet

2. Check the “Selected” option box and click on “Acknowledge & Print Select” tab so that the report can be finalized and printed. If the report is not needed to be printed off, just click on the “Acknowledge Selected”. The “Location Inbox” queue will clear after this report has been “Acknowledge & Print Select” and/or “Acknowledged”.



Harvest CT - Microsoft Internet Explorer provided by DSHS-Lab

Address: http://160.42.24.43:8080/servlet/com.orchardsoft.http.Copia?urlId=22

Location Recipient: Austin Lab

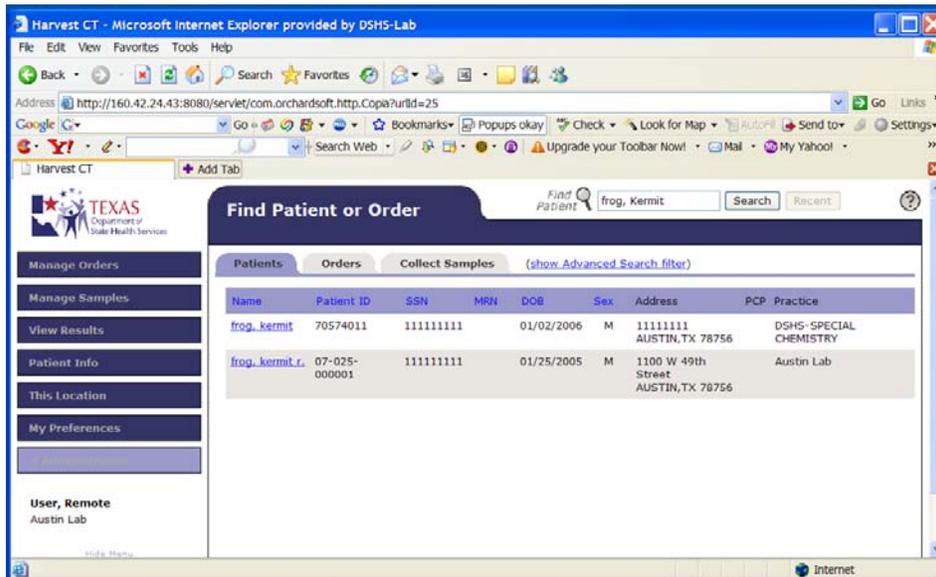
Reports for Austin Lab (show filter)

Displaying 20 of 1 Reports

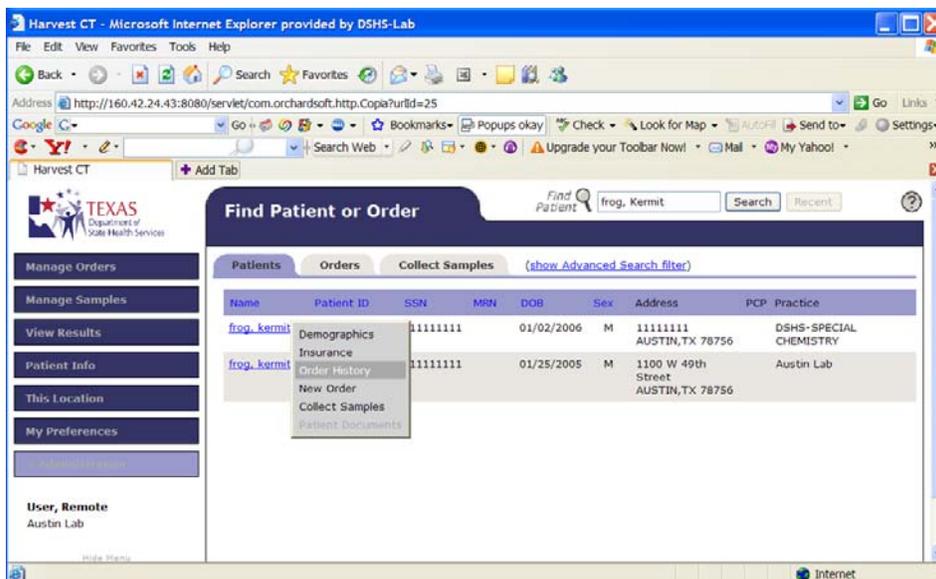
Severity	Priority	Order ID	Patient	Order Choices	Results Received	Order Date	Ordering Provider	Recipient	Status	Selected
-	-	<a href="#">0002509-07313</a>	frog, kermit r.	Lead testing	11/09/2007 3:28:38 PM	11/09/2007 11:55:00 AM	DSHS Lab, Austin	Austin Lab	Complete	<input checked="" type="checkbox"/>

3. In the event the lab report is not “Acknowledged”, the original report will always be updated in the event a result is amended. By acknowledging the report, an amended result on a patient will create a second report.

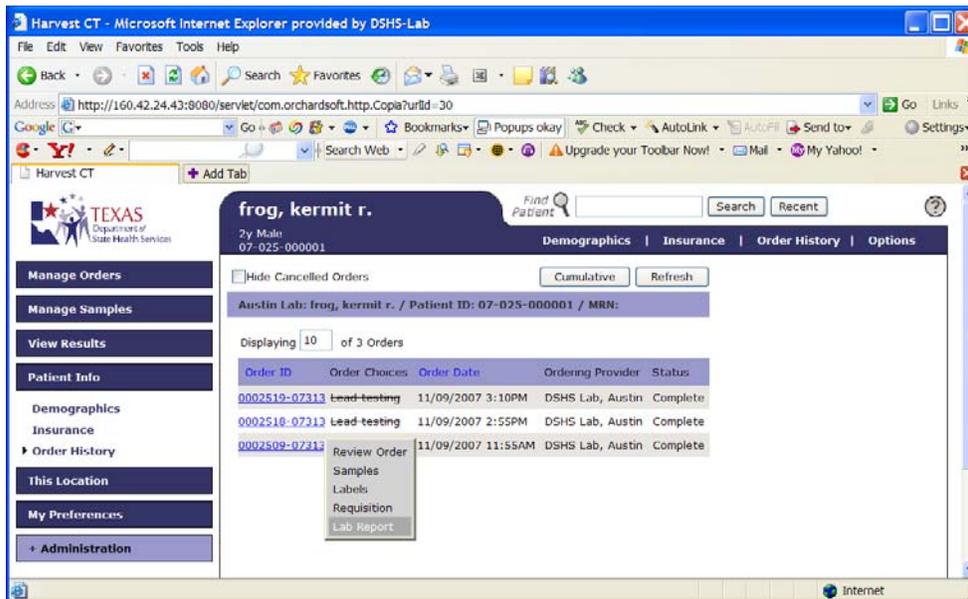
4. To query on past patients created in Copia, just enter the patient’s last name, first name and click on “Search”. Once the patient has been identified, click on the patient’s name and select “Order History”. Click on the “Order ID” containing the test that needs to be reprinted and select the “Lab Report” option. The lab report will pop-up and reprinted by selecting the “Print” tab.



then



then



5. Once finished in Copia, click on the “Sign Out” option at the bottom and close the Internet browser.

