



## TRAINING UPDATE

**Lab Location:** SGAH  
**Department:** Client Services

**Date Distributed:** 2/22/2013  
**Due Date:** 3/22/2013

### DESCRIPTION OF PROCEDURE REVISION

<b>Name of procedure:</b>
<b>Client Service Daily Activities SGAH.CS08.001</b> <b>SGAH Client Services Daily Duties Checklist AG.F153.001</b>
<b>Description of change(s):</b>
Section 5: Item A.8 - added frequency to check Item B.2 - revised instruction for PKU results Item C.1.i - added reference to addenda A Item C.3.c - added requirement to check patient restrooms Section 9: added A, revisions to B  <b>Daily Duties Checklist</b> revised to match SOP

Document your compliance with this training update by taking the quiz in the MTS system.

Approved draft for training (version 001)

Non-Technical SOP

<b>Title</b>	<b>Client Service Daily Activities</b>	
<b>Prepared by</b>	Samson Khandagale	Date: 11/9/2009
<b>Owner</b>	Samson Khandagale	Date: 11/9/2009

<b>Laboratory Approval</b>		
Print Name and Title	Signature	Date
<i>Refer to the electronic signature page for approval and approval dates.</i>		
Local Issue Date:		Local Effective Date:

<b>Review:</b>		
Print Name	Signature	Date

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**1. PURPOSE**

To describe the duties and tasks involved in working at the Client Service reception desk, with an emphasis on providing quality customer service to all clients.

**2. SCOPE**

This procedure applies Client Service and other staff when assigned to the reception desk.

**3. RESPONSIBILITY**

All staff assigned to this area must understand and perform these duties.

**4. DEFINITIONS**

None

**5. PROCEDURE**

A. Customer Service Duties:

1. Greet the general public, including patients, visitors, physicians, and other hospital personnel [that step into the laboratory](#).
2. Process orders:
  - a. Place orders in LIS (laboratory information system)
  - b. Contact physician’s office when there are questions concerning the lab tests to be ordered.
  - c. Use available resources when there are questions concerning the appropriate test to order:
    - 1) MIQ
    - 2) Quest Reference Manual
    - 3) Quest Diagnostics Website
    - 4) Supervisor
    - 5) Quest Diagnostics: Chantilly or Baltimore Client Services Departments as needed.

- d. Outpatients that require special collection by non-lab personnel are referred to the ED.
  3. Perform phlebotomy duties as per established procedure.
  4. Handle incoming telephone calls
    - a. Provide information about patient results, hours of operation, etc.
    - b. Print and fax results
    - c. Provide instructions for specimen collection
    - d. Transfer the phones when indicated
  5. Register All Out-reach patients according to procedure.
    - a. Have Admitting register patient
    - b. Place lab order in LIS.
    - c. Place on Call-back according to physician's request.
    - d. Confirm that the correct ordering Physician has been entered.
  6. Standing orders:
    - a. Standing orders are good for the time designated by the physician. When a physician is not time specific then it is good for 6 months.
      - 1) Before the standing order expires, inform the patient that they must bring an updated standing order with them on their next visit.
      - 2) When a patient presents themselves to the lab for a standing order that is expired, call the physician's office and request an updated standing order be faxed.
  7. Follow-up on any Verbal orders
    - a. Review the "Pending File" each day.
    - b. For any outstanding verbal orders, request written order per Verbal Orders procedure.
  8. Monitoring the Call List as per procedure.
    - a. Call list must be opened, refreshed and monitored at 15-30 minute intervals.
    - b. Results are faxed and/or called to the responsible medical provider.
    - c. All critical and culture results must be called according to established procedure.
- B. Reports**
1. Outpatient reports from LIS are to be handled according to procedure.
    - a. Outpatient Results print at 0550 daily
      - 1) Remove all addressed to 9901 Medical Center Drive.
      - 2) Place in envelopes by physician
      - 3) Give envelopes to the designated mail person to apply postage and mail.
    - b. New Activity After Discharge start to print at 2310
      - 1) Place reports in envelopes per Physician.
      - 2) Give envelopes to the designated mail person to apply postage and mail.
    - c. Before mailing reports to physician discard:
      - 1) Cancelled and/or credited results

2. Follow-up (call, fax and file) on Reference Lab Results
    - a. All critical and stat results are to be added to the LIS callback function, called to the appropriate medical provider and documented in the LIS. Fax a copy to the medical provider if requested.
    - b. All Outpatient results are mailed to the physician the morning after they are resulted.
    - c. [PKU results are mailed to the appropriate pediatricians.](#)
  3. Pathology Reports are handled by the Pathology department.
- C. Supplies/Maintenance
1. Stock supplies
    - a. O&P kits, Occult blood cards & instruction sheets
    - b. C&S urine kits & regular urine cups & instruction sheets
    - c. Gloves
    - d. 24 hours urine bottles, instruction sheets & preservatives
    - e. Pin-worm paddle kits & instruction sheets
    - f. Downtime forms: Central, Micro, Misc (fluid) & Cytology (green forms)
    - g. PHI forms
    - h. Toner and cartridges
    - i. Envelopes - [refer to Addenda A for steps to order envelopes](#)
    - j. Printer labels
    - k. Other office supplies
    - l. When supplies arrive, unpack and put away
  2. Maintain Equipment
    - a. Fax machine
    - b. Copy machine
    - c. Label Printer
    - d. Laser Printer
  3. Keep Front Desk work area clean at all times.
    - a. Wipe surfaces with Dispatch wipes.
    - b. Disinfect the phones
    - c. [Frequently check the patient restrooms and call Environmental Services department staff when service is needed or as requested by patients.](#)
- D. Miscellaneous
1. LIS functions
    - a. Function PHYMA
    - b. Update Doctor List as needed
    - c. Enter all of the physician demographic information
  2. Specimen processing procedures as assigned
  3. Communications File
    - a. All communications that need to be passed on to the next shift are to be placed in the Communications File.

- b. Each Front Desk staff person is to check the Communications File upon arrival for information needed to perform the duties for that day.

- 4. Other duties:
  - a. Go through the Outpatient Lab Orders File.

**6. RELATED DOCUMENTS**

Laboratory policies

- Telephone Courtesy Standards
- Call Handling

LIS procedures

- REI - Ordering Tests, Receiving Specimens, Reprinting Labels
- OER - Order Entry Review
- MIQ - Maintenance Inquiry Test Code Lookup
- PHYMA - Physician Maintenance

Client Service procedure manual

Phlebotomy procedure manual

Specimen Processing procedure manual

**7. REFERENCES**

N/A

**8. REVISION HISTORY**

Version	Date	Reason for Revision	Revised By	Approved By
		Supersedes SOP CS007.001		
000	2/18/2013	Section 5: Item A.8 - added frequency to check Item B.2 - revised instruction for PKU results Item C.1.i - added reference to addenda A Item C.3.c - added requirement to check patient restrooms Section 9: added A, revisions to B	L Barrett S Khandagale	S Khandagale

**9. ADDENDA AND APPENDICES**

- A. Envelope Ordering Process
- B. SGAH Client Services Daily Duties Checklist (see Attachment Tab of Infocard)

Form revised 3/31/00

## Addenda A

### Envelope Ordering Process

1. Go to website: Quest.cgconverge.com/login.aspx

**Note:** First time users must register with the website. You must have your Quest Diagnostics Log in information and Quest Diagnostics email address ready.

2. Once you have registered, log in and it will bring you to the homepage.

On the homepage, on the left hand side of the screen you will see a tab marked 'envelopes'. Click this tab.

The envelopes that will need to be ordered are item number:

(QUSE3- Quest Diagnostics EV #10 Window Envelope)

Click on this item and a new window will pop up with a prompt with the item details. It will ask you for the quantity you would like to order, you will need to order **1000**.

Once you have selected the correct amount, click on the tab at the bottom of the screen that states: Continue/personalize this item

3. When ordering the envelopes you must include a return address that will be printed on each envelope:

SGAH: 9901 Medical Center Dr  
Rockville, MD 20850

WAH: 7600 Carroll Ave  
Takoma Park, MD 20912

**Note:** After typing the return address once, you are able to save it for future use.

Once completed and the address is correct, there is a small box towards the bottom of the page that states –

'I have read the information stated above and approve this proof.' Click the box

Finally click on the Continue/Add to Basket tab

4. A window will pop up with 3 choices, **since we order 5000 envelopes at a time you will need to repeat this process 5 times**. The information is saved so simply verify the address is correct and then repeat the 'add to basket' until 5000 have been ordered.
5. After you have completed ordering 5000 envelopes, at the prompt where you had the choice to duplicate the item you must now select 'Go to Basket'.

At this screen you will need to verify:

- a. The correct shipping address, which is the same as your return address

- b. You will need to fill out the Check Requester Section  
Here you will need the following information:

Submitter Name: your name  
Submitter Phone #: Laboratory phone number  
BU: 67100 (this is the number **both** sites must use)  
Cost Center ID:  
WAH: 6713825  
SGAH: 6713850

- c. The next section you will need to enter the approvers email address:  
For both sites, Chantilly's purchasing department must approve the order for envelopes so there is only one email address that needs to be entered.

[Barbara.js.smith@questdiagnostics.com](mailto:Barbara.js.smith@questdiagnostics.com)

- d. Finally once all the information above has been verified and entered click on the '*I have read the information above*' tab, and next the '*place order*' tab.
6. Once you have successfully placed the order you will be sent to a screen with all of confirmation information. **Print this page** and keep on file incase you are having any issues with your order. Also you will be sent a confirmation email to your Quest Diagnostics email account, as well as an email when an order has been approved.



**SGAH CLIENT SERVICES DAILY DUTIES CHECKLIST**

**Instructions:** Checklist is to be completed on a daily basis. Staff is to work together by assigning duties among themselves or get assigned duties by Supervisor or Lead/Designee.

<b>Daily Duty</b>	<b>Time</b>	<b>Initials</b>
<input type="checkbox"/> Turn on lights. Check whole out patient lab area & rooms 1, 2, & 3. <input type="checkbox"/> Check fax machine for any Critical Value pending reports that need to be called. Check Tube system for reports. If found: Call the results. <input type="checkbox"/> Load Laser Printers & fax machine with paper <input type="checkbox"/> Record Room Temperature (weekly/monthly sign off due?) <input type="checkbox"/> Glucola expiry check. Water check. <input type="checkbox"/> Check Out Patient Restroom. Call House keeping if cleaning is needed. <input type="checkbox"/> Notify Supervisor/GL if any corrective action is required & document on Daily Duties Checklist/ QV form. <input type="checkbox"/> Clean phlebotomy chairs with dispatch wipes. Check waiting lounge. <input type="checkbox"/> Transfer phone forward to Front desk. <input type="checkbox"/> Tube system working? If not, call Plant Operations Rep/ Electrician & record work order reference number ticket number on this checklist.	0630- 0700	
<b>Attend Callback in LIS</b>	0645	
(1)* Collect & begin mail out of outpatient reports.		
<b>Open Door to Outpatient Lab</b>	0700	
Print Pending Log for Outpatient Lab (SCS) & OPD 9715 (SOL): Resolve log. Initial it & date it. File in Daily Requisitions folder.	0715	
(2)* Complete Daily Requisition Audit/Confirm second checks are being made.	0930	
(3)* Follow-up (call, fax and file) on results faxed from Chantilly.		
Review Standing Orders & find test codes in advance.		
Review Patient Returning Folder & Scheduler for Sweat & GTT/other tests		
<b>Callback list &amp; manual call log review</b>	0945	
(5)* Stock supplies, check for expiry & Clean Outpatient areas		
Office Supplies & Iron Mountain off site shipment if applicable.		
<b>Callback list &amp; manual call log review</b>	1015 - 1045	
(6)* Check Patient Waiting Lounge, Patient Rooms & Restroom.		
<b>Callback list &amp; manual call log review</b>	1115	
Prepare Iron mountain boxes.	1100-1130	
<b>Callback list &amp; manual call log review</b>	1145	
(2)* Daily Requisition Audit: Document on Manual log	1200	
<b>Callback list &amp; manual call log review</b>	1215 - 1245	
(2)* Daily Requisition Audit: Document on Manual log	1300	
<b>Callback list &amp; manual call log review</b>	1315 - 1445	
Put up sign not to use Tube System until next AM.	1445	
(2)* Daily Requisition Audit: Document on Manual log	1500	
Print Pending Log for Outpatient Lab (SCS) & OPD 9715 (SOL): Resolve log. Initial it & date it. File in Daily Requisitions folder.	1500	
<b>Change of shift: Given over to _____ by _____</b>		
<b>Callback list &amp; manual call log review</b>	1515 - 1545	
(6)* Cleaning/ Disinfecting desk area: Clean up the front desk & Patient Waiting Lounge: Once during shift or as needed.		

<b>Callback list &amp; manual call log review</b>	1615 - 1645	
(2)* Daily Requisition Audit: Document on Manual log	1700	
Order all Adventist Behavioral Health Orders in LIS. Get second staff to double check & sign requisitions.	1715	
<b>Callback list &amp; manual call log review</b>	1730 - 1815	
(2)* Daily Requisition Audit: Document on Manual log	1830	
<b>Callback list &amp; manual call log review</b>	1845	
(7)* Cleaning/ disinfecting: Phlebotomy out patient rooms		
Print Pending Log for Outpatient Lab (SCS) & OPD 9715 (SOL): check, sign off & keep in Daily Requisitions folder.	1900	
Check waiting lounge: tidy up for next AM.	1900	
Transfer Phone to X 6358. Insert paper in fax machine & printers.		
Handover Pending/Unsuccessful Callback information to Sp. Processor/Lead Tech for follow-up.	1900	

\* see below for description of duty

(1) **Outpatient reports from LIS**

Outpatient Results - Remove all addressed to 9901 Medical Center Drive. Place in envelopes by physician & mail.

(2) **Daily Requisition Audit:** After every 7-8 requisitions check requisitions by sign face sheets/ reqs & record on sheet. Refer to SOP Validation of Outpatient Orders for details

(3) **Follow-up (call, fax and file) on results faxed from Chantilly**

- call / fax and document
- File documentation

Other reference lab results – copy/file in the Non- Interfaced folders. By name Mail original to Dr's office.

(4) **New Activity after Discharge start to print at 2315 -**

- Mail out

(5) **Stock supplies.**

- |   |   |
|---|---|
| <input type="checkbox"/> O&P kits, Occult blood cards & instruction sheets          | <input type="checkbox"/> Pin-worm paddle kits & instruction sheets                |
| <input type="checkbox"/> 24 hours urine bottles, instruction sheets & preservatives | <input type="checkbox"/> PHI forms  |
| <input type="checkbox"/> Toner and cartridges                                       | <input type="checkbox"/> C&S urine kits & regular urine cups & instruction sheets |
| <input type="checkbox"/> Envelopes- refer to SOP                                    | <input type="checkbox"/> Printer labels   |
| <input type="checkbox"/> Gloves & Red bio-bags                                      |   |
| <input type="checkbox"/> Other office supplies                                      |   |

(6) **Check/ Disinfecting desk area:** Clean up the front desk & Patient Waiting Lounge: Once during shift or as needed.

- Wipe surfaces with Dispatch
- Clean the phones
- Fill the printers with paper according to Print Schedule 10 minutes ahead of print time.
- Call Environmental Services department as service is needed.

(7) **Check/ disinfecting:** Phlebotomy out patient rooms

- Clean collection Phlebotomy chairs, side tables & baby drawing station with Dispatch.
- Stock area with supplies needed for Phlebotomy procedures.

Comments: \_\_\_\_\_  
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\_\_\_\_\_ Add a sheet for additional comments

Lead Tech/ Designee signature: \_\_\_\_\_ Date & Time \_\_\_\_\_