

**Stanton Territorial Hospital**P.O. Box 10, 550 Byrne Road
YELLOWKNIFE NT X1A 2N1**Document Number:** TMM20300**Version No:** 1.0

Page: 1 of 9

Distribution:**Transfusion Medicine Manual****Effective:** 09 November, 2017**Date Reviewed:** 09 November, 2017**Next Review:** 09 November, 2017**Document Name:**

Patient History Review

Approved By:

Jennifer G. Daley Bernier, A/ Manager, Laboratory Services

Status: **APPROVED****PURPOSE:**

This procedure outlines how a review of patient records for historical information should be performed.

POLICY:

- Prior to testing a patient specimen, a history check (review of records) shall be done and documented in the Laboratory Information System (LIS).
- Interpretations of current test results shall be compared with previous results.
- Previous admission records and/or previous patient history files alone shall **not** be used to determine a patient's ABO and Rh type for the purpose of red cell transfusions.
- Staff are required to review previous results, transfusions, history of pregnancy, difficulties in testing or other patient comments that may affect testing or products to be issued. Confirm at least three sets of unique patient demographics match for all historical records.
- Patient Records for Review may include:
 - Historical information on requisition
 - Historical results in LIS
 - Historical card files from pre-LIS implementation
 - Historical results in daily Blood Bank Patient Data Backup file
 - Antibody ID workup binders

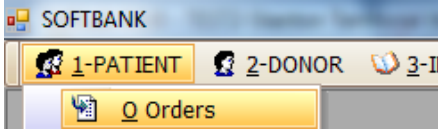
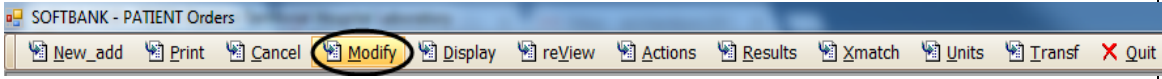
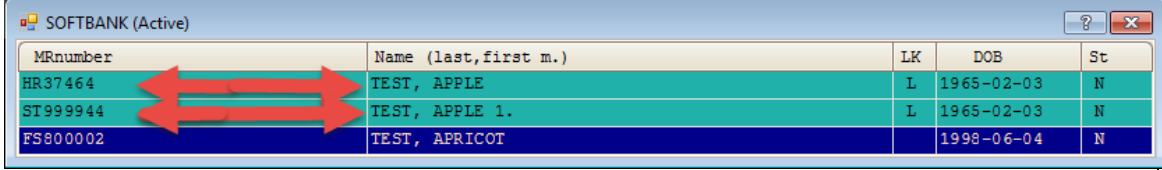
NOTE: This is a controlled document for internal use only. Any documents appearing in paper form are not controlled and should be checked against electronic version prior to use.

FILENAME: TMM20300.1PatientHistoryReviewPRO.docx

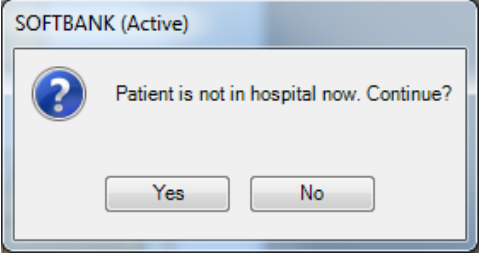
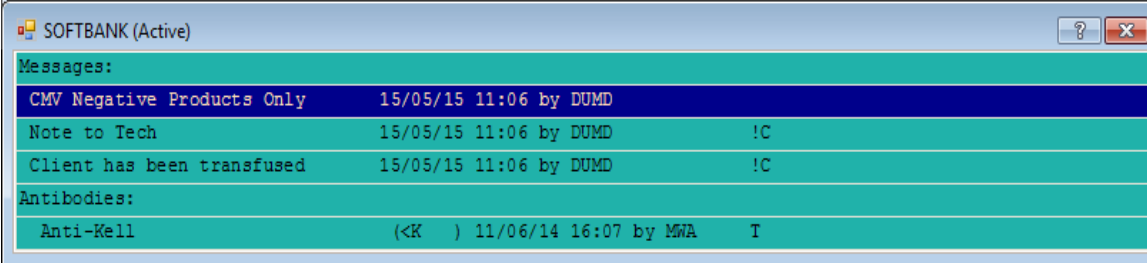
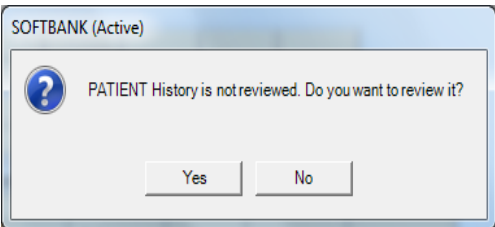
Print Date: 11/9/2017 3:37:00 PM

PROCEDURE INSTRUCTIONS:

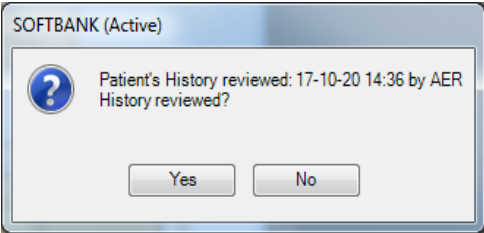
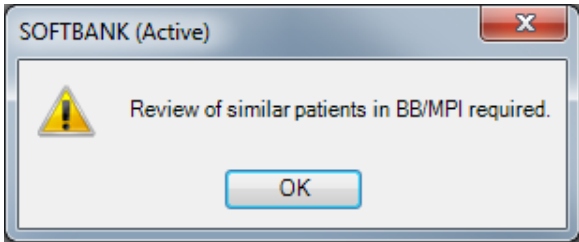
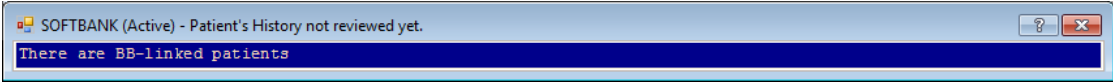
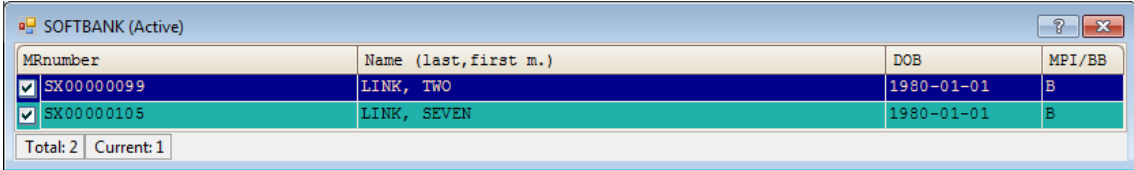
Follow the steps in the table below to review a patient history file.

Step	Action																				
HISTORY ON REQUISITION																					
1	<p>Check the patient history section on the requisition for information obtained from the patient; this may include a history from a hospital outside the NWT.</p> <p>Note: This section may not be 100% accurate as sometimes patients forget or do not know their whole history.</p>																				
LIS HISTORY CHECK																					
1	<p>In SoftBank click Patients > Orders</p> 																				
2	<p>Go to Modify</p> 																				
3	<p>Enter patients Last name (LN) and First name (FN) and hit F12-Accept</p>																				
4	<p>If the patient has more than one MRN in the NWT both will pop up.</p>  <table border="1" data-bbox="295 1081 1450 1249"> <thead> <tr> <th>MRnumber</th> <th>Name (last,first m.)</th> <th>LK</th> <th>DOB</th> <th>St</th> </tr> </thead> <tbody> <tr> <td>HR37464</td> <td>TEST, APPLE</td> <td>L</td> <td>1965-02-03</td> <td>N</td> </tr> <tr> <td>ST999944</td> <td>TEST, APPLE 1.</td> <td>L</td> <td>1965-02-03</td> <td>N</td> </tr> <tr> <td>FS800002</td> <td>TEST, APRICOT</td> <td></td> <td>1998-06-04</td> <td>N</td> </tr> </tbody> </table> <p>Example: Patient Name: Test, Apple – has two MRN in the LIS – One for Hay River and One at Stanton.</p> <p>If there are two or more different MRN (Client ID's) for the same patient (same name, same birthday) you must go into each to check the history. The LIS does not automatically link the two entries; so one could have information the other doesn't have.</p> <p>If multiple MRNs are found for a patient please link them using Procedure: TMM20400 Patient Linking in SoftBank</p> <p>If Patients are linked and shouldn't be (i.e. not the same patient) Please unlink patient using Procedure: TMM20500 Patient Un-linking in Soft Bank</p>	MRnumber	Name (last,first m.)	LK	DOB	St	HR37464	TEST, APPLE	L	1965-02-03	N	ST999944	TEST, APPLE 1.	L	1965-02-03	N	FS800002	TEST, APRICOT		1998-06-04	N
MRnumber	Name (last,first m.)	LK	DOB	St																	
HR37464	TEST, APPLE	L	1965-02-03	N																	
ST999944	TEST, APPLE 1.	L	1965-02-03	N																	
FS800002	TEST, APRICOT		1998-06-04	N																	
5	<p>To select the patient you want to view – double click on the line. Or highlight and press Enter-Select</p>																				

NOTE: This is a controlled document for internal use only. Any documents appearing in paper form are not controlled and should be checked against electronic version prior to use.

Step	Action	
	If:	Then:
6		Click – Yes to continue
7	<p>A History Box will appear for the patient.</p>  <p>Each line must be reviewed. If a comment is attached you will see the symbol !C. If patients are linked this box will have comments/antibody messages from both MRN's in the LIS for the patient.</p>	
8	Highlight the line and hit Enter to review the specific comment.	
9	To get out of the comment and go back to the History Box to review another hit: Esc	
10	Upon completion of the review of each line in the History Box hit Esc to exit	
11	Prior to accessing patient results, the LIS will need to record the history check. If the history check has not been recorded yet the following will occur:	
12	<p>Prior to accessing patient results, the LIS will need to record the history check. If none has been done yet you will get this popup</p> 	Click Yes

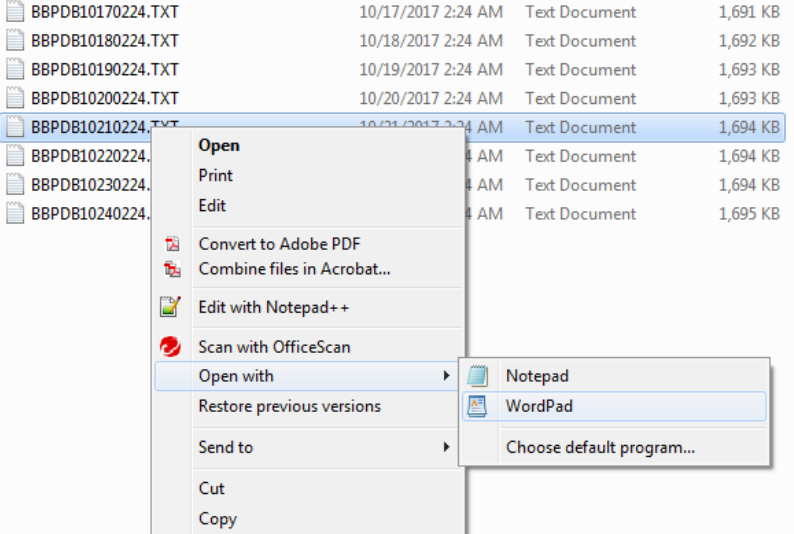

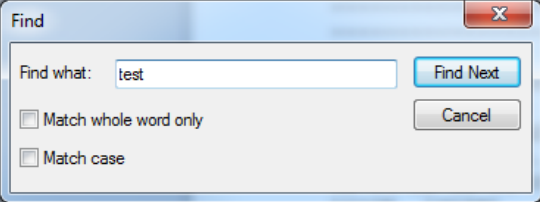
NOTE: This is a controlled document for internal use only. Any documents appearing in paper form are not controlled and should be checked against electronic version prior to use.

Step	Action													
13	The history box will pop up again for review													
14	Click F12-Review to record that the history was reviewed.													
15	If:	Then:												
16		Click Yes												
17	<p>If patients with two MRN's are linked you will need to do this history check for all patient entries</p>													
18	Double click on the highlighted line or hit F12 to review													
														
19	The linked patient list will appear. Highlight the patient you want to review first hit F8 and review – Follow Steps 7-14 again as needed to record the review													
	 <table border="1"> <thead> <tr> <th>MRnumber</th> <th>Name (last, first m.)</th> <th>DOB</th> <th>MPI/BB</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> SX0000099</td> <td>LINK, TWO</td> <td>1980-01-01</td> <td>B</td> </tr> <tr> <td><input checked="" type="checkbox"/> SX0000105</td> <td>LINK, SEVEN</td> <td>1980-01-01</td> <td>B</td> </tr> </tbody> </table> <p>Total: 2 Current: 1</p>		MRnumber	Name (last, first m.)	DOB	MPI/BB	<input checked="" type="checkbox"/> SX0000099	LINK, TWO	1980-01-01	B	<input checked="" type="checkbox"/> SX0000105	LINK, SEVEN	1980-01-01	B
MRnumber	Name (last, first m.)	DOB	MPI/BB											
<input checked="" type="checkbox"/> SX0000099	LINK, TWO	1980-01-01	B											
<input checked="" type="checkbox"/> SX0000105	LINK, SEVEN	1980-01-01	B											
CARD FILES														
	Check for previous patient history by searching card files by patient name. Filed by Last name.													
	If:	Then:												
1	A historical file is found and information is not in the LIS	<p>Record the pertinent patient information from the historical file into the LIS</p> <ul style="list-style-type: none"> Enter the historical Antibody ID to the Patient see Procedure: SBM20200 - Adding an Antibody to a Patient 												

NOTE: This is a controlled document for internal use only. Any documents appearing in paper form are not controlled and should be checked against electronic version prior to use.

Step	Action	
		<ul style="list-style-type: none"> • Enter historical phenotyping to the Patient see Procedure: *Adding an Antigen to a Patient • Enter any other pertinent information such as transfusion requirements (irradiated, CMV Neg, etc) as a patient special message or patient comment see Procedure: BLB92000 - Adding a Special Message to a Patient • Order CONF test on patient if required and result according to ABORh on file – See Procedure: ABO Confirmation Testing
	A historical file is found and information is in the LIS	Card can get a checkmark in the corner and filed in the entered into the LIS card file section
	If no card file is found	See Procedure: TMM20901 ABO Confirmation (Patient Retype) Testing
PATIENT DATA BACKUP FILE		
1	At Stanton Go to: S:\LAB\SCCBackup\SoftBank_408. At Inuvik Go to: L:\BloodbankBackupNew At Fort Smith Go to: C:\BloodBank At Hay River Go to: Local drive \\storea\userchares\SCCBackup - folder V408	
2	Choose file by date: BBPDB05150201.TXT = Blood Bank Patient Data Backup 05 (Month) 15 (Day) 0201 (Time)	
3	Right click on file and choose "Open With" and "Wordpad"	

NOTE: This is a controlled document for internal use only. Any documents appearing in paper form are not controlled and should be checked against electronic version prior to use.

Step	Action
	
4	<p>To search for a patient click on 1) Home then 2) Find and enter the patient name</p>  
5	<p>Click "Find Next" until you locate the patient for whom you are searching</p>
6	<p>Examine report for patient history – if patient has had Blood bank testing in any of the LIS linked labs it will show up in this report unless it was performed in the time since the last backup.</p> <p>Note: report will show if patient's have multiple MRN numbers (will show up as two entries – same name and DOB different MRN), Antibodies, messages</p> <pre> 17-10-22 02:24 Stanton Territorial Hospital Laboratory Page 1 PATIENTS DATA BACKUP REPORT - printed for date range from to 17-10-22 Last Specimen Last Cell Patient's last, first, middle MR# DOB ABO Rh Antibodies Messages Specimen Outdate Transfusion Transfusion Reactions -----</pre>

NOTE: This is a controlled document for internal use only. Any documents appearing in paper form are not controlled and should be checked against electronic version prior to use.

Step	Action
	TEST, CLINICS3 13-05-07 13-05-11 IX00000132 - - AB NEG EPABO
	TEST, SCCC - - SX00000068
	TEST, STANTON 17-05-23 17-05-27 SX00000002 - - 65-01-31 A POS MRG
	TESTC, CLINIC4 13-05-07 13-05-11 IX00000133 - - O POS
	TESTING, FORT SMITH 17-04-04 FX00000003 - - 00-01-01 O NEG
	TESTING, HAY RIVER 17-05-19 17-05-23 HX00000002 - - 51-10-01 O NEG
	TESTING, INUVIK 12-08-17 12-08-21 11-12-07 C HX00000004 - - O POS MRG
	TESTING, INUVIK 13-05-07 13-05-11 IX00000130 - - 60-08-23 A POS
	TESTING, STANTON 17-04-06 17-04-10 CS00000685 - - 00-01-01 AB POS <FyA
	TESTING, STANTON 16-08-26 16-08-30 SX00000381 - - O NEG PATD
	TESTING, STANTON 16-12-14 SX00000685 - - 00-01-01 O POS
	TESTING, STANTON FAX NUMBERS 12-10-02 12-10-10 HX00000001 - - A POS EPABO Note

ANTIBODY ID WORKUP BINDERS

1

If a patient has a history of an antibody or special testing was required due to any complication a review of the Antibody Investigation binders is required.

These binders may include:

- antibody exclusion workups
- antigen testing
- passive anti-D workups
- transfusion reaction investigations
- information on any other difficulties in testing

This information may assist in determining what testing is needed.

INTERPRETATION OF HISTORY

1

Consider the historical information in relation to current status/testing.

- "Will the history affect test results, the method I choose to test, or the products I can issue?"
- "Do the current results match the expected result? Why or Why not?"

Investigate any issue that could be a potential risk for the patient.

Examples:

- There is a history of an antibody - additional testing is required and extra time may be needed to obtain crossmatch compatible units.
- There is a significant history on pre-surgical patients; a 2 unit crossmatch may be needed if not previously ordered

NOTE: This is a controlled document for internal use only. Any documents appearing in paper form are not controlled and should be checked against electronic version prior to use.

Step	Action
	<ul style="list-style-type: none"> • Patient has a history of a different ABO/Rh: the discrepancy may be due to a misidentified sample, patient has had a Bone marrow transplant • Patient requires specialized products (CMV negative, etc) – units or products may need to be ordered from Canadian Blood Services • Patient has a history of a transfusion reaction- the ordering physician must be notified
2	If there is any difficulty in interpreting the historical results in reference to the current testing it must be resolved as soon as possible. Obtain assistance from MLT II or hematopathologist.

RELATED DOCUMENTS:

- BLB25100 - Patient Identification and Specimen Procurement for Blood Bank Samples
- BLB25200 – Blood Bank Specimen Acceptance and Rejection
- BLB92000 - Adding a Special Message to a Patient
- SBM20200 - Adding an Antibody to a Patient
- TMM20901 ABO Confirmation Testing
- Adding an Antigen to a Patient
- TMM20400 Patient Linking in SoftBank
- TMM20500 Patient Un-linking in SoftBank

REFERENCES:

1. Office of Provincial Director of Quality. Diagnostic Services of Manitoba. (2007). *Manitoba Transfusion Quality Manual for Blood Banks*
2. Health Canada. (May 2014). *Blood Regulations*.
3. Canadian Society of Transfusion Medicine. (April 2017). *Standards for Hospital Transfusion Services, Version 4*.
4. Canadian Standards Association. (February 2016). *Blood and Blood*

NOTE: This is a controlled document for internal use only. Any documents appearing in paper form are not controlled and should be checked against electronic version prior to use.

Components CAN/CSA-Z902-15.

- 5. SCC Soft Computer. (n.d.). *SoftBank II v25 Super User Training Manual*. SCC Soft Computer.

REVISION HISTORY:

REVISION	DATE	Description of Change	REQUESTED BY
1.0	07Feb11	Initial Release	C. Russell
2.0	09Nov17	Renumbered - Old number BLB20200; Updating Procedure, Amending Name	A. Richardson

NOTE: This is a controlled document for internal use only. Any documents appearing in paper form are not controlled and should be checked against electronic version prior to use.