Add-on Orders (Formerly CP11)

Wake Forest Baptist Health	DOCUMENT TYPE: ⊠ Procedure	ORIGIN DATE IN TITLE 21 03/11/2020
CLIA Lab Director:	LAB DEPARTMENT:	Contact:
Dr. Gregory Pomper	Central Processing Lab	Central Processing Lab

APPLICABLE LABORATORI(S).
☐ Lexington Medical Center (LMC)
☐ Davie Medical Center (DMC)
☐ Wilkes Medical Center (WMC)
☐ High Point Medical Center (HPMC)

ADDITION OF LABORATORY (C)

☐ Westchester

☐ Clemmons

PROCEDURE STATEMENT

Add-on tests save patients from having to be recollected for labs when an acceptable sample already exists in the laboratory. This procedure provides guidelines to Central Processing staff for adding on tests to samples that are in the laboratory.

SCOPE

- i. Procedure Owner/Implementer: Central Processing Lab
- ii. Procedure Prepared by: Central Processing Management
- iii. Who Performs Procedure: Central Processing Team Members

DEFINITIONS

- A. Procedure: A process or method for accomplishing a specific task or objective.
- B. WFBH Lab System: Wake Forest Baptist Lab System is a health system that includes Wake Forest Baptist Medical Center and all affiliated organizations including Wake Forest University Health Sciences (WFUHS), North Carolina Baptist Hospital (NCBH), Lexington Medical Center (LMC), Davie Medical Center (DMC), Wilkes Medical Center (WMC), High Point Medical Center (HPMC), Lab at Westchester and Lab at Clemmons.
- C. MRN: Medical Record Number

POLICY GUIDELINES

A. Procedure

1. Inpatient providers and providers of Wake-owned clinics may place add-on orders in WakeOne. The add-on orders appear in the Add-On In Basket of Central Processing and Client Services staff.

2. Completing Basic Add-Ons from In Basket

- a) Click on the In Basket. Click on an add-on request from the list and view available specimens. Refer to section 3 for verifying specimen type and stability.
- b) If an acceptable specimen is in WC Lab, click the Select hyperlink to add the test to the specimen. A Beaker label will print. Deliver add-on labels to the appropriate testing bench add-on bins, or give labels to Spin person to deliver.
- c) Check that the accession number is a Winston Campus accession (for example, a 21W number). Add-ons for pediatric patients might route to the wrong campus; these will need to be sent for redraw, then collected from Order Inquiry using the original sample's collection date and time.
- 3. Checking Acceptable Specimen Type and Test Stability
 - The Procedure Catalog in Beaker lists acceptable specimen types for lab tests. Open the Procedure Catalog and search for the requested add-on test.
 - b) Refer to the WC Lab container types that are acceptable for the add-on test.
 - c) To find sample stability for a test or panel, refer to Attachment A: Stability Reference or search for the test's procedure in Title 21.

4. Cancer Center Lab Add-Ons

- a) The Cancer Center Lab is open from 7:30am to 5:00pm Monday-Friday.
- b) Cancer Center Lab employees will complete their add-ons during operating hours. After hours, Central Processing will complete add-ons for Cancer Center samples.
- c) See Attachment B for steps to complete add-ons for Cancer Center samples after hours.
- 5. Add-Ons to Samples in Family Practice Lab or Hematology Oncology Labs
 - a) Determine if sample type and stability are acceptable for suggested specimen. See Attachment A: Stability Reference.
 - b) Call the practice or lab to ask them to send the sample for the add-on. See Table 1 for contact information.

Lab or Practice Name	Contact Number	Alternate Contact
Family Practice Lab	6-5680	In-basket to Pool "PPI FAM
(21F samples)		MED LAB STAFF"
Statesville Hematology	704-872-3630	In-basket to Pool
Oncology (21SO samples)	Ask to speak to someone in	"STATESVILLE HEMONC
	the lab	CLINICAL"
Elkin Hematology Oncology	336-835-9589	
(21E samples)		
Lexington Hematology	3-0054	
Oncology (21LO samples)		
Mount Airy Hematology	336-786-8880	
Oncology (21MO samples)	Ask to speak to someone in	
	the lab	

Table 1. Outside Practices/Labs Contact Information

- 6. Sendout/Referral Test Add-On Requests
 - a) Referral tests must be on a separate accession number. Do not use the Select function in the Add-On In Basket for referral tests.
 - b) See Attachment C: Referral Testing Add-Ons for steps to complete these Add-On requests.
- **7.** Special Hematology Test Add-On Requests
 - a) When a special hematology test is requested to be added to a coag sample, check the Stability Reference to see if the sample is still acceptable for testing.
 - b) If the sample is acceptable, add the test in the Add-On In Basket. Place on a packing list to Special Hematology. Leave the label and a note at the coag bench to bring the sample to Central Processing.
 - c) If coag testing is still in progress, write "Share" on the label and include a note with the label to return the sample and label to Central Processing when coag testing is completed. When sample comes to Central Processing, place on a packing list to Special Hematology.
- 8. Handling requests for CMEP to be added to BMEP
 - a) See Attachment D for instructions on adding additional tests to a BMEP without adding duplicate tests.
 - b) See Attachment E for Beaker panels and their included tests.
- 9. Handling requests for CBCD to be added to CBC
 - a) See Attachment G: Adding Differential Only to CBC
- **10.** Handling requests for DIC panel to be added to existing coag sample

- a) See Attachment H: Adding DIC Panel Tests
- **11.** Finding your completed Add-Ons when a label didn't print
 - a) If a label does not print and you need to find which add-ons you performed:
 - i. In the In Basket screen, click on Completed Work (link at the bottom left corner)
 - ii. Click Add-Ons
 - iii. Completed Add-Ons will appear in a list. To re-print a label, you will need to open Specimen Inquiry by Patient click on the accession you added to and click on Labels Print Labels.

12. Forwarding Add-Ons to Other Labs

- a) If the original sample is not in WC Lab, there are other locations that the Add-On request can be forwarded to for completing.
- b) Add-On In Basket (Pool) Locations:

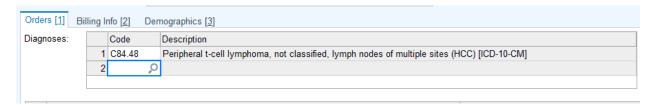
Sample Location	Pool Name	
Clemmons Medical Center Lab	Clemmons Lab Add-Ons	
Cornerstone Westchester Lab	Cornerstone Lab Westchester Add-Ons	
Davie Medical Center Lab	DMC Lab Add-Ons	
High Point Medical Center Lab	HPMC Lab Add-Ons	
Lexington Medical Center Lab	LMC Lab Add-Ons	
Wilkes Medical Center Lab	Wilkes Hospital Lab Add-Ons	

c) Refer to Attachment F: Forwarding Add-Ons for instructions on forwarding.

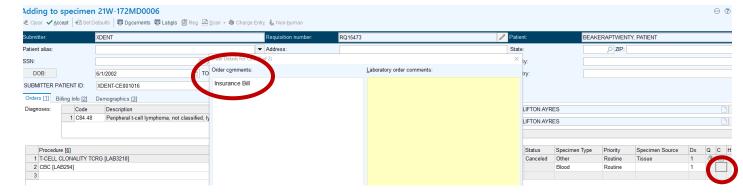
13. Outreach Add-On Requests

- a) Outreach locations (X locations) will complete the top section of an Outreach Add On Request Form. See Attachment. Completed Forms will be faxed to the Client Services fax machine.
- b) Look up the patient in Beaker by name/DOB and X location. Determine if an acceptable specimen is available to add the requested test(s).
- c) Click on the intended specimen and click on Specimen Update.
 - i. Alternately, click on the Requisition hyperlink (RQXXXXX) and then click on Requisition Entry. Proceed to step e.
- d) Click on Add-ons drop down and select New Orders.

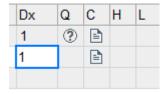
e) Add the diagnosis code if it is not already listed (find this information on the Outreach Add On Request Form). Click on the last diagnosis code listed and a box will open below. Enter the new diagnosis code.



- f) In the Procedure list, scroll down to the next available row. Type the test to be added. Select the correct test from the Order Search window and click Accept.
- g) Click in the Comments box and type in the billing type (Insurance Bill, Client Bill, or Patient Bill) as an Order Comment (find this information on the Outreach Add On Request Form):



h) In the Dx box (by the Comment box) – enter the row number associated with the correct diagnosis code.



- Click Create Specimens and Receive. Click Accept. The add-on is completed.
- j) Fill out the bottom section of the Outreach Add On Request Form:
 - i. Date original specimen was collected (DOS)
 - ii. Original accession number (accession being added to)
 - iii. Time and Date add-on completed
 - Initials of person completing the request

k) If the specimen stability is exceeded or any other problem that prevents the add-on from being completed, note the problem on the Add On Request Form. Document who was notified that the add-on could not be completed.

REFERENCES

None

RELATED PROCEDURES/POLICIES

None

ATTACHMENTS/LINKED DOCUMENTS

Attachment A: Stability Reference – See Title 21

Attachment B: Cancer Center Add-Ons Attachment C: Referral Testing Add-Ons

Attachment D: CMEP requested to add to BMEP Attachment E: Beaker Panels and Included Tests

Attachment F: Forwarding Add-Ons

Attachment G: Adding Differential Only to CBC

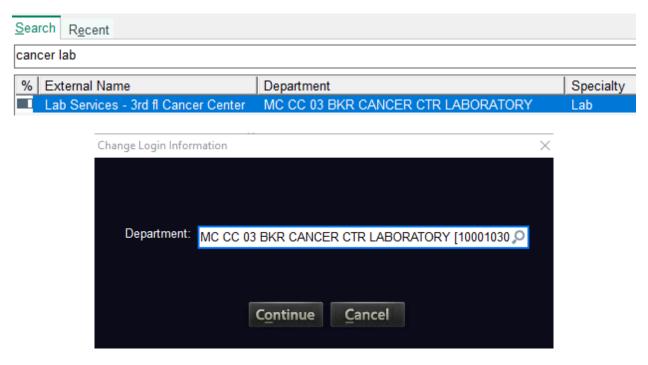
Attachment H: Adding DIC Panel Tests

Attachment I: Outreach Add On Request Form - See Title 21

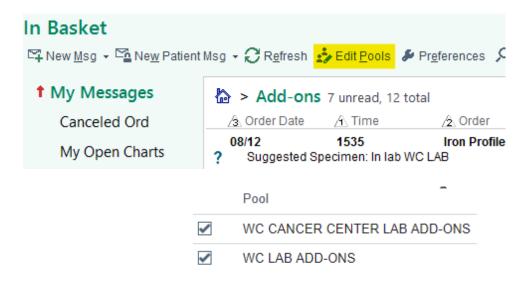
REVISION DATES: REVIEW CHANGE SUMMARY AS REPRESENTED IN TITLE 21.

Attachment B: Cancer Center Add-Ons

- 1. Change Context in Beaker to the Cancer Center Lab:
 - a) Change Context either by clicking the drop down arrow next to Log Out (at top right of window), or by searching Change Context in the search function.
 - b) **MC CC 03 BKR CANCER CTR LABORATORY** is the correct context for the CC Lab. You can search using "cancer lab" to find and select this context.



- **2.** Open the Add-On In Basket and check that you are signed into the WC Cancer Center Lab Add-Ons pool:
 - a) Click on Edit Pools. Make sure the box is checked for WC CANCER CENTER LAB ADD-ONS.

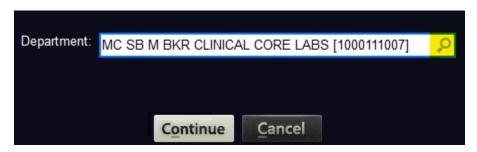


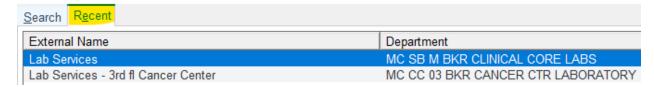
3. Complete add-ons by clicking the Select hyperlink for the intended specimen. A label will print.



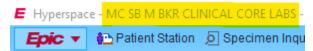
4. Change Context in Beaker back to the core lab context:

MC SB M BKR CLINICAL CORE LABS is the correct core lab context. You can also click the spyglass, and click on the Recent tab to find your recent context.





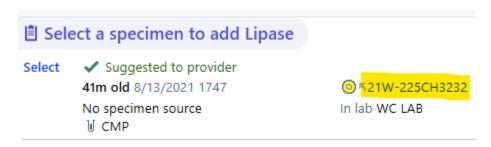
5. Verify you are back in the Core Labs context by looking at the top left of the window. It should list **MC SB M BKR CLINICAL CORE LABS**.



6. Double scan the add-on label to receive the add-on into WC Lab.

Attachment C: Referral Testing Add-Ons

1. If an acceptable sample is available in WC Lab, open Specimen Inquiry for that sample. You can click on the accession hyperlink in the Add-On In Basket to open Specimen Inquiry.



- 2. Print a label for the specimen. Record the collection date/time on the label. You will need this later.
- 3. From Specimen Inquiry window, click on Patient Inquiry.



4. In Patient Inquiry window, click on the Order Inquiry tab. Find the referral test that is being requested as an Add-On. The Lab Status column will read "Pending Add-On."



5. Highlight the referral test in Order Inquiry and click Collect Specimens. At the pop-up box, click Continue collection.



- 6. Print Labels. Enter collection date/time that you recorded in step 2. Receive.
- 7. On the referral test label, write "refer to" and the container ID from the original specimen (for example, refer to 7012130010). Discard the original container label printed in step 2.
- 8. Place the label in the Add-Ons bin at the appropriate bench where the original sample is located.

Page 9 of 20

Attachment D: CMEP Requested to add to BMEP

- 1. When there is a BMEP sample in the lab, and a provider requests a CMEP as an add-on, this contains duplicate tests.
- a) If the BMEP is <u>not</u> resulted yet:
 - Add on the CMEP
 - Cancel the BMEP with the reason "Floor duplicate order"
 - Add comment: "Part of CMEP"
- b) If the BMEP is resulted:
 - Contact the patient care unit/provider to determine if all tests are needed as a new collection, or if they just need the additional tests in a CMEP.
 - If all tests are needed as a new collection, send the CMEP for new collection.
 - If only the additional tests are needed, ask the provider/floor to order a Hepatic Function Panel (LAB20) as an add-on to the BMEP.
 - Notify the provider/floor that the Hepatic Function Panel includes a **direct bilirubin** in addition to the tests in a CMEP.
 - If the direct bilirubin is not wanted, they will need to order tests individually: Albumin, Alkaline Phosphatase, Total Bilirubin, Total Protein, SGOT, and SGPT.
 - If the floor requests that lab enters the additional orders, obtain the requesting person's name AND the provider's name. Enter the order using order mode "Telephone with Read Back" and enter the ordering provider's name.
 - Cancel the CMEP add-on order using reason "Floor duplicate order" and add the comment "Added HFP to BMEP."

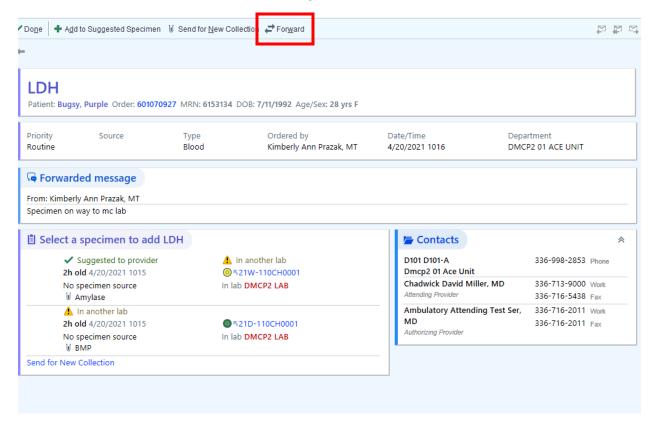
Attachment E: Beaker Panels and Included Tests

Panel Included Tests

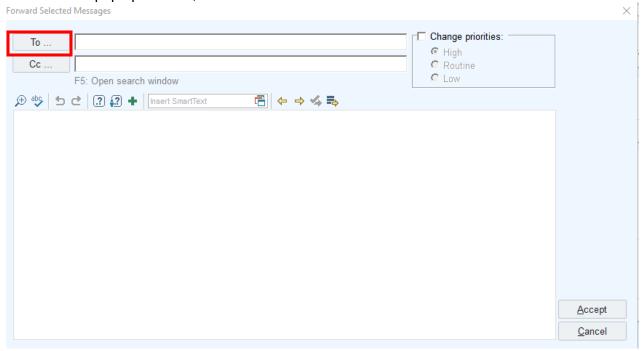
Panei	included lests	
	Na, K, CI, CO2, BUN, GLU, CRT, CA,	
CMEP: Comprehensive Metabolic Panel, LAB17	PROT, ALB, TBIL, ALP, AST, ALT	
·		
BMEP: Basic Metabolic Panel, LAB15	No K CL CO2 BLIN CLLL CBT CA	
DIVIER. Dasic Wetabolic Patiel, LADTS	Na, K, Cl, CO2, BUN, GLU, CRT, CA	
HFP: Hepatic Function Panel, LAB20	PROT, ALB, TBIL, DBIL, ALP, AST, ALT	
	Na, K, Cl, CO2, BUN, GLU, CA, PHOS,	
RFP: Renal Function Panel, LAB19	ALB, CRT	
Flootraluta Danal I AB16	No. K. Cl	
Electrolyte Panel, LAB16	Na, K, Cl	
Lipid Profile/Panel, LAB2960	CHOL, TRIG, HDL, LDLD	
Lipid i Tollic/T allel, LAB2300	Transferrin	
	Iron	
L D (II LABORDO	Ferritin	
Iron Profile, LAB2939	UIBC	
	TSH	
	Total T4	
	T3 Uptake	
Thyroid Panel, LAB4023	Free Thyroxine Index	
	Hep B Surface Antibody	
	Hep B Surface Antigen	
	Hep B Core Antibody	
	Hep C Antibody	
Hepatitis Panel, LAB3309	Hep A Antibody	
Tiepatitis Fariei, LAD5509		
	Hep B Surface Antibody	
	Hep B Surface Antigen	
D D	Hep B Core Antibody	
Dialysis Panel, LAB3175	Hep C Antibody	
	AMPH	
	BARB	
	BENZ	
	COC	
	OP2	
UDS: Urine Drug Screen, LAB2751	THC	
, <u> </u>	UALC	
	AMPH METH	
	BARB OP2	
	BENZ OXY	
	BUP THC	
LIDS Comprehensive LAB4904		
UDS Comprehensive, LAB4801	COC UCRT	
	D-Dimer	
	PT-INR	
	PTT	
DIC Panel, LAB3080	Fibrinogen	
	PT-INR	
	PTT	
PT/aPTT, LAB3145	Fibrinogen	
t e e e e e e e e e e e e e e e e e e e	. –	

Attachment F: Forwarding Add-Ons

- 1. Highlight the Add-On request on the list. The Suggested Specimen will be in another lab. For example, "Suggested Specimen: In DMCP2 Lab."
- 2. Click the Forward button on the top right of the window:

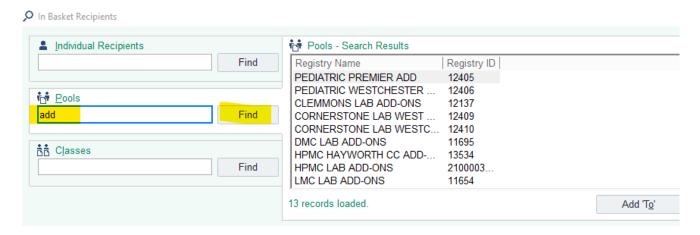


3. In the pop up window, click the To button:

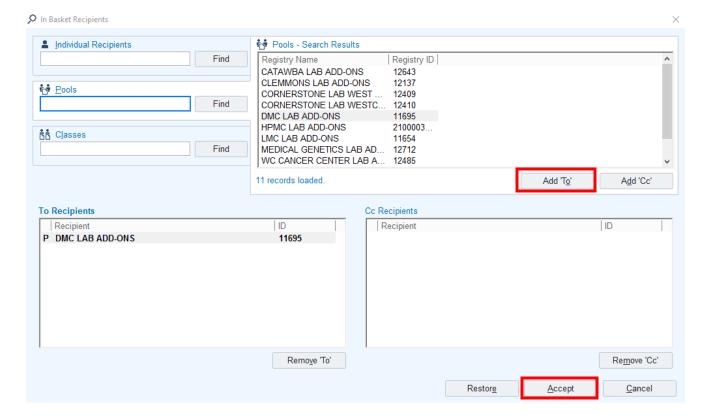


Page 12 of 20

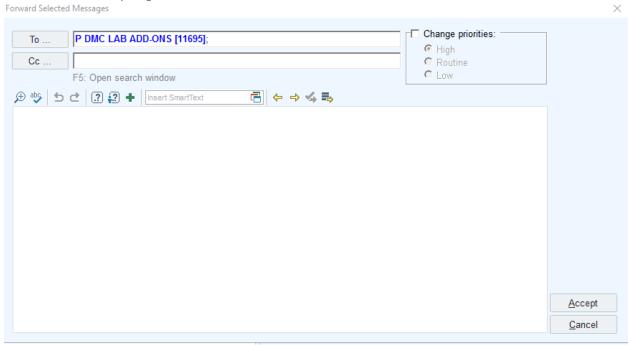
4. Search for the appropriate Pool: click in the Pool box, type "Add" and click Find:



5. Select correct location and click Add To, then Accept:



6. Click Accept again in the next window:



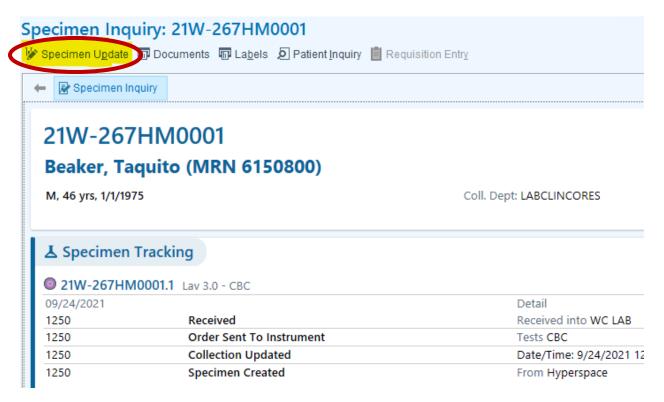
7. Add on has now been forwarded to the correct In Basket.

Attachment G: Adding Differential Only to CBC

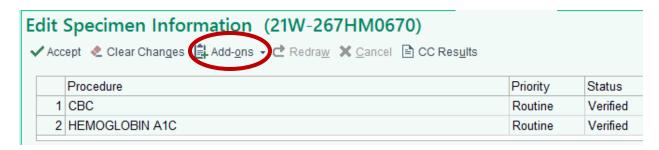
- 1. When there is a CBC sample in the lab, and the provider requests a CBCD add-on, this contains duplicate tests. We can add a Differential Only (DIFF ONLY) to the CBC sample.
- 2. Jot down the authorizing provider for the CBCD add-on. You will need this later.
- 3. Click on the link to the CBC sample from the add-on screen:



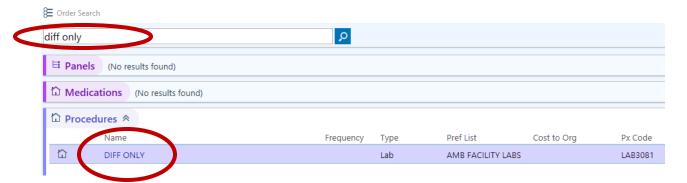
4. In the Specimen Inquiry screen, click on Specimen Update:



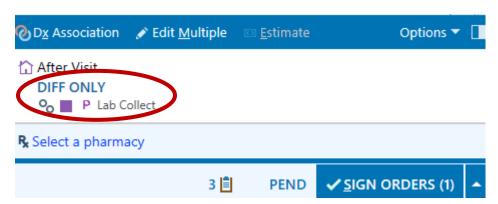
5. In Specimen Update, click the Add-Ons drop down and select New Orders:

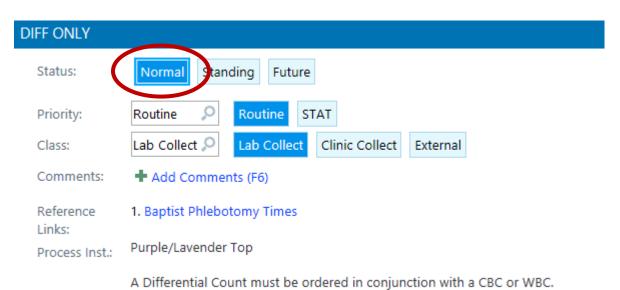


6. In the Orders window, type Diff only and search. Select DIFF ONLY from the Procedures list.



7. Change order status to Normal. Click on the order at the bottom right window. Click Normal in the Status row. Click Accept.

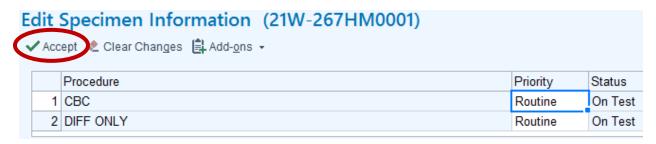




8. Associate diagnosis by clicking the check box.

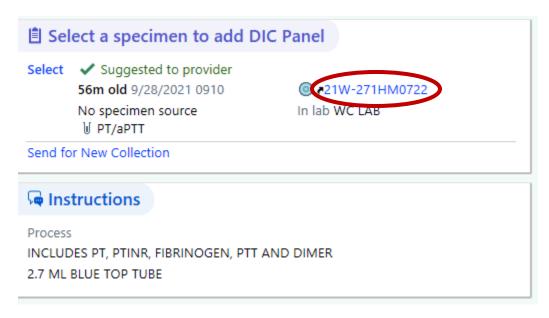


- 9. Enter the Authorizing Provider (from Step 2). Click Accept.
- 10. Click Accept in Specimen Update. A label will print and the add-on is complete.



Attachment H: Adding DIC Panel Tests

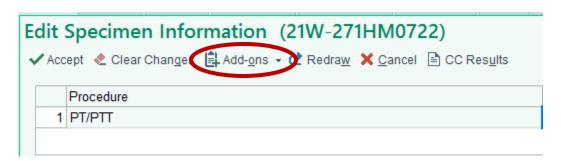
- 1. When there is a PT/PTT or D-Dimer sample in the lab, and the provider requests a DIC Panel add-on, this contains duplicate tests. We can add individual tests to the existing coag sample.
- 2. Jot down the authorizing provider for the DIC Panel add-on. You will need this later.
- 3. Click on the link to the coag sample from the Add-On screen:



4. In the Specimen Inquiry screen, click on Specimen Update:

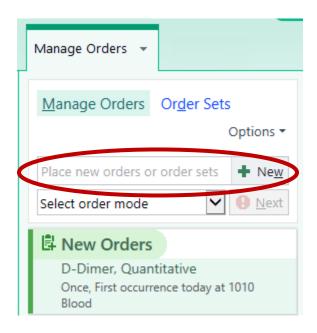


5. In Specimen Update, click the Add-Ons drop down and select New Orders:

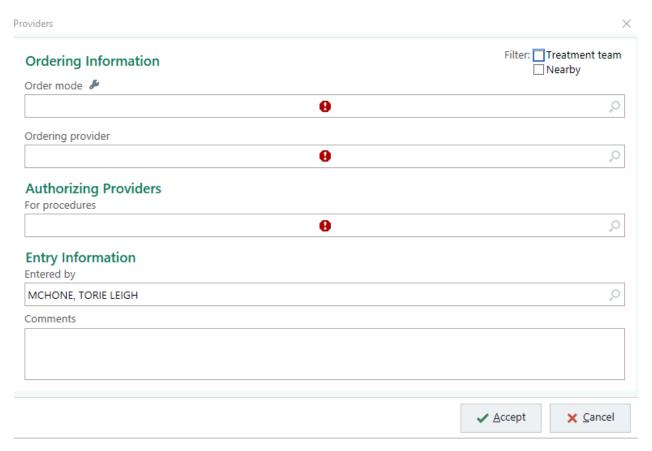


6. In Manage Orders, type the test that is needed. In this example, a D-dimer is the only test needed to complete a DIC Panel.

See Attachment E for tests included in PT/PTT and DIC Panel.



7. Sign Order. A pop-up will prompt you to enter Order Mode (Written), Ordering and Authorizing Provider. Use the provider recorded in step 2.



8. Back in the Specimen Update activity, click Accept. A label will print.

