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Owner	Carolyn Webb: Heme Technical Specialist
Area	BEAKER
Applicability	Community Physician

## BEAKER Transferring Specimens from One Performing Lab to a Different Performing Lab

### PURPOSE

This procedure provides instructions for how to transfer a specimen that would normally be tested at your lab to a different performing lab in the following circumstances:

- Analyzer is down and on-site backup is not available
- Kit testing reagent at your lab is expired and a new lot is not available
- Staffing issue resulting in inability to perform testing on site.
- An interfering substance is present for your test method that might not affect method at WDL
- Chemistry specimen requires extra dilutions or ultracentrifugation be performed at WDL
- Hematology specimen run on Sysmex analyzer that requires dilution or spun hematocrit

### POLICY

- A. Whenever possible, the specimen should remain within the community division.
- B. Use WDL for
  1. chemistry specimens that require extended manual dilutions,
  2. Interfering substance present and WDL uses a different test method [example: Coag samples that are lipemic, ultracentrifugation for lipemic chemistry samples and enzymatic creatinine testing for icteric samples (CP uses Jaffe creatinine)
  3. analyzer down-time backup if the nearest location to run the samples is WDL (example: Tosa)
  4. Hematology specimen run on Sysmex analyzer that requires dilution or spun hematocrit
- C. Never transfer proficiency samples to another lab.

# PROCEDURE

## I. Need is Known Before Specimen Collection

This process is useful when you know prior to specimen collection that the testing will need to be performed at a different location.

- A. Print the Beaker Clinical Pathology Tip Sheet "Changing the Performing Lab For a Test During Collection" from Attachments.
- B. Write the test name and performing lab on the tip sheet.
- C. Give the instructions to your phlebotomy team.
- D. When tip sheet instructions are followed, the performing lab is changed prior to specimen collection which results in the specimen properly routing to the alternate location.

## II. Changing Performing Location After Specimen is Received in Lab

Use this process to cancel and reorder the test if a specimen has already been received in the lab and the lab is unable to perform testing.

- A. Print Beaker Clinical Pathology Tip Sheet "Changing Performing Lab After Received" from Attachments. (Note this tip sheet is also known as "Updating In-House Test For Sendout Test")
- B. The Tip sheet will walk user through the
  1. redraw function,
  2. changing the performing location during recollection (Choose appropriate CP lab or WDL),
  3. updating the collection information to the original collection date/time/collector, and
  4. placing the specimen on the packing list (Use packing list appropriate for the performing location and specimen requirements of the performing lab.)
- C. Process the specimen based on requirements of the new performing lab. If an aliquot is needed, an aliquot label will print when the specimen is received in Beaker.
- D. Request a courier through MedSpeed's portal if needed.

## III. Chemistry samples that require additional testing at WDL

- A. Chemistry extended manual dilutions, ultracentrifugation, or alternate creatinine test are sent to WDL via a different process from other tests due to standardized sample requirements, reference ranges, and reporting units used across all Froedtert Roche Chemistry analyzers.
- B. Vitamin D and Hgb A1C greater than linearity will automatically reflex to WDL test.
  1. If Hgb A1C has interference that doesn't allow for result, use instructions in section II "Need is Known After Specimen is Received in Lab" section of this procedure.

# Chemistry Transfer Process 1

Use Chemistry Transfer Process 1 for the following scenarios:

- Extended Manual Dilution

This process is used to standardize reporting of patient results that exceed the upper limit of the analytical measurement range (AMR) where dilutions are not performed, or the upper limit of the clinically reportable range (CRR) where dilutions are performed. Values greater than the CRR are routinely reported as greater than (>) the upper limit. For a subset of Chemistry assays, Wisconsin Diagnostic Laboratories (WDL) has validated additional dilutions above the standard clinically reportable ranges defined at the Froedtert Community Physician Clinics and the Froedtert Community Hospitals. For this subset of assays, a preliminary result that is greater than the CRR will be referred to WDL for further dilution and final resulting. A current list of assays for which Wisconsin Diagnostic Laboratories has validated additional dilutions is attached to this policy.

**See Chemistry Transfer Process 2 for Vitamin D or Hgb A1C results that are above linearity.**

- Ultracentrifugation (lipemic sample)

WDL has capability to ultracentrifuge grossly lipemic samples prior to testing. CP does not have an ultracentrifuge.

- Icteric Interference on Creatinine

If CP Jaffe Creatinine result is flagged for ictericia, send specimen to WDL for enzymatic creatinine test.

A. In Result Entry, **preliminary verify** the results according to the scenario below:

1. Requires Extended Dilution: ">" result obtained at CP. Beaker will automatically attach the mnemonic BKR CP/CD DIL INT which expands to "*Specimen sent for dilution at Wisconsin Diagnostic Laboratories.*"
2. Requires Ultracentrifugation: DI removes result(s) triggering lipemia flag and adds a comment. Uncheck the Chart box for that component. **Prelim Verify** the rest of the results
3. Requires enzymatic Creatinine: DI removes creatinine result and adds a comment. Uncheck the Chart box for that component. **Prelim Verify** the rest of the results.

B. Complete the Chemistry Specimen Referral for Additional Dilutions form (see attached). Make a copy of the completed form to save for your records.

C. Create a packing list for the specimen. Dilutions must be on their own packing list.

1. Go to Packing List Editor
2. In the Packing List Lookup box, select Create New
3. Choose the appropriate WDL packing list for specimen transport requirements and click Create New.
4. The Packing List Editor will appear. Scan the sample ID. Click on the box in front of test name in the Tests to ship for accession box. The accession will not transfer properly if

the box is not checked.

Slot	ID	Tests	Priority
1	24WD-102HE0034.1	Complete Blood Count	Routine
2	24WD-102HE0034.2	Complete Blood Count	Routine

5. Enter a comment explaining why specimen is being sent
  6. Click Ready when packing list is complete. Retrieve the printed copy of the packing list.
  7. Click Picked Up and a second copy of the packing list will print. Attach this copy of packing list to your copy of the referral form and save for your records.
- D. Place aliquot of specimen in biohazard bag and dilution referral form in pocket of the biohazard bag.
  - E. Label the biohazard bag with "Deliver Directly to WDL Roche Bench".
  - F. Place the biohazard bag and packing list in transport bag with the specimen. Label package with appropriate MedSpeed label
  - G. Send specimen with routine courier pickup to WDL.

## Chemistry Transfer Process 2

Use Chemistry Transfer Process 2 for Vitamin D and Hemoglobin A1C above linearity

- A. Beaker will automatically order the WDL test for Vitamin D and Hemoglobin A1C when results are greater than linearity. Final verify the original result. (Note: WDL will not have access to verify your original result.)
- B. The WDL order will appear on the Sendout Bench - Specimens To Send Out. The accession number will be the same as the original accession number. Send primary tube for Hemoglobin A1C, Send an Aliquot for Vitamin D.
  1. Create an aliquot by going into Specimen update,
  2. click on the "More" button and choosing containers.
  3. Click "+ Aliquot" button and assign the second order to the aliquot.
  4. Click on Accept within the Containers window,
  5. Click on Accept at top left of Specimen Update window.
- C. Create a separate packing list for the above linearity samples.
  1. when adding an aliquot to packing list, ensure the ".2" accession number is the one put on the packing list. ".1" sample should be stored on site.
  2. Go to Packing List Editor
  3. In the Packing List Lookup box, select Create New
  4. Choose the appropriate WDL packing list for specimen transport requirements and click

Create New

5. Enter a comment explaining why specimen is being sent
  6. Click Ready when packing list is complete. Retrieve the printed copy of the packing list.
  7. Click Picked Up and a second copy of the packing list will print. Attach this copy of packing list to your copy of the referral form and save for your records.
- D. Place aliquot of specimen in biohazard bag and dilution referral form in pocket of the biohazard bag.
  - E. Label the Vitamin D biohazard bag with "Deliver Directly to WDL Roche Bench". Label the Hemoglobin A1C bag with "Deliver Directly to Hematology".
  - F. Place the biohazard bag and packing list in transport bag with the specimen. Label package with appropriate MedSpeed label
  - G. Send specimen with routine courier pickup to WDL.

## IV. Hematology Samples Require Additional Testing at WDL

A. This section only applies to samples run on Sysmex analyzers effective 3/19/25 at:

- Drexel Town Square Health Center
- Moorland Reserve Health Center
- North Hills Health Center
- Tosa Health Center
- Town Hall Health Center
- West Bend Health Center

B. Specimens will be sent to WDL for additional testing in the following situations:

- Spun HCT Needed for
  - ? Cryoglobulins present
  - Extreme Leukocytosis with MCHC>37.5
  - ? Physician requested
- Further Dilution Needed for Abnormal Retic Scattergram

C. Process for sending these samples to WDL

1. Select components that can be reported on current run and choose [Validate SEL] in Caresphere
2. Order a rerun in Caresphere through Action>Rerun
3. Complete the Hematology Specimen Referral Form (see attached). Make a copy of the completed form to save for your records.
4. Create a packing list for the specimen in Beaker. Referred samples must be on their own packing list.
  - a. Go to Packing List Editor

- b. In the Packing List Lookup box, select Create New
- c. Choose the appropriate WDL packing list for specimen transport requirements and click Create New. (Keep in mind ambient stability is 8 hours and refrigerated stability is 24 hours.)
- d. The Packing List Editor will appear. Scan the sample ID. Click on the box in front of test name in the Tests to ship for accession box. The accession will not transfer properly if the box is not checked.

Slot	ID	Tests	Priority
1	24WD-102HE0034	Complete Blood Count	Routine
2			

Tests to Ship for 24WD-102HE0034

☒ Complete Blood Count    On Test    24WD-102HE0034

Packing List Details

Comment

- e. Enter a comment explaining why specimen is being sent
- f. Click Ready when packing list is complete. Retrieve the printed copy of the packing list.
- g. Click Picked Up and a second copy of the packing list will print. Attach this copy of packing list to your copy of the referral form and save for your records.
- h. Place the specimen in biohazard bag and place referral form in pocket of the biohazard bag.
- i. Label the biohazard bag with "Deliver Directly to WDL Hematology Bench".
- j. Place the biohazard bag and packing list in transport bag with the specimen.
- k. Label package with appropriate MedSpeed label.
- l. Send specimen with routine courier pickup to WDL.

## SCOPE

This procedure applies to the following community division labs with Beaker go-live on 9/25/2021.

- Drexel Town Square Health Center
- Mequon Health Center
- Moorland Reserve Health Center
- North Hills Health Center
- Tosa Health Center
- Town Hall Health Center
- West Bend Health Center
- Calhoun Health Center
- Germantown Health Center
- Good Hope Health Center

- Greendale Health Center
- Hartford Health Center
- Jackson Health Center
- Kewaskum Health Center
- McKinley Health Center
- Pleasant Valley Health Center
- Sargeant Health Center
- Sussex Health Center

## DEFINITIONS

WDL = Wisconsin Diagnostic Laboratory

CP = Community Physician

CD = Community Division

CRR = Clinically Reportable Range. Reportable values taking into account the method's analytical measurement range and any dilutions that were performed.

## REFERENCE

Froedtert Chemistry Collaborative Team Meeting Minutes

Beaker project analyst recommendations

Beaker Tip Sheet for changing performing location at time of collection

## Attachments

- [!\[\]\(029651ce9ee64da8525b17c64e266edc\_img.jpg\) Changing Performing Lab After Received](#)
- [!\[\]\(05d3bfcaecedf25939aadd260bd34af7\_img.jpg\) Changing the performing lab in collection activity.pdf](#)
- [!\[\]\(310e475275728c8e1dc2a5c976e124f9\_img.jpg\) Chemistry Specimen Dilution Referral Form CP Sites 10-3-2024.docx](#)
- [!\[\]\(141928460a13e6dce55fa99596473bd7\_img.jpg\) Hematology Specimen Referral Form 3-19-2025.docx](#)
- [!\[\]\(b6a31d3dfa07e89bcef67dfa3d72ef92\_img.jpg\) Tests to be Sent to WDL for Manual Dilution CP CHD](#)
- [!\[\]\(1e2a17cf4cf6852fc082c4752ecc8314\_img.jpg\) Updating In-house test image](#)

## Approval Signatures

Step Description	Approver	Date
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CP Managers and Director	Emery Smith: Lab Manager	Pending
CP Managers and Director	Tina Bognar: CP Director	Pending
CP Managers and Director	Mary M Cypert: Lab Manager	Pending
CP Managers and Director	Karen Kunding: Lab Manager	03/2025
Policy Owner	Carolyn Webb: Heme Technical Specialist	03/2025

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## Applicability

Community Physician

## Standards

No standards are associated with this document

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