
	<b>CP 12</b> <b>Creating Packing Lists /</b> <b>Manifests for Transport of</b> <b>Clinical Lab Specimens</b>	<b>Department:</b>	Central Processing Lab
		<b>Effective Date:</b>	2/14/15
		<b>Revised Date:</b>	3/12/2019
		<b>Contact:</b>	Central Processing Lab Section Manager
<b>CLIA Medical Director Signature:</b> 		<b>Approved Date:</b>	3/13/19

**1. General Procedure Statement:**

**a. Purpose:** To give guidelines to team members for creating a packing list/manifest for specimen transport and tracking. To track packing list and manifest creation errors to ensure quality patient care is delivered.

**b. Responsible Department/Scope:**

- i. Procedure owner/Implementer: Central Processing
- ii. Procedure prepared by: Jennifer Hausman & Melissa Laubach
- iii. Who performs procedure: Outpatient Phlebotomy, Outreach Phlebotomy, Clinical Lab, and Central Processing Team Members; Laboratory clients sending samples via courier

**2. Procedure:**

**Note: Separate packing lists/manifests are required based on testing ordered**

- All **Non-Blood** specimens for Microbiology with a section code of SR or MC in the accession number must be on a separate packing list/manifest and placed in a separate bag labeled with a green MICRO LAB label (if no labels are available, write MICRO on the outside of the bag)
- Blood cultures with a section code of MC in the accession number must be on a packing list/manifest and placed in a separate bag labeled with a green MICRO LAB label
- All Blood specimens for Microbiology with a section code of SR in the accession number may be placed on a packing list/manifest with other blood specimens for clinical testing

- All 24 Hour Urine collection tests must be on a separate packing list/manifest  
Exception: Serum specimens for Creatinine Clearance, Serum CREATININE may be included on the packing list/manifest with a Urine Creatinine Clearance test
- All Surgical Pathology and Cytology specimens must be placed on a separate manifest following the [Transport Services/Tracking System for Anatomic Pathology Specimens procedure](#)

**a. Creating a Packing List in Beaker**

- i. In Epic Beaker, open the “Packing List Editor” function
- ii. Click “Create”
- iii. Select “Miscellaneous Packing List” from the List Type dropdown menu
- iv. Click “Accept”
- v. Scan all Beaker barcode labeled specimens under the “Container” column
  1. Specimens with multiple aliquot specimens such as .1 and .2 must all be scanned
  2. **Maximum of 35** specimens per packing list
  3. The number of specimens on the packing list must match the number of specimens placed in the bag
  4. Each small bag of specimens must have its own packing list
  5. Do not mix specimens from different packing lists in the same small bag
  6. Specimens requiring transportation on ice must be placed on a separate packing list and in a separate bag
  7. STAT specimens must be placed on a separate packing list from routine specimens and bagged separately in a RED STAT bag
  8. To remove a specimen from the packing list, click on the box containing the specimen’s container ID and click “Delete” on the keyboard or right click and “Delete”
- vi. Select the Destination in the dropdown menu
- vii. Verify the correct destination was selected
- viii. Incorrect location will delay patient testing

- ix. Click “Ready”
- x. Click “Picked Up”
  - 1. Two (2) packing lists will automatically print
- xi. Initial both copies of the packing list
- xii. Place one (1) copy with the samples in a biohazard bag
- xiii. Retain one (1) copy at your location
  - 1. If the packing lists do not print, verify that the “Picked Up” button has been selected

#### **b. Creating a Care Evolve Manifest**

**Note:** All specimens should be submitted with a Care Evolve manifest. Individual requisitions may be printed and included with a patient’s specimens, but are not required when using barcoded labels.

- i. In Care Evolve, select “Orders”
- ii. Select “New Manifest”
- iii. All patients will be selected by default
- iv. Verify all patients listed are the specimens to be placed together in the biohazard bag per separate manifest requirements above
  - 1. **Maximum of 25 specimens** per manifest
  - 2. Specimens requiring transportation on ice must be placed on a separate manifest and in a separate bag
  - 3. STAT specimens must be placed on a separate manifest from routine specimens and bagged separately in a RED STAT bag
- v. Deselect patients whose specimens will not be included
- vi. Select “Print Manifest”
  - 1. A pdf version of the manifest will pop-up
- vii. Select the printer icon
- viii. Change Copies to “2”
- ix. Select “Print”

- x. Record the total number of specimens sent on the manifest
  - 1. The number of specimens on the manifest must match the number of samples placed in the bag
  - 2. Total number of each specimen type per patient may be included
- xi. Initial both copies of the packing list
- xii. Place one (1) copy with the samples in a biohazard bag
- xiii. Retain one (1) copy at your location

**c. Creating a Manual Manifest**

- i. Open the electronic version of the manual manifest or obtain a printed copy of the manifest specific for the specimen type(s) to be transported
  - 1. [Wake Forest Baptist Health Specimen Manifest for Clinical Specimens](#) (Form CP 12.1), excluding Microbiology cultures
  - 2. [Wake Forest Baptist Health Specimen Manifest for Microbiology Specimens](#) (Form CP 12.2)
  - 3. [Wake Forest Baptist Health Specimen Manifest for Surgical Pathology and Cytology Specimens](#) (Form CP 12.3)
- ii. Enter the location name/code and phone number in the “Location” box
- iii. Enter the current date in the “Date” box
  - 1. If using the electronic version, the current date will automatically populate
- iv. Enter the patient’s full name – Last Name, First Name – in the Patient Name column
- v. Count the total number of each tube type and enter in the appropriate column across from the patient’s name
  - 1. Clinical Specimens Abbreviations
    - a. **GLD:** gold
    - b. **BL:** blue
    - c. **LV:** lavender
    - d. **GR:** dark green or light green (Na or Li Heparin)
    - e. **DKB:** dark blue
    - f. **PN:** pink
    - g. **GRY:** gray

- h. **RD:** red
- i. **YEL:** yellow
- j. **UA:** Urine conical tube for urinalysis testing
- k. **URINE CHEMISTRY:** clear tube for urine chemistries
- l. **OTHER:** other specimens for clinical testing
  - i. Examples: Quantiferon kits, Fecal Occult Blood cards, Fluid samples for clinical testing

## 2. Microbiology Specimens Abbreviations

- a. **Culture Swab:** any swab for culture
  - b. **GC (Urine or Swab):** Urine or swab for GC testing
  - c. **GC (Pap):** Pap smear vial for GC testing
  - d. **Stool:** All stool samples for Microbiology testing
  - e. **Urine Culture:** Urine culture tubes or urine cups for culture
  - f. **Viral Media:** Conical blue top tube with pink media
  - g. **Other:** other specimens for Microbiology testing
    - i. Examples: Blood cultures, KOH/Wet Prep, Fluid samples for culture
- vi. Total the number of each specimen type and a grand total of specimens
- 1. If using the electronic version, the totals will automatically calculate
  - 2. Each small bag of specimens must have its own manifest
  - 3. Do not mix specimens from different manifests in the same small bag
  - 4. **Maximum of 25** specimens per manual manifest
  - 5. Specimens requiring transportation on ice must be placed on a separate manifest and in a separate bag
  - 6. STAT specimens must be placed on a separate manifest from routine specimens and bagged separately in a RED STAT bag
- vii. Verify that the grand total matches the number of specimens placed in the bag for transportation
- viii. If a specimen needs to be removed from the manifest, cross out the patient's name and/or specimen total with one line and initial
- 1. Example: ~~Monster, Cookie~~

- ix. Specimens for cancelled tests should be removed from the manifest
  - 1. If you cannot cancel the test(s) yourself in Beaker or Care Evolve, contact Client Services at 877-933-9522 or 336-716-2610
- x. Sign the manifest in the “Preparer’s Signature” box
  - 1. Your signature states the information provided is correct and the specimens listed on the manifest match those placed in the bag
- xi. In the “Notes” box, define the specimen type or special requirements for all specimens counted in the OTHER column

**Note:** The laboratory contracts specimen courier services to an outside company. The couriers are not responsible for reconciling manifests.

#### **d. Tracking of Packing List / Manifest Creation Errors**

- i. When the Creating Packing Lists / Manifests for Specimen Transport procedure is not followed, an Incident Report or RL6 may be completed to track errors and identify process improvements to ensure quality patient care
  - 1. Examples of Errors include, but are not limited to:
    - a. Over-sized batches
    - b. Specimens sent not included on a packing list/manifest
    - c. Missing specimens that are listed on the packing list/manifest
    - d. Specimens on ice or frozen not send on a separate packing list/manifest
    - e. Microbiology or Anatomic Pathology specimens not on separate packing lists/manifests and not bagged separately
    - f. STAT specimens not on separate packing lists/manifests and not bagged separately from routine specimens
    - g. Packing list/manifest not submitted with specimens
    - h. Signature missing from completed packing list/manifest
    - i. Contact information for location not completed on manual manifest

### **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. [Transport Services/Tracking System for Anatomic Pathology Specimens procedure](#)

### **5. References**

### **6. Attachments**

- a. [Wake Forest Baptist Health Specimen Manifest for Clinical Specimens](#) (Form CP 12.1), excluding Microbiology cultures
- b. [Wake Forest Baptist Health Specimen Manifest for Microbiology Specimens](#) (Form CP 12.2)
- c. [Wake Forest Baptist Health Specimen Manifest for Surgical Pathology and Cytology Specimens](#) (Form CP 12.3)

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

- a. Outpatient Phlebotomy
- b. Outreach Phlebotomy
- c. Davie Medical Center Laboratory
- d. Lexington Medical Center Laboratory
- e. Wilkes Medical Center Laboratory
- f. High Point Medical Center Laboratory
- g. Cornerstone Laboratories
- h. Clemmons Laboratory
- i. Wake Forest Hematology/Oncology Clinics, as applicable

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

Review Date	Revision Description	Signature
3/12/19	Updated SOP for Beaker, Care Evolve, and manual manifests. Incorporated tracking of packing list/manifest creation errors.	Jennifer A. Hausman, MLS(ASCP)SBB <sup>CM</sup>













