

## Lab Services Client Information Worksheet

CSR:

Date:                      Requester Name:                      Contact Number:  
 Physician Owned? Yes No Contract Needed? Yes No Type of Request: New Client New Contract Update

<b>Salesforce Account Name (Doing Business As, DBA)</b>		<b>Legal Name</b>	
<b>Address (include Suite #)</b>		<b>City</b>	<b>State</b> <b>Zip</b>
<b>Business Phone</b>	<b>Business Fax</b>	<b>Specialty</b>	<b>Facility Type</b>

**Operations and IS**      *Lockbox #, location, Cerner # and Cerner Name to filled out by Lab CSR*

<b>Back Line Phone</b>	<b>After Hours Critical Ph.</b>	<b>Critical Ph. Instructions (after hours, dr. cell, etc.)</b>	
<b>Hours of Operations</b>	<b>Building Hours</b>	<b>Courier</b>	<b>Best Pick Up Times (not actual)</b>
		on call routine	
<b>Supplies needed</b>	<b>Requisitions (list)</b>	<b>Lockbox #</b>	<b>Lockbox location</b>
<i>Fill out supply req</i>			
<b>Laboratory Affiliation</b>	<b>EMR Vendor</b>	<b>GLHC Ref?</b>	<b>EMR Affiliate</b>
<b>eShare Lab Orders</b>	<b>Results Delivery</b>	<b>Cerner #</b>	<b>Cerner Name</b>

**Billing**      *Price table, FIN, HealthQuest name, Contract Number to be filled out by Lab CSR*

<b>Tax Exempt</b>	<b>Bill Type</b>	<b>Pricing Table</b>	<b>FIN</b>	<b>HealthQuest Name</b>	<b>Contract Number</b>
	patient client				
<b>Billing Address (if different from business)</b>					<b>Billing Phone</b>

**Contacts**

<b>Office Manager Contact</b>	<b>Office Manager Phone</b>	<b>Office Manager Email</b>	Email lab news
			yes    no
<b>Clinical Supervisor Contact</b>	<b>Clinical Supervisor Ph.</b>	<b>Clinical Supervisor Email</b>	Email lab news
			yes    no
<b>Laboratory Contact</b>	<b>Laboratory Contact Ph.</b>	<b>Laboratory Contact Email</b>	Email lab news
			yes    no
<b>Billing Contact</b>		<b>Billing Contact Phone</b>	<b>Billing Contact Email</b>
<b>Legal Contact</b>		<b>Legal Contact Phone</b>	<b>Legal Contact Email</b>
<b>Provider Name</b>		<b>Specialty</b>	<b>NPI</b>

**Lab CSR: All of this information should also be in Salesforce.**