

	<b>CP 28 Specimen Receipt and Tracking</b>	<b>Department:</b>	Central Processing Lab
		<b>Effective Date:</b>	3/8/2019
		<b>Revised Date:</b>	3/8/2019
		<b>Contact:</b>	Central Processing Lab Section Manager
<b>CLIA Medical Director Signature:</b> 		<b>Approved Date:</b>	

**1. General Procedure Statement:**

**a. Purpose:** To provide laboratory personnel with guidelines for determining specimen acceptability and receipt of specimens into the laboratory information system (LIS)

**b. Responsible Department/Scope:**

- i.** Procedure owner/Implementer: Central Processing
- ii.** Procedure prepared by: Jennifer Hausman
- iii.** Who performs procedure: Central Processing Team Members

**2. Procedure:**

Scanning laboratory specimens into the LIS documents the collection and received dates and times.

**a. Specimen Acceptability Requirements**

- i.** Verify the specimens are appropriately labeled with at least two (2) unique patient identifiers – Patient full name, date of birth, and medical record number
  - 1. Refer to [CP 4 Patient ID and Identification of Blood, Body Fluids, and Tissue Samples](#) procedure
- ii.** Verify specimen integrity
  - 1. Leaking or broken specimen containers should be evaluated for acceptability
    - a. If specimen integrity is compromised, contain specimens inside a sealed biohazard bag and place in the HOLD bin in the Spin Refrigerator
      - i. If sharps, such as broken glass are present, discard specimens in a hard-side sharps container immediately
      - ii. Notify the collecting location of specimen damage and the need for recollection

1. Follow [CP 13 Incident / Credit Reports procedure](#) for documentation of the incident
2. Verify the correct specimen type(s) was received for the ordered test(s)
  - a. If incorrect specimen type received, contact the collection location and request recollection
    - i. Follow [CP 13 Incident / Credit Reports procedure](#) for documentation of the incident
3. Verify sufficient volume for testing
  - a. If insufficient volume, contact the collection location and request recollection
    - i. Follow [CP 13 Incident / Credit Reports procedure](#) for documentation of the incident
4. Verify proper label placement on specimens for the automated lines
  - a. Labels should be legible, right-side up with the arrow pointing to the cap, and smooth without creases to allow placement in the puck

**b. Specimen Processing Priority**

- i. Specimens received in Central Processing are processed on a first in, first out basis according to the following priority:
  1. Code Stroke Specimens
  2. Operating Room (OR) Specimens
  3. Emergency Departments (ED) Specimens – Adult & Pediatric
  4. Comprehensive Cancer Center and Pediatric Hematology/Oncology Specimens
  5. STAT Specimens from all other locations
    - a. Specimens received in a red STAT biohazard bags
    - b. Specimens received on ice
    - c. Body fluid specimens
  6. Routine Specimens
- ii. See [CP 5 Specimen Handling](#) for special handling requirements

**c. Specimen Receiving into the laboratory information system (LIS)**

**i. Specimens NOT on a Packing List / Manifest**

1. Beaker Label – Instrument ready barcode
  - a. Follow [Job Aide CP 28.1 Receiving Specimens in Beaker](#)
2. Labeled without an instrument ready barcode label
  - a. Select “Specimen Inquiry by Patient”
  - b. Enter the patient’s medical record number (MRN) or last name, first name in the “Name/MRN” field
  - c. Select the correct patient by verifying the patient’s full name, date of birth, and/or MRN
  - d. Click “Accept”
  - e. If orders are accessioned
    - i. Click on the appropriate specimen or requisition hyperlink
    - ii. Reprint the Beaker instrument-ready barcode labels via “Labels and Docs”
  - f. If orders are not accessioned
    - i. Refer to [CP 27 Registration and Order Entry into the LIS](#)
  - g. Label the specimens with the appropriate labels
    - i. Do NOT cover the patient’s name on the original label
    - ii. Verify the correct label is placed on the correct specimen type for the testing ordered
  - h. Follow [Job Aide CP 28.1 Receiving Specimens in Beaker](#)

**ii. Specimens on a Packing List / Manifest**

**1. Beaker Packing List**

- a. Scan all specimens following [Job Aide CP 28.1 Receiving Specimens in Beaker](#)
- b. Initial, date, and time the packing list
  - i. Place completed packing lists in your packing list folder in Central Processing

- c. If all specimens on the packing list are received, “Packing List Complete” will appear in a green message bar
- d. If all specimens on packing list are NOT received, the message bar will be yellow and indicate the number of specimens received out of the total number on the packing list
  - i. Click on “Specimen Lookup”
  - ii. Enter the Packing List number in the “List” field (XX-MS1234)
  - iii. Click Enter
  - iv. Click on the dropdown arrow next to the “Remove” tab
  - v. Select “Remove Received” to remove all specimens already received, leaving only unreceived specimens
  - vi. Resolve missing specimen(s)
    - 1. Verify if missing specimen(s) are included with the physical specimens received and not scanned into Beaker
    - 2. Determine if missing specimen(s) are Microbiology specimens already sent to Micro
      - a. Document specimens were sent to Micro on the packing list
    - 3. Verify if the missing specimen(s) are add-ons or need to be combined with another specimen already received for that patient
    - 4. If specimen is missing after investigation
      - a. Notify the ordering location or collection site of the missing specimen by sending an email to the lab specimen issues email list [lab\\_specimenissue\\_dl@wakehealth.edu](mailto:lab_specimenissue_dl@wakehealth.edu), with the location code as the subject

## 2. Care Evolve Manifest (all X locations)

- a. Verify each specimen on the manifest matches the physical specimens received into Central Processing
- b. Record quantity and specimen type for each patient on the manifest

- i. The following abbreviations may be use to indicate the specimen type
  1. L - Lavender
  2. G - Gold
  3. B - Blue
  4. R - Red
  5. GRN - Green
  6. GRY - Gray
  7. P - Pink
  8. Y – Yellow ACD
  9. DB – Dark Blue Heavy Metals
  
- c. Initial, date, and time the manifest
  - i. Place completed manifests in your packing list folder in Central Processing
  
- d. Resolve any missing specimen(s)
  - i. Verify if missing specimen(s) are included with the physical specimens received
  - ii. Determine if missing specimen(s) are Microbiology specimens already sent to Micro
    1. Document specimens were sent to Micro on the manifest
  - iii. Verify if the missing specimen(s) are add-ons or need to be combined with another specimen already received for that patient
  - iv. If specimen is missing after investigation
    1. Notify the ordering location or collection site of the missing specimen by sending an email to the lab specimen issues email list [lab\\_specimenissue\\_dl@wakehealth.edu](mailto:lab_specimenissue_dl@wakehealth.edu), with the location code as the subject
  
- e. Determine if specimens are labeled with instrument ready barcode labels
  - i. If instrument ready barcode labels, scan all specimens following [Job Aide CP 28.1 Receiving Specimens in Beaker](#)
  - ii. If NO instrument ready barcode labels, print Beaker instrument ready barcode labels and place on specimens
    1. In Beaker, select “Specimen Inquiry by Patient”

2. Enter the ordering location code (XABCD) in the “Submitter” field and the patient’s last name, first name in the “Name/MRN” field  
OR
3. Enter the X location code-CE number (XEHSG-CE000012)
4. Select the correct patient by verifying the patient’s full name, date of birth, and location
5. Click “Accept”
6. Click on the appropriate requisition hyperlink (RQ12345)
7. Reprint the Beaker instrument-ready barcode labels via “Labels and Docs”
  - a. All orders on the selected requisition will print
8. Label the specimens with the appropriate labels
  - a. Do NOT cover the patient’s name on the original label
  - b. Verify the correct label is placed on the correct specimen type for the testing ordered
9. Scan all specimens following [Job Aide CP 28.1 Receiving Specimens in Beaker](#)

### 3. **Wake Forest Baptist Health Specimen Manifest (Manual)**

Specimens for Clinical Laboratory testing, including Microbiology and specimens for Anatomic Pathology testing may be submitted on a Wake Forest Baptist Health Specimen Manifest

- a. Receiving Specimens for Clinical Laboratory Testing
  - i. Verify the recorded quantity of each specimen type for each patient on the manifest matches the physical specimens received into Central Processing
  - ii. Initial, date, and time the manifest
  - iii. Place completed manifest in your packing list folder in Central Processing
  - iv. Resolve any missing specimen(s)
    1. Verify if missing specimen(s) are included with the physical specimens received

2. Determine if missing specimen(s) are Microbiology specimens already sent to Micro
  - a. Document specimens sent to Micro on the manifest
3. Verify if the missing specimen(s) are add-ons or need to be combined with another specimen already received for that patient
4. If specimen is missing after investigation
  - a. Notify the ordering location or collection site of the missing specimen by sending an email to the lab specimen issues email list [lab\\_specimenissue\\_dl@wakehealth.edu](mailto:lab_specimenissue_dl@wakehealth.edu), with the location code as the subject
- v. Determine if specimens are labeled with instrument ready barcode labels
  1. If instrument ready barcode labels, scan all specimens following [Job Aide CP 28.1 Receiving Specimens in Beaker](#)
  2. If NO instrument ready barcode labels, print Beaker instrument ready barcode labels and place on specimens
    - a. In Beaker, select “Specimen Inquiry by Patient”
    - b. Enter the patient’s last name, first name in the “Name/MRN” field
    - c. Select the correct patient by verifying the patient’s full name, date of birth, and/or MRN and location
    - d. Click “Accept”
    - e. Click on the appropriate specimen or requisition hyperlink
    - f. Reprint the Beaker instrument-ready barcodes via “Labels and Docs”
    - g. Label the specimens with the appropriate labels
      - i. Do NOT cover the patient’s name on the original label
      - ii. Verify the correct label is placed on the correct specimen type for the testing ordered
  3. Scan all specimens following [Job Aide CP 28.1 Receiving Specimens in Beaker](#)
- b. Microbiology non-blood specimens should be sent on a separate manifest in a separate biohazard bag from other laboratory specimens
  - i. Microbiology non-blood specimens on a separate manifest in a separate biohazard bag should be delivered to Microbiology without opening the bag and removing any specimens

- ii. Microbiology non-blood specimens sent on the same manifest in the same biohazard bag as other laboratory specimens should follow the steps for receiving specimens for Clinical Laboratory testing
  - 1. Send the specimens to Microbiology for testing, without receiving in the LIS
  - 2. Document specimens were sent to Micro on the manifest
- c. Surgical Pathology and Cytology specimens may be transported and tracked following the Transport Services/Tracking System for Anatomic Pathology Specimens procedure
  - i. For samples transported not following the Transport Services/ Tracking System for Anatomic Pathology Specimens procedure, follow the steps for receiving specimens for Clinical Laboratory testing
    - 1. Anatomic Pathology specimens do not require an instrument ready barcode and receipt via scanning into the LIS
    - 2. Samples will be placed into the corresponding laboratory sections specimen bin upon receipt
      - a. Refer to [CP 9 Cytology Specimen Handling](#), [CP 23 Pap Smear and Pap Smear Aliquot Receipt](#), and [CP 10 Surgical Pathology/Histology Specimen Handling](#) procedures

### **3. Review/Revision/Implementation:**

- a. All procedures must be reviewed at least every 2 years.
- b. All new procedures and procedures that have major revisions must be signed by the CLIA Laboratory Medical Director.
- c. All reviewed procedures and procedures with minor revisions can be signed by the designated section medical director.

### **4. Related Procedures:**

- a. [CP 4 Patient ID and Identification of Blood, Body Fluids, and Tissue Samples](#)
- b. [CP 13 Incident Credit Reports](#)
- c. [CP 5 Specimen Handling](#)
- d. [CP 27 Registration and Order Entry into the LIS](#)



- e. [CP 9 Cytology Specimen Handling](#)
- f. [CP 23 Pap Smear and Pap Smear Aliquot Receipt](#)
- g. [CP 10 Surgical Pathology/Histology Specimen Handling](#)

**5. References**



**6. Attachments**

- a. [Job Aide CP 28.1 Receiving Specimens in Beaker](#)

**7. Procedure Distribution Outside of Central Processing**

**8. Revised/Reviewed Dates and Signatures**

Review Date	Revision Description	Signature
3/8/2019	Original document written.	Jennifer A. Hausman, MLS(ASCP)SBB <sup>CM</sup>

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<b>CLIA Medical Director Signature:</b> 		<b>Approved Date:</b>	3/8/19

**Procedure:**

**Receiving Instrument-Ready Barcode Labeled Specimens WITH a Barcode Scanner**

1. Select the receiving activity
2. Click “Scan”, if not already selected
3. Scan the instrument-ready barcode on each specimen
4. Verify specimen has been received
  - a. A green check mark will appear in the “Received Status” box
  - b. If no green check mark appears and/or you receive a **red message bar**
    - i. Determine the cause for the specimen to not be received following the “Causes of Specimen Receipt Errors in Beaker” section
5. Place in appropriate racks or bins for delivery to the testing area

**Receiving Instrument-Ready Barcode Labeled Specimens WITHOUT a Barcode Scanner**

1. Select the receiving activity
2. Click “Scan”, if not already selected
3. Click “Specimen Lookup”
4. Enter the Accession Number or Specimen ID (7000 number) in the Specimen box
5. Click Enter
6. Update collection information, if necessary
7. Click “Receive”
8. Select Override Reason for not scanning
9. Click “Accept”

10. Verify specimen has been received
  - a. A green check mark will appear in the “Received Status” box
  - b. If no green check mark appears and/or you receive a red message bar
    - i. Determine the cause for the specimen to not be received following the “Causes of Specimen Receipt Errors in Beaker” section
11. Place in appropriate racks or bins for delivery to the testing area

### **Causes of Specimen Receipt Errors in Beaker**

1. Missing Collection Date and Time
  - a. Click “Apply Defaults”
  - b. Click “Receive”
2. Specimen already received in “another location”
  - a. Change context to the other location
  - b. Create, Ready, and Pick up a packing list to WC Lab
  - c. Change context back to MC SB M CLINICAL CORE LABS
  - d. Receive specimens
3. Specimen Receiving Filter rule URINE COLLECTION QUESTION UPON RECEIVING
  - a. Click “Details” tab
  - b. Verify the urine interval is correct – “Time Interval of Collection?”
    - i. The order must match the specimen type received – random or 24 hour
  - c. Enter the total volume of urine received - “Patient’s Total Urine Volume?”
    - i. Random urine orders received in a 3 milliliter (mL) urine chemistry tube, enter “3”
    - ii. Random urine orders received in a urine cup, enter the total volume in milliliters
    - iii. 24 hour urine orders, enter the total volume of the full 24 hour collection in milliliters
      1. 1 gram of weighed urine equals 1 milliliter (mL)

4. Another person in patient's record
  - a. Wait 1-3 minutes and try receiving the specimen again
  - b. If record is still locked
    - i. Call the patient's location to speak with the person locking the record
    - ii. Ask the person to please close the patient's record as you are unable to receive their laboratory specimens
  
5. Test cancelled or resulted prior to receipt
  - a. Verify that the scanned accession was cancelled or resulted
  - b. Determine if additional orders should be collected in Beaker
    - i. If additional orders, confirm with patient's care team if the orders should be completed on the physical specimen(s) received
      1. If so, process orders
      2. If not, order specimen(s) as an extra tube