	DOCUMENT TYPE: Procedure	ORIGIN DATE 03/11/2020
CLIA Lab Director: Dr. Gregory Pomper	LAB DEPARTMENT: Central Processing Lab	CONTACT: Central Processing Lab

APPLICABLE LABORATORY(S):

- North Carolina Baptist Hospital (NCBH)
- Lexington Medical Center (LMC)
- Davie Medical Center (DMC)
- Wilkes Medical Center (WMC)
- High Point Medical Center (HPMC)
- Westchester
- Clemmons

PURPOSE

The purpose of add-on tests is to 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 and Client Services staff for adding on tests to samples that are in the laboratory.

SCOPE

This procedure applies to Central Processing and Client Services 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

SUPPLIES/MATERIALS

Beaker labels

PROCEDURE GUIDELINES

A. Procedure

1. Inpatient providers and providers of Wake-owned clinics may place add-on orders in Epic. 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 Winston 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 24WIN number).
3. Checking Acceptable Specimen Type and Test Stability
 - a) 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 Winston 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. Add-on Unable to Be Performed
 - a) Check the patient's location. Find this under the Department header or under the Contacts header in the Add-ons in basket. The example below is an inpatient on 6CC.

URIC ACID

Patient: [REDACTED] Order: 699435525 MRN: [REDACTED] DOB: [REDACTED] Age/Sex: 54 yrs M

Priority	Source	Type	Ordered by	Date/Time	Department
Add-On	Venous	Blood	Mary-Peyton Ashley Knapp, MD	3/15/2024 1442	WFMC CC 06 UNIT

Questions

Order Question	Answer
Release to patient:	Immediate

Select a specimen to add Uric Acid

Select	✓ Suggested to provider	⚠ Near expiration
9h old	3/15/2024 0606	🕒 24WIN-075C00193
Venous		In lab WINSTON LAB
✓ CMP	✓ MG	✓ PHOS
Select	⚠ Near expiration	🕒 24WIN-074C00133
1d old	3/14/2024 0603	In lab WINSTON LAB
Venous		
✓ CMP	✓ MG	✓ PHOS

Contacts

C613	336-713-6259	Phone	Rupali Roy	336-713-5440	Work
A			Bhave, MD	336-713-5445	Fax
Wfmc			Authorizing/Attending		
Cc 06					
Unit					

Inpatient add-on request. Ordering department highlighted.

- b) If the add-on cannot be performed on an inpatient, click the Send for New Collection button.
- c) If the add-on cannot be performed on an outpatient:
 - i. Click on Order Inquiry from toolbar or use (...) dropdown to select Order Inquiry.
 - ii. If you get a pop-up to create addendum, click Create Addendum.
 - iii. Select the add-on order that cannot be added.
 - iv. Click Cancel. At the pop up window, select Reason: Unable to Add On Tests to Existing Specimen (code 51005).
 - v. This cancel reason automatically generates an in-basket message to the ordering provider to notify them the add-on could not be completed.

Message

Send for New Collection **Order Inquiry** Forward

BILIRUBIN (TOTAL, DIRECT, INDIRECT)

Patient: [REDACTED] Order: 698709076 MRN: [REDACTED] DOB: [REDACTED] Age/Sex: 41 yrs M

WARNING: This is an Outpatient add-on request. DO NOT send this order for new collection.

If this add-on is unable to be performed, go to Order Inquiry and cancel the order with reason 51005: Unable to add testing to existing specimen.

Priority Add-On	Source Venous	Type Blood	Ordered by Natalie Wilson James, PA-C	Date/Time 3/15/2024 1459	Department WFMG PC SUMMER FAM
Expected Date 3/15/2024 - Approximate	Standing Status Future	Expiration Date 3/15/2025			

Diagnoses:
Elevated bilirubin - R17 [ICD-10-CM]

Questions

Order Question Release to patient: Send message to ordering provider if not resulted within 7 days of expected date

Answer Immediate

Select a specimen to add Bilirubin (Total, Direct, Indirect)

Select Suggested to provider CMP LIPID

6h old 3/15/2024 0846 Venous

Near expiration 24WIN-075C01164 In storage WIN CHEM MANUAL FRIDAY 2 Slot 13

Contacts

Natalie Wilson James, PA-C Authorizing Provider 336-643-7711 Work 336-643-3047 Fax WFMG PC SUMMER FAM Ordering Department 336-643-7711 Phone 336-643-3047 Fax

Order Inquiry

Refresh Views Current All Resulted Cancelled Fluids Release Collect Specimens Case Builder Cancel Add-on CC Results Link Orders Change Lab

T	Q.	S...	Order Date	Exp Col Date/Time	P	Specimens/HSC IDs	Order	Lab Status	CI	Authorizing Provider	Specimen Type
✓			03/15/2024	03/15/2024	+		Ferritin	Pending Add-On		Yuri M Cabeza, MD	Blood [3]
			03/15/2024	06/15/2024			Vitamin B12			Yuri M Cabeza, MD	Blood [3]
			03/15/2024	03/25/2024			Urinalysis with Reflex to Micros...			Yuri M Cabeza, MD	Urine [69]
			03/12/2024			24LC-072L05					Blood [3]
			02/12/2024	07/25/2024		737718196					Blood [3]
			02/12/2024	07/25/2024		737718195					Blood [3]
			02/12/2024	07/25/2024		737718194					Blood [3]
			05/19/2023			663724038, 2					

Cancel Tests For [REDACTED] Female 86 yrs, MRN: [REDACTED]

Order ID	Spec ID	Test Name	Status
✓ 693729023		FERRITIN	(Order St...

Requestor: MCHONE, TORIE L

Reason: Unable to Add On Tests to Existing Specin

Cancel selected tests? Yes No

Order Summary

FERRITIN

Patient: [REDACTED] Order: 693729023 MRN: [REDACTED] DOB: [REDACTED]

5. 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.

7. 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.

8. 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. Take the bag with packing list and label to the coag bench and let them know this is a shared specimen that needs to be pulled.
- c) Hematology tech will bring the specimen in the bag and hand off directly to Central Processing.

9. 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.

10. 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
Alleghany Lab	AH Alleghany Lab Add-Ons
Blood Bank Lab	AH Winston Blood Bank Add-Ons
Cancer Center Lab	AH Winston CC Lab Add-ons
Charlotte Core Lab (COR)	AH Core Lab Staff
Clemmons Medical Center Lab	AH Clemmons Lab Add-Ons
Cornerstone Westchester Lab	Cornerstone Lab Westchester Add-Ons
Davie Medical Center Lab	AH Davie Lab Add-Ons
Elkin Hematology Oncology Lab	AH Elkin Hem Onc Lab Add-Ons
Family Practice Lab (PPI)	AH WF Family Practice Lab Add-Ons
High Point Medical Center Lab	AH High Point Lab Lab Add-Ons
HLA Lab	AH WF HLA Lab Add-Ons
Lexington Hematology Oncology Lab	AH Lex Hem Onc Lab Add-Ons
Lexington Medical Center Lab	AH Lexington Lab Add-Ons
Micro Lab	AH Winston Micro/Serology Add-Ons
Mt Airy Hematology Oncology lab	AH Mt Airy Hem Onc Lab Add-Ons
REI Lab	AH WF REI Lab Add-Ons
Special Hematology Lab	AH Winston Special Heme Lab Add-Ons
Statesville Hematology Oncology Lab	AH Statesville Hem Onc Lab Add-Ons
Wilkes Medical Center Lab	AH Wilkes Lab Add-Ons

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

11. 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 server.
- b) Look up the patient in Beaker by name and DOB. Determine if an acceptable specimen is available to add the requested test(s).
- c) Click on the intended specimen and click on Specimen Update.
- d) Click on Add-ons drop down and select New Orders. Search and select correct order. Click Accept. Click Accept again in the Specimen Update window. The add-on is complete.
- e) 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
- iv. Initials of person completing the request

f) 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.

12. Add-on requests from Inpatient Phlebotomy

- a) If inpatient phlebotomy has a request to add a test to a specimen in Winston Lab, they will get authorization from the patient's nurse to add the test.
- b) Phlebotomy will complete the following slip of paper with the add-on test requested and the nurse's signature.
- c) Phlebotomy will send the completed form to CP in the tube station.
- d) Once CP completes the add-on, the form is filed in the Manual Requisitions folder for Client Services. (Use Specimen Update or Move Tests to Specimen to add the requested test.)
- e) Client services will scan the completed form to the patient's chart.

The image shows a yellow form with a black border. At the top left, there is a box containing the text "Patient Label". To the right of this box are three lines of text: "Date: _____", "Time: _____", and "Room: _____". Below these are four rows of text, each starting with a radio button icon: "Add-on Test: _____", "Credit Reason: _____", "Reschedule Reason: _____", and "Other Explain: _____". At the bottom of the form is a line for "Nurse Signature: _____".

Example Inpatient Phlebotomy Add-On Request Form

LITERATURE REFERENCES

None

RELATED PROCEDURES/POLICIES IN NAVEX

None

ATTACHMENTS/LINKED DOCUMENTS IN TITLE 21

Attachment A: Stability Reference – See Title 21

Attachment B: Cancer Center Add-Ons

Attachment C: Referral Testing Add-Ons

Attachment D: Beaker Panels and Included Tests

Attachment E: Forwarding Add-On Requests

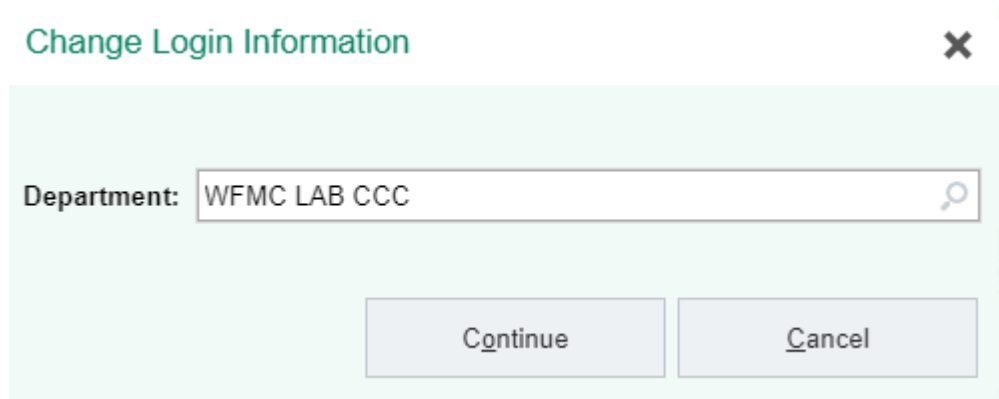
Attachment F: Outreach Add On Request Form – See Title 21

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:

- 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.
- WFMC LAB CCC** is the correct context for the CC Lab. You can search using “cancer lab” to find and select this context.

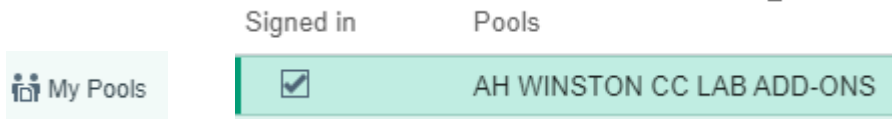


Change Login Information ✕

Department:

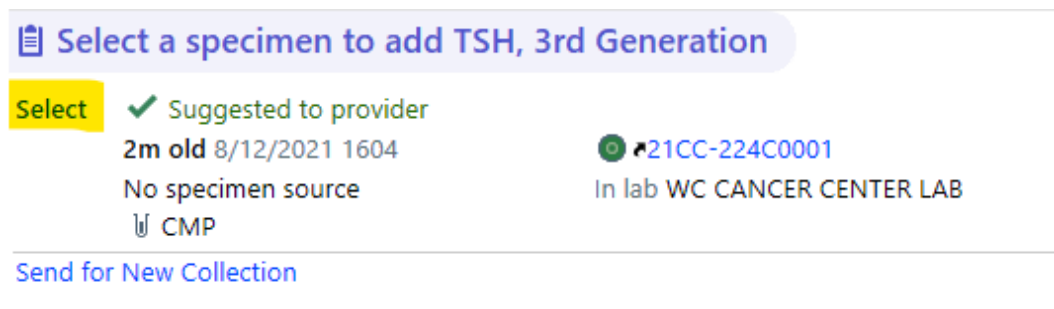
2. Open the Add-On In Basket and check that you are signed into the AH Winston CCLab Add-Ons pool:

- Click on My Pools. Make sure the box is checked for AH Winston CC Lab Add-Ons.



	Signed in	Pools
My Pools	<input checked="" type="checkbox"/>	AH WINSTON CC LAB ADD-ONS

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



[Select a specimen to add TSH, 3rd Generation](#)

[Select](#) ✓ Suggested to provider

2m old 8/12/2021 1604 21CC-224C0001

No specimen source In lab WC CANCER CENTER LAB

CMP

[Send for New Collection](#)

4. Change Context in Beaker back to the core lab context: **WFMC CLIN CORE LAB** is the correct core lab context.

Change Login Information




Department:

Continue

Cancel

5. Verify you are back in the Core Labs context by looking at the top left of the window. It should list **WFMC CLIN CORE LAB**.

 Encompass – WFMC CLIN CORE LAB – Production

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

Select Suggested to provider
41m old 8/13/2021 1747 21W-225CH3232
No specimen source In lab WC LAB
 CMP

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.

Specimen Inquiry: 21W-225CH2943
 Specimen Update Documents Labels Patient Inquiry Requisition Entry

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.”

Lab Status
Pending Add-On

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

Specimen Collection

The following orders have been flagged for add-on:
Comprehensive Metabolic Panel [601138201]

Would you like to continue collecting specimens?

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.

Attachment D: Beaker Panels and Included Tests

Panel	Included Tests
CMEP: Comprehensive Metabolic Panel, LAB17	Na, K, Cl, CO2, AGAP, BUN, GLU, CRT, eGFR, CA, TP, ALB, TBIL, ALP, AST, ALT
BMEP: Basic Metabolic Panel, LAB15	Na, K, Cl, CO2, AGAP, BUN, GLU, CRT, CA, eGFR
LFP: Liver Function Panel, LAB20	TP, ALB, TBIL, DBIL, ALP, AST, ALT
RFP: Renal Function Panel, LAB195	Na, K, Cl, CO2, AGAP, BUN, GLU, CA, PHOS, ALB, CRT, eGFR
Electrolyte Panel, LAB16	Na, K, Cl, CO2, AGAP
Lipid Panel, LAB18	CHOL, TRIG, HDL, LDL (calculated), Non-HDL
Lipid Panel with Reflex Direct LDL, LAB5076	CHOL, TRIG, HDL, LDL (calculated), Non-HDL, Direct LDL if indicated
Anemia Profile, LAB5117	Transferrin Iron Ferritin TIBC Transferrin Saturation
Hepatitis Profile, LAB5075	Hep B Surface Antibody Hep B Surface Antigen Hep B Core Total Hep C Antibody Hep A Total
Acute Hepatitis Screening Panel with Confirmation, LAB5583	Hep B Surface Antigen Hep B Core IgM Hep A IgM Hep C Antibody
Drug Screen, 7 Panel, Urine, LAB3126	Amphetamines Barbiturates Benzodiazepines Cocaine Fentanyl Opiates THC Creatinine
Drug Screen, 10 Panel, Urine, LAB5003	Amphetamines Barbiturates Benzodiazepines Buprenorphine Cocaine Fentanyl Methadone Opiates Oxycodone THC Creatinine

Attachment E: Forwarding Add-On Requests

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:

Done | + Add to Suggested Specimen | Send for New Collection | **Forward**

LDH
Patient: Buggy, Purple Order: 601070927 MRN: 6153134 DOB: 7/11/1992 Age/Sex: 28 yrs F

Priority	Source	Type	Ordered by	Date/Time	Department
Routine		Blood	Kimberly Ann Prazak, MT	4/20/2021 1016	DMCP2 01 ACE UNIT

Forwarded message
From: Kimberly Ann Prazak, MT
Specimen on way to mc lab

Select a specimen to add LDH

- ✓ Suggested to provider
 2h old 4/20/2021 1015
 No specimen source
 Amylase
- ⚠ In another lab
 2h old 4/20/2021 1015
 No specimen source
 BMP

Send for New Collection

Contacts

D101 D101-A Dmcp2 01 Ace Unit	336-998-2853 Phone
Chadwick David Miller, MD Attending Provider	336-713-9000 Work 336-716-5438 Fax
Ambulatory Attending Test Ser, MD Authorizing Provider	336-716-2011 Work 336-716-2011 Fax

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

Add-ons

↑ High ↓ Low | Dates

To: [Search icon] Cc

Subject

Insert SmartText | 100%

====View-only below this line====
----- Message -----
From: SYSTEM
Sent: 5/4/2022 11:34 AM EDT
To: Wc Lab Add-Ons

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

In Basket Recipients ✕

Individual Recipients

Pools

add

Classes

Search Results

%	Registry Name	Registry ID
<input type="checkbox"/>	AH ALLEGHANY LAB ADD-ONS	19350
<input type="checkbox"/>	AH CLEMMONS LAB ADD-ONS	1235100421
<input type="checkbox"/>	AH CMC LAB STAFF - CP ADD-ONS	1235100404
<input type="checkbox"/>	AH DAVIE LAB ADD-ONS	1235100423
<input type="checkbox"/>	AH ELKIN HEM ONC LAB ADD-ONS	1235100433
<input type="checkbox"/>	AH HAYWORTH CC LAB ADD-ONS	1235100425
<input type="checkbox"/>	AH HIGH POINT LAB ADD-ONS	1235100426

To Recipients

Cc Recipients

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

In Basket Recipients ✕

Individual Recipients

Pools

add

Classes

Search Results

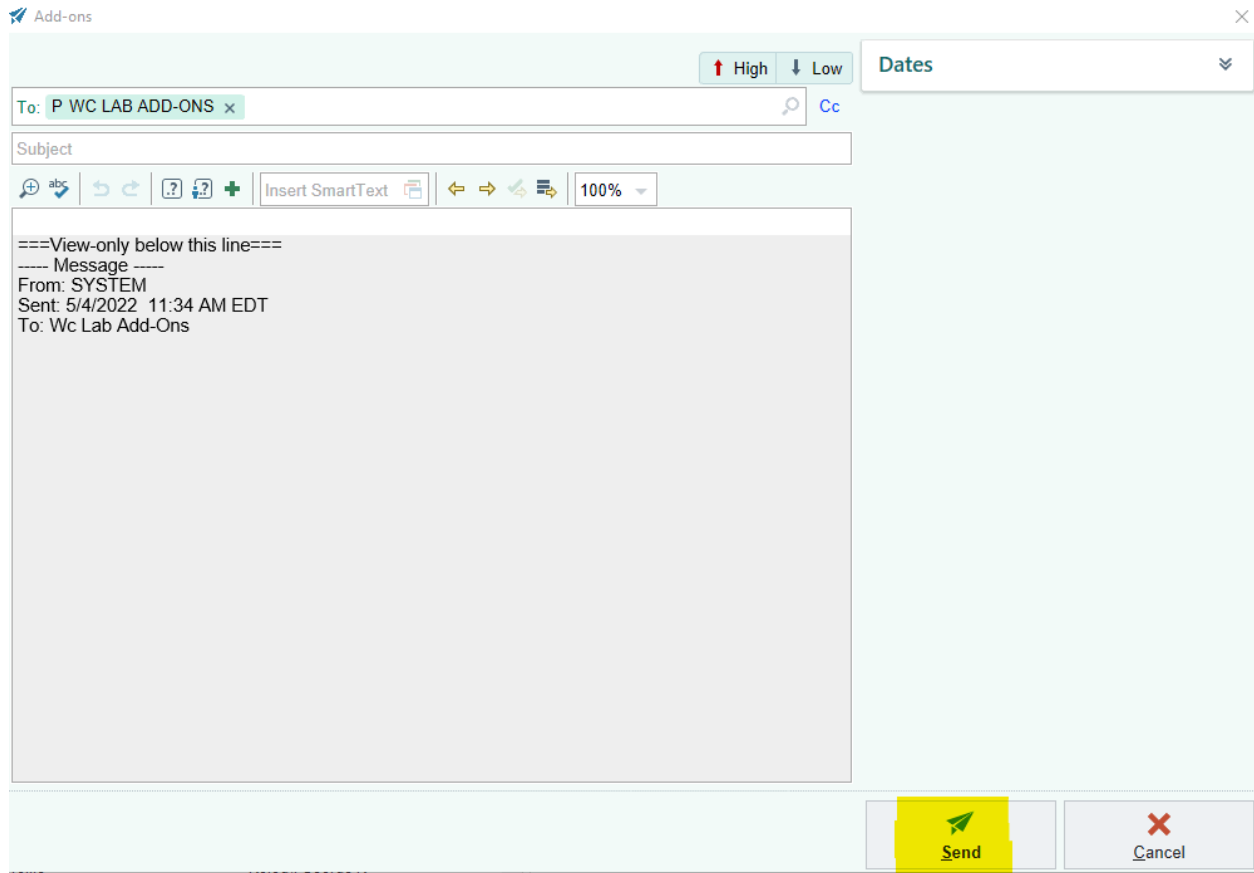
%	Registry Name	Registry ID
<input type="checkbox"/>	PEDIATRIC PREMIER ADD	12405
<input checked="" type="checkbox"/>	PEDIATRIC WESTCHESTER ADD	12406
<input type="checkbox"/>	CLEMMONS LAB ADD-ONS	12137
<input type="checkbox"/>	CORNERSTONE LAB WEST ADD-ONS	12409
<input type="checkbox"/>	CORNERSTONE LAB WESTCHESTER ADD-ONS	12410
<input type="checkbox"/>	DMC LAB ADD-ONS	11695
<input type="checkbox"/>	HPMC HAYWORTH CC ADD-ONS	13534

To Recipients

P	PEDIATRIC WESTCHESTER A...	12406
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Cc Recipients

6. Click Send in the next window:



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