Fondation Mérieux

LabBook v3.6

# Secretary manual

V2

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Fondation **Mérieux**
Lutte contre les maladies infectieuses depuis 1967
www.fondation-merieux.org

# Table of contents

Foreword ..... 2
Home page ..... 2
Creating a new file ..... 2
Daily billing status ..... 7
Folder list ..... 7
Reports ..... 8
Quality ..... 10
Non-conformities ..... 11
Minutes ..... 12
Document case ..... 12
Barcode ..... 13
Quality and Non-Compliance Module ..... 13
Advanced secretary ..... 13
APPENDIX: Corresponding ID labels- Data export ..... 15

# Foreword

This manual presents the LabBook elements accessible to a person with "secretary" rights. If you do not have access to any of the actions via your interface, please contact your administrator so that these rights can be assigned to you.

# Home page

By clicking on the icon next to your name, you can log out and edit your personal information and password.

The Select item above your name icon lets you change the language of your application's graphical interface.

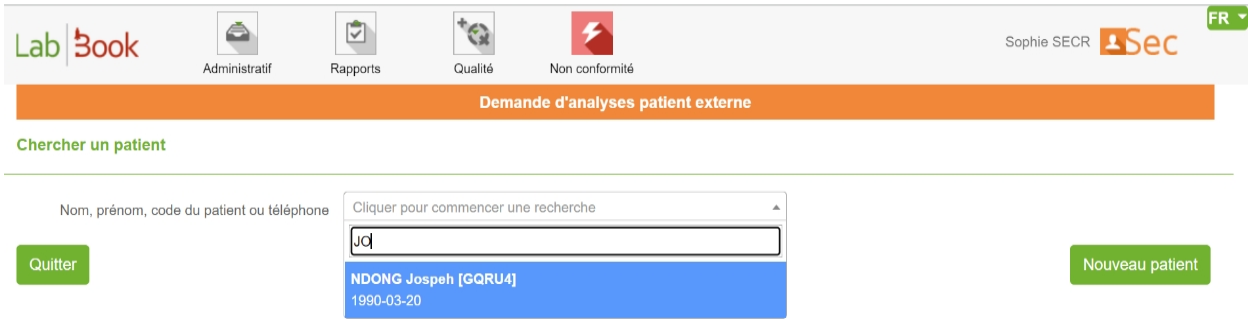
This home page also gives you direct access to the registration of new patient files. To do this, you can either use the icons on this home page, or go to the "Administration" menu.

# Creating a new file

## External patient

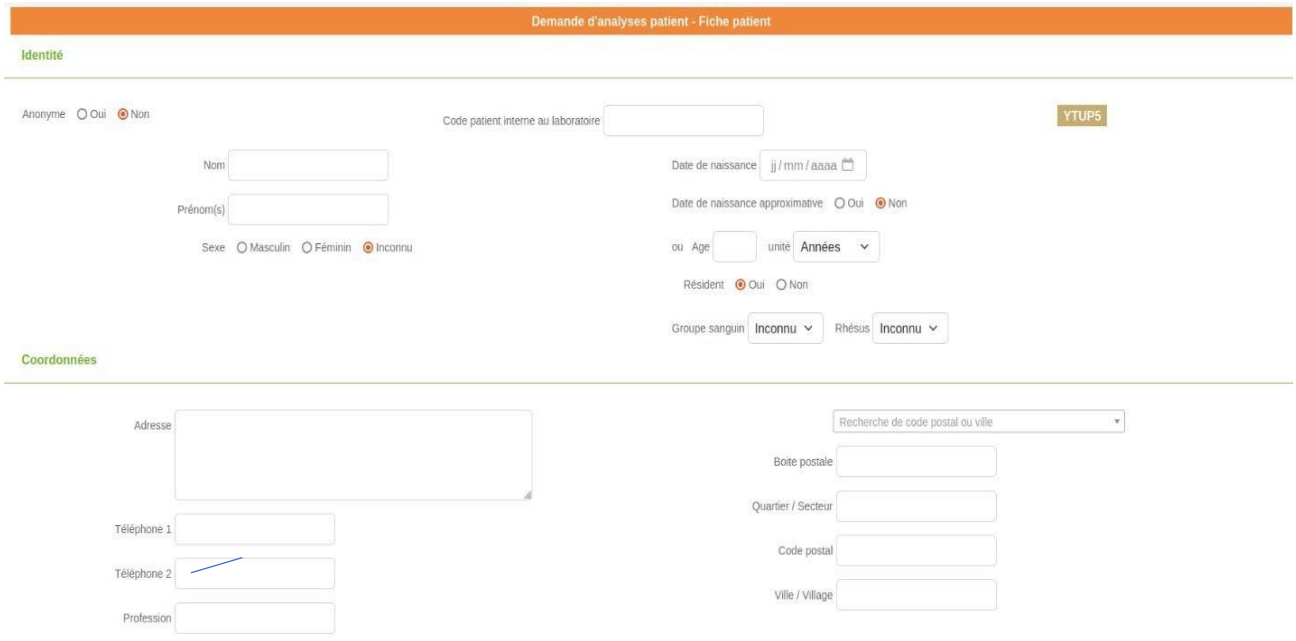
Click on "New external request". This interface enables you to create a file for an external patient, i.e. a non-hospitalized patient.

The first step is to search for the patient. This step is important because it links the analysis request to the patient code already created in the database. If the patient has a card with a patient number, don't hesitate to use this rather than searching by surname, first name or telephone number.

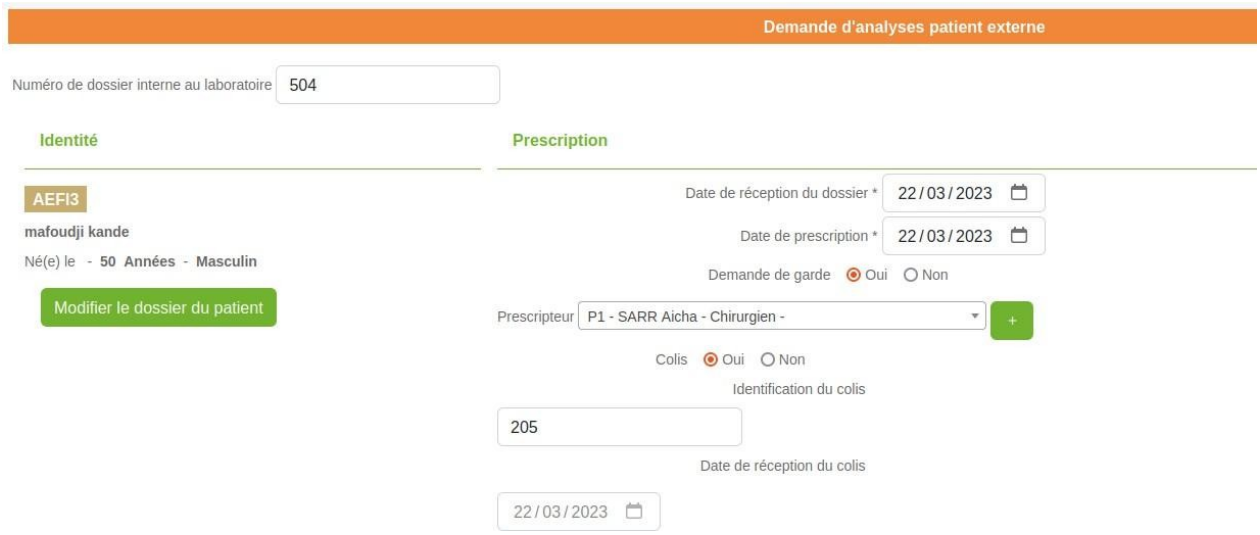



**Patient exists and matches:** Click on the name displayed below the search engine to select your patient.

**Patient does not exist or does not match:** Click on "New patient" to create the patient.




**Filling in the file (analysis request) :** Once the patient has been registered, you will be taken to an interface where you can enter the various tests requested for the file.




In the "Internal laboratory file number" field, you can enter the file number corresponding to the request number in the laboratory register.

The left-hand side shows the patient's identity, which can be modified by clicking on the "Modify patient file" button.
This can be modified by clicking on the "Modify patient file" button.

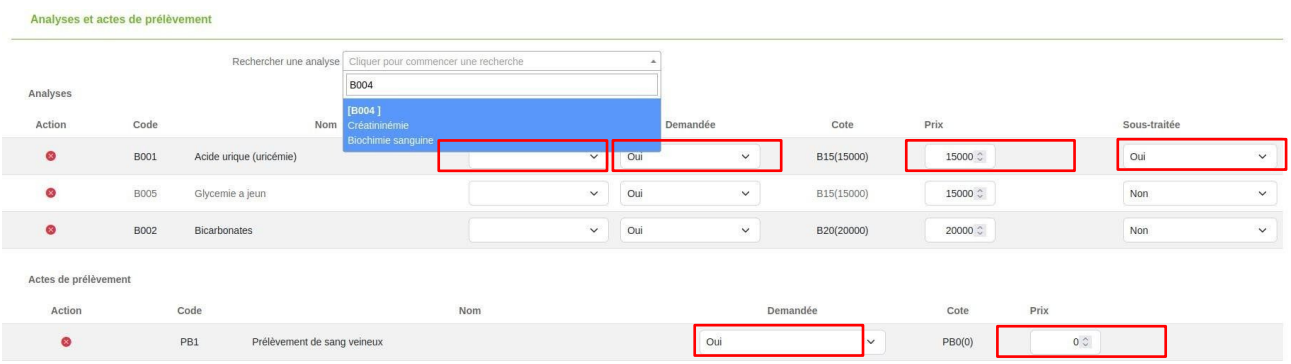
The right-hand side concerns the prescription itself.

By default, the date of receipt of the file is the current date. You can, of course, modify this date. The prescription date is mandatory. If the request is made at an on-call time, select Yes to the "On-call request" option.

If the prescriber already exists in the database, you can select him/her by entering either his/her code or part of his/her first or last name. Otherwise, click on the plus icon to open a new tab. Add your prescriber and click on Save. Return to the

In the "External patient test request" section, enter part of the prescriber's identity you have just added to select him/her.

Once these elements have been filled in, you can select the requested analyses. To do this, either go by the analysis name, or by its code:



You can modify the elements framed in red to indicate urgency criteria and price. You can also indicate subcontracted analyses by selecting Yes in the "Subcontracted" column.

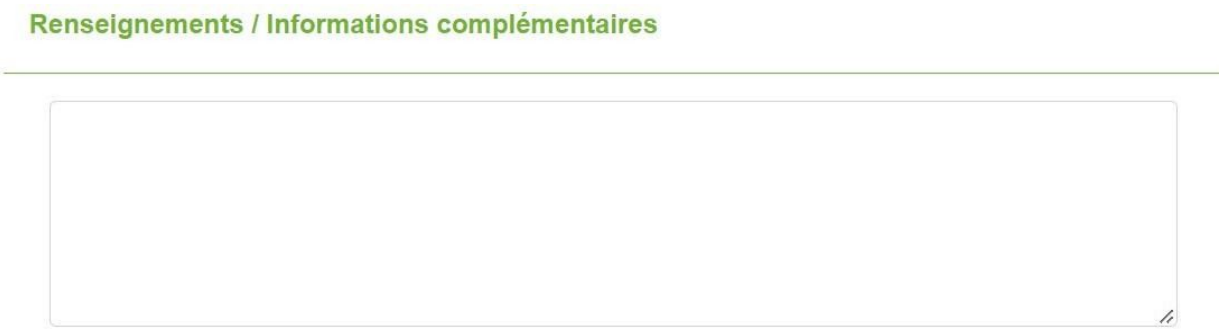
**Billing**

The billing interface is located below these elements. This function can be disabled by the administrator from the administration interface. Here, you can specify elements relating to invoice reduction and patient management. You can also enter a receipt number if required.

Grayed-out items are calculated directly by the software on the basis of the items entered.

**Pathological products:** If the patient comes with samples already taken, you can use the interface to indicate them. In the case of samples taken on site, technicians can enter the details of the sample.

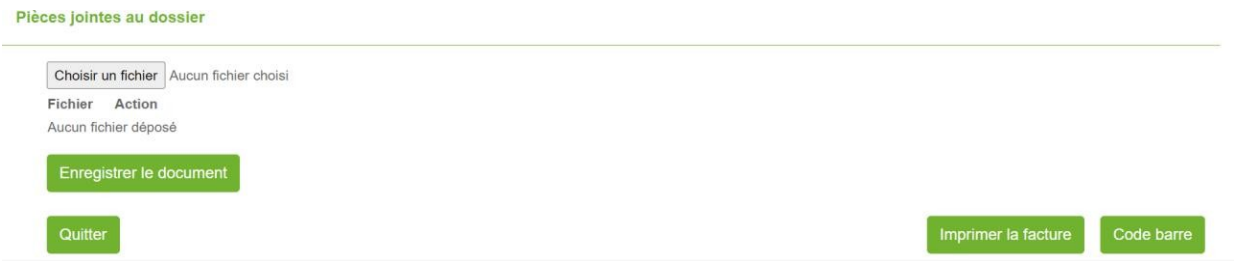
**Comments:** Here you can enter any information you feel is important for your laboratory's processing of the file.




**Note**: If the laboratory uses LabBook Connect, the sampling code associated with the analysis must correspond to the file identifier generated by the automated system.

**Saving the file:** When you are satisfied with the results, click on "Save". You will be asked to confirm the creation and validation of this file. You can either remain on the page by clicking on "Cancel", or validate your entry by clicking on "Validate
".

Once validated, you can attach documents to the patient file, print the invoice or barcode labels generated from the patient file number, or exit the file to move on to a new record.



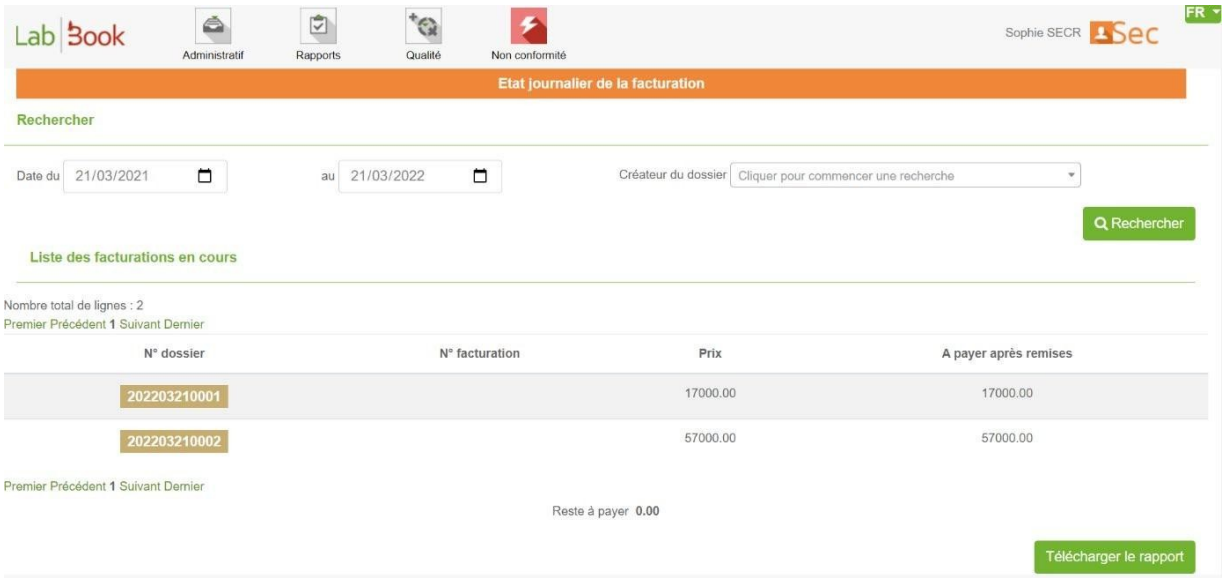

## Hospitalized patient

The analysis request for an inpatient is very similar to that for an outpatient. The difference is in the part where the prescription is indicated. In fact, information on the patient's place of hospitalization is added here, so that the information can be transmitted to the requesting department.

As the patient is hospitalized, billing is reduced to zero, as these procedures will normally be billed to the patient's hospital stay. If this is not the case for you, please refer to the chapter on preferences to see how to change this setting.

# Daily billing status

Via the "Report" menu, "Daily billing status", you can access the status of your outstanding invoices. Day by day, you can view/print the outstanding balance.

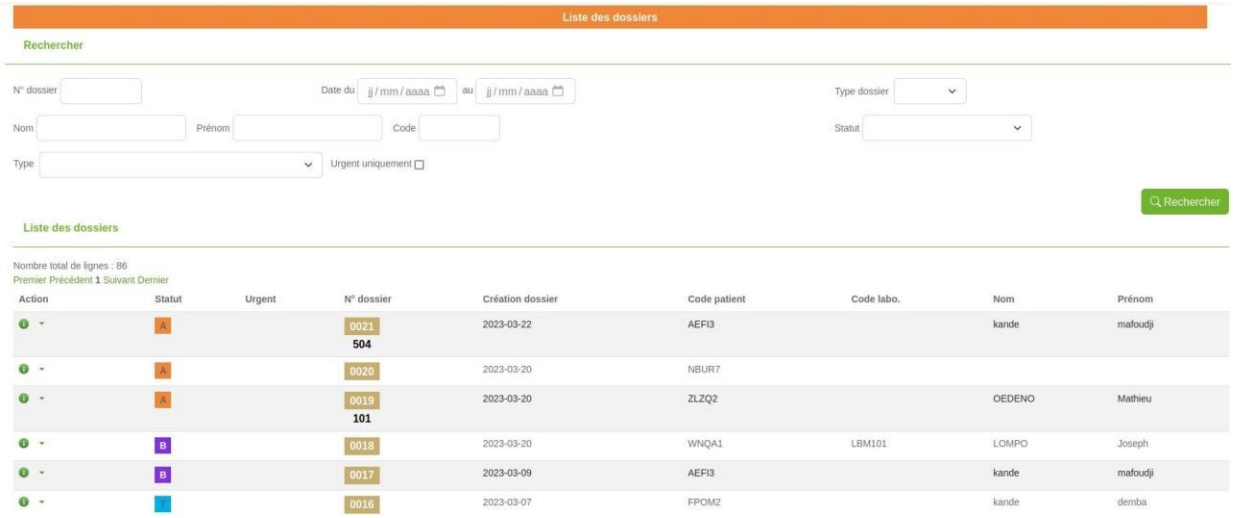



You can change the date filter and restrict the view by file creator.

The outstanding balance is displayed at the bottom of the list.

# File list

You can access this list either via the icon on the home page, or via the "Administration" menu, "Folder list".




This display gives you a quick overview of current dossiers. The different statuses are as follows:

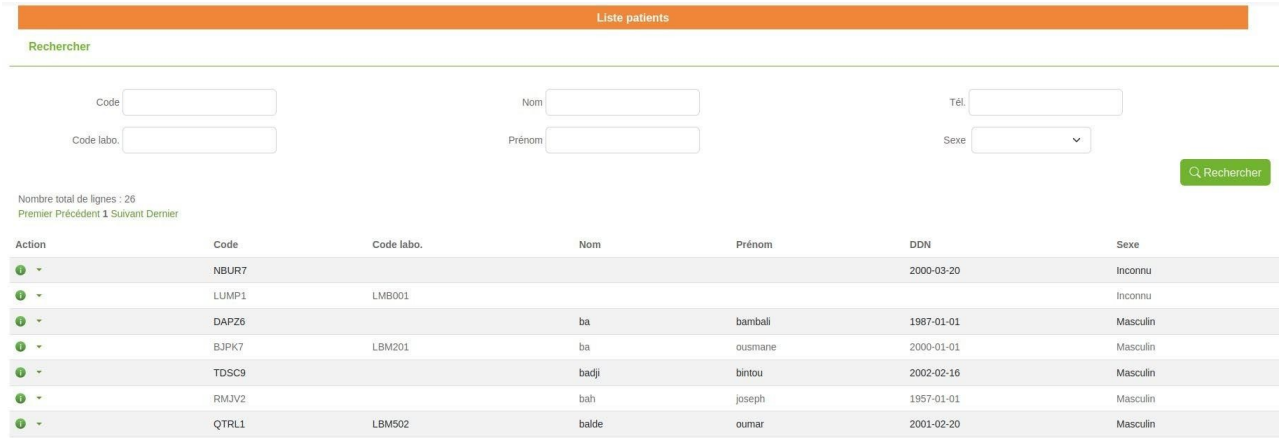
- A: administratively validated (no analysis results have been entered in the file)
- T: technically validated (results have been entered and validated by the technician. The biologist must validate them to create the report).
- B: biologically validated (results have been validated. The report can be edited. Click on the file to see when).
- I: some elements have been validated, but not all the requested analyses.

# Reports

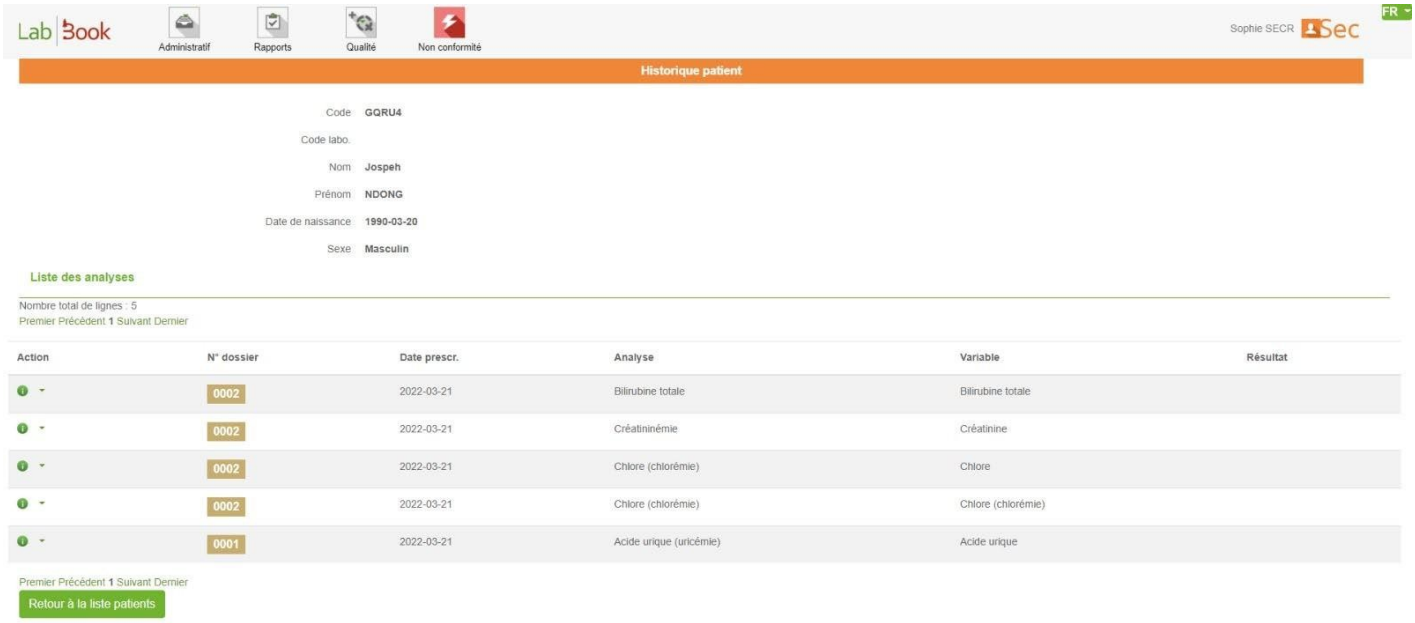
You have access to the LabBook standard reports tool.

## Patient history

This report lets you search for a patient and access his or her history in the software.




You can search for the patient concerned by code or directly by surname/first name. To access the patient's history, simply click on the pencil icon in the History column. You will then be taken to a page showing all the analyses performed on the patient and the known results.




## End-of-day report

By default, this report shows the status of the various files in progress for the current day.

You can change the date filter to select a different day or period. You can also sort your search by "requesting department".

The "Export data" and "Download report" buttons allow you to obtain the report in csv and PDF format.

# Quality

Via the "Quality" menu, you can set up a quality management system. A range of functions are grouped together under this menu.

## Laboratory

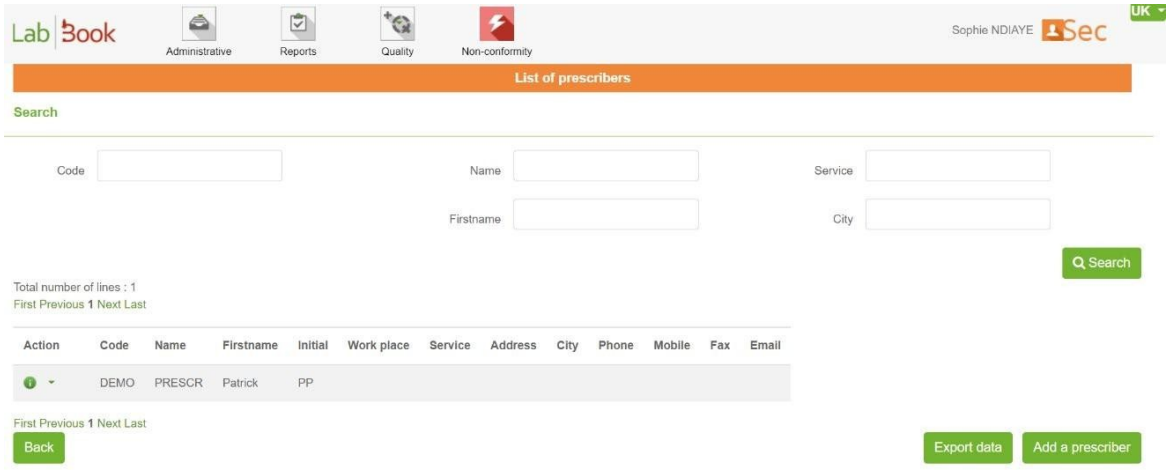
The "Laboratory" tab lets you list all registered sections.

## Staff

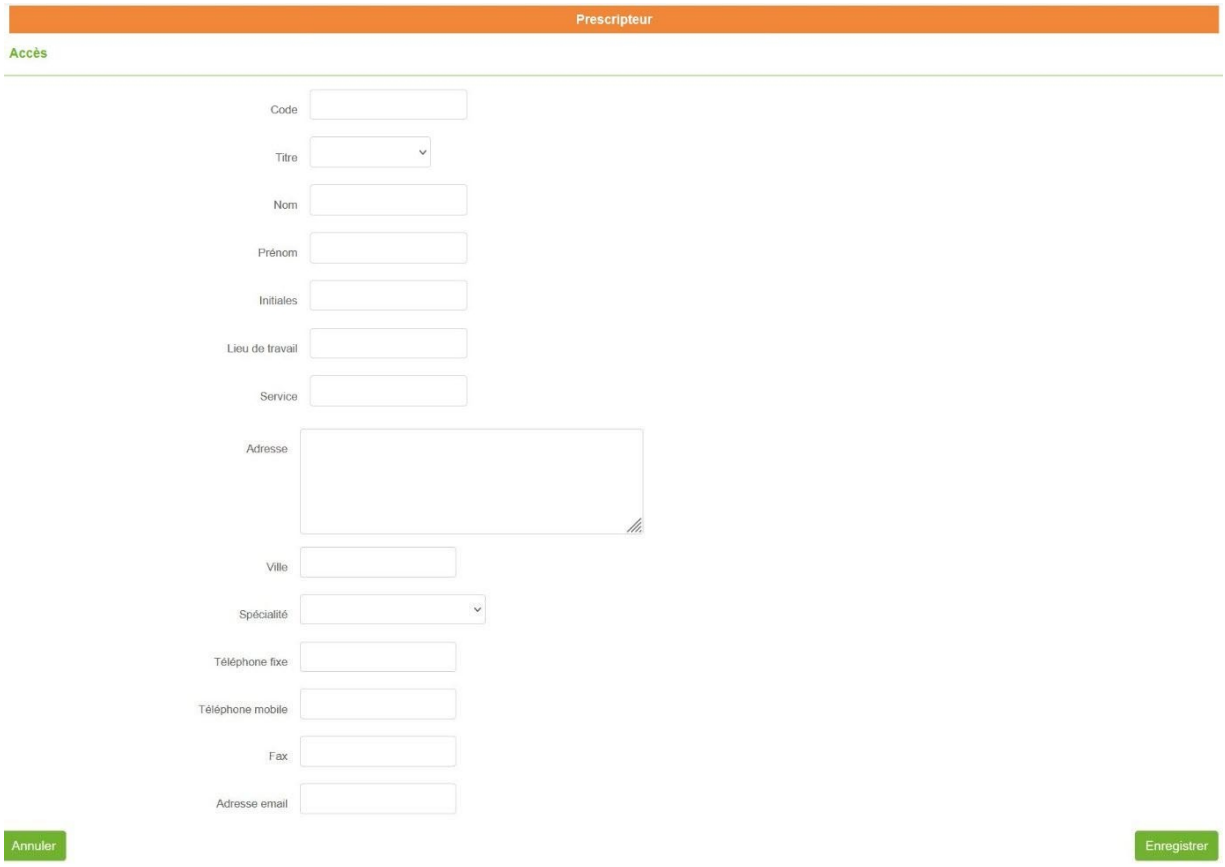
By clicking on "Personnel", you will be redirected to the personnel list page.

## List of prescribers

This list enables you to reference all the prescribers who refer patients to you. Once this has been done, you can select these prescribers when creating a file.



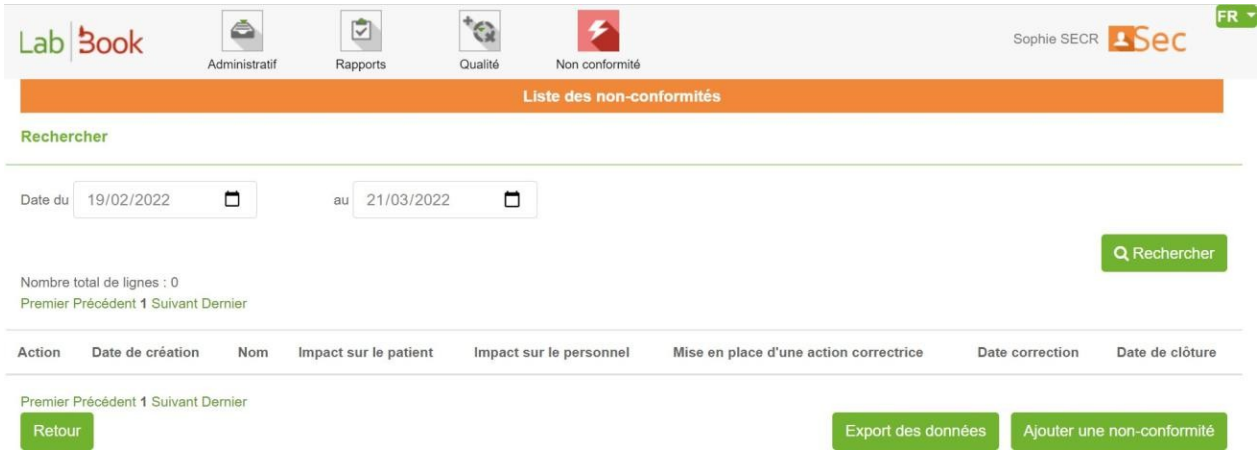

Click on "Add a new prescriber" to add a reference.




# Non-conformities

The non-conformities page lists all registered non-conformities. You can filter the display by selecting a date range. To add a non-conformity, click on

To add a non-conformity, click on "Add a non-conformity". The "Export data" button allows you to export the data in the list.

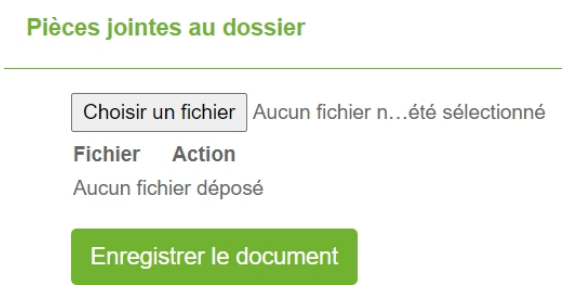



# Reports

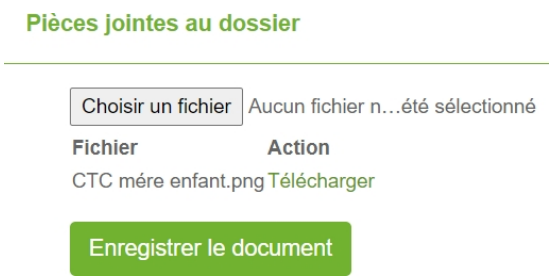
Reports on files validated by the biologist are accessible in the patient's administrative file. After the first download, the duplicate report will be accessible.

# Document folder

In your patient's administrative file, accessible via the file list, you can add scanned documents attached to the file. To do this, you need to save them on your workstation, or at least make them accessible from your workstation. Once this has been done, you can add them to the folder by clicking on "Browse" and then "Save".



Once the files have been uploaded, they appear under their name in the table.




## Bar code

Still in a patient's administrative file, the Barcode function at the bottom of the page prints a barcode with the patient's file number.

## Quality and Non-Compliance Module

By clicking on this icon , authorized personnel can declare a non-conformity.

The form that opens allows you to describe the type of non-conformity, its impact on the laboratory and the steps taken to resolve it.

For further information on these two modules, please refer to the manual on these functions.

## Advanced secretary

This role was added with LabBook 3.0 to give more privileges to a standard secretary account. The difference lies in the ability to access the site settings menu and additional sub-menus under the "Report" menu.

In these menus, the advanced secretary can access the following options: Parameter" menu:

→ "Preferences" menu to customize laboratory information: report headers, unit prices for sampling and analysis procedures, module activation, unit of measurement, etc.

module activation, default age unit, automatic disconnection time, and the possibility of billing hospitalized patients.

→ "User management" to add, modify or delete a user. → "Patient file management" to merge 2 patient files.

Reports" menu: in addition to the options already available with the secretary profile, there are :

→ "Activity report

→ "Epidemiological report→

Statistical report

→ Pivot table"→ "DHIS2 export" "Export WHONET

→ "Export WHONET

# APPENDIX: ID labels - Data export

| ID/Code | Label |
|---|---|
| **Sex** | |
| 1 | Male |
| 2 | Female |
| 3 | Unknown |
| **impact_patient (Impact on patient)** | |
| 1053 | Low |
| 1055 | High |
| 1057 | Serious |
| 0 | None |
| **Impact_user (Impact on employees)** | |
| 1053 | Low |
| 1055 | High |
| 1057 | Serious |
| 0 | None |
| **Title** | |
| 260 | Monsieur |
| 261 | Madam |
| 262 | Miss |
| 263 | Doctor |
| 264 | Professor |
| **Ctq_type_val (Control type)** | |
| QN | Quantitative |
| QL | Qualitative |
| **cte_conform (Inspection result)** | |
| C | Conform |
| N | Not compliant |
| U | Other |

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