

TRAINING UPDATE

Lab Location: WAH
Department: Client Service

Date Distributed: 1/5/2015
Due Date: 2/1/2015
Implementation: 2/2/2015

DESCRIPTION OF PROCEDURE REVISION

Name of procedure:
Client Service Daily Activities WAH.CS08 v2 WAH Client Services Daily Duties Checklist AG.F216.1
Description of change(s):
Section 5: Item B.1 – delete discontinued printing and update to fax reports Item C – update supply list Section 6: update SOP titles Section 9: update approver email Update checklist to match SOP This revised SOP and form will be implemented on February 2, 2015

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

Approved draft for training (version 2)

Non-Technical SOP

Title	Client Service Daily Activities	
Prepared by	Leslie Barrett	Date: 8/25/2009
Owner	Samson Khandagale	Date: 8/25/2009

Laboratory Approval		
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:

Review:		
Print Name	Signature	Date

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1. PURPOSE

This procedure describes 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 Specimen Processing staff when assigned to the reception desk.

3. RESPONSIBILITY

Client Service and Specimen Processing staff must understand and perform these duties.

4. DEFINITIONS

None

5. PROCEDURE

A. Customer Service Functions

1. Meet and greet the general public, including patients, visitors, physicians, and other hospital personnel.
2. Process outpatient 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 way to order the tests:
 - 1) MIQ
 - 2) Quest Reference Manual
 - 3) Co-workers/techs in the core lab
 - 4) Supervisor

- 5) Quest diagnostics website
 - 6) Quest Diagnostics: Chantilly or Baltimore Client Services Departments as needed.
3. Perform phlebotomy duties according to procedures.
 4. Handle incoming telephone calls using appropriate courtesy standards.
 - 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 Adventist Home Health patients
 - a. Fax to admitting for registration
 - b. Enter into lab computer system
 - c. Order tests
 - d. Ensure the results are called, printed, and faxed to the physician and Adventist Home Health
 - e. Ensure the physician information is entered into the computer.
 6. Standing orders:
 - a. The **Standing Order file** is kept up to date.
 - b. Standing orders are good for **six months** from the date on the order (not the date the patient presents for the service.)
 - 1) Pull the standing orders that are about to expire
 - 2) Call the physician office and have the office fax a new standing order that will be good for six months.
 7. Follow-up on any Verbal orders
 - a. Review the "Pending File" each day.
 - b. For any outstanding verbal orders, request written order per procedure Verbal Orders.
 8. Monitor the label printer for **STAT specimens** that need to be collected by the phlebotomist.
 - a. Before paging the phlebotomist, check **OER** in **LIS function Laboratory Inquiry** to ensure the order is not a duplicate.
 - b. Page the phlebotomist and document on the Phlebotomy **STAT Page Log**.
 9. Monitoring the Call List
 - a. Must be monitored hourly
 - b. Results are faxed and called to the physician office
 - c. Positive cultures on in-house patients will be called to the nursing unit and documented in LIS and on the hard-copy/fax copy.

B. Reports

1. Outpatient reports from LIS

- a. Outpatient Results print daily in the early morning for location **WALAB**.
 - 1) **FAX these results to physician's offices either via LIS function Laboratory Inquiry or manually. See SOP Laboratory Inquiry for Result Lookup, Printing and Faxing results for more details.**
 - ~~Separate Carroll and Maple Ave.~~
 - ~~2) Place in envelopes by physician~~
 - ~~3) Must be ready for the transporter by 1000.~~
- b. ~~New Activity After Discharge start to print at 0950~~ **Process discontinued**
 - ~~1) Reviewed by supervisor or lead tech for adverse results. Refer to the Laboratory policy Adverse Results on Discharged Patients for details.~~
 - 2) Place in envelopes by physician for mailing in the out-going rack to be taken to Chantilly by courier service rep**
- c. ~~Ensure the following reports are discarded before alphabetizing by physician for mailing:~~
 - ~~1) Blood Bank Results~~
 - ~~2) Respiratory Results (Pulse Oximetry, etc)~~
 - ~~3) POCT (Point of Care Testing) results~~
 - ~~4) Cancelled and/or credited results~~
- d. ~~Health Information Management (HIM) reports print at 0855~~ **discontinued**
 - ~~1) The results are printed on **Red Lined Paper**~~
 - ~~2) Check the report at the end and pull out the reports that have been printed before.~~
 - ~~3) Put the rest of the report for HIM together.~~
 - ~~4) Call the transporter (ext. 5175) to deliver the reports to the HIM department.~~
 - 5) Place the end report in the cumulative report notebook.**

2. Follow-up (call, fax and file) on results faxed from Chantilly

- a. If the result is on an in-patient, call the nursing unit. Fax the report to the nursing unit
- b. If the result is on an outpatient, call the doctor's office, then fax **mail** a copy to the doctor's office
- c. Document the date, time, and your initials on the back of the result and file. (Documentation retained a minimum of 2 years).
- d. Results sent from other reference labs, ie. **LipoScience, Md. Dept. of Health, and Atherotech**, are copied for Laboratory records and filed in the Non-Interfaced folders according to last names in the filing cabinet. Mail original to the doctor's office. **See Newborn Metabolic Screening SOP for more information.**

3. Pathology Reports are handled by the Pathology department.

C. Equipment/Supplies/Maintenance

1. Stock and maintain supplies
 - a. O&P kits, Occult blood cards and instruction sheets

- b. C&S urine kits & regular urine cups and instruction sheets
- c. **Copy** Paper: ~~copy and HIM (Red striped paper)~~
- d. Gloves and Red bio-bags.
- e. 24 hours urine bottles, instruction sheets and preservatives
- f. Pin-worm paddle kits & instruction sheets
- g. Downtime forms: Central, Micro, **Misc (fluid)** and Cytology (green forms)
- h. PHI forms
- i. Toner and cartridges
- j. Envelopes - refer to Addenda A for steps to order envelopes
- k. Printer labels
- l. Other office supplies
- m. When supplies arrive, unpack and put away

2. Maintain Equipment

- a. Fax machine
- b. Copy machine
- c. Label Printer
- d. Printer

3. Clean up the front desk, Phlebotomy Rooms and Patient Waiting Lounge at the beginning and the end of each shift

- a. Wipe surfaces with Dispatch
- b. Clean the phones
- c. Stock the front desk area with:
 - 1) Urine cups and clean catch kits
 - 2) 24 hour urine containers
 - 3) **O&P stool kits**
- d. Fill the printers with the appropriate paper according to Print Schedule 10 minutes ahead of print time.
- e. Clean collection Phlebotomy chairs, side tables and baby drawing station with 'Dispatch- hospital disinfectant'.
- f. Stock area with supplies needed for Phlebotomy procedures.
- g. Call Environmental Services department when service is needed.

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
 - a. Receive routine and stat specimens
 - b. Process and send out reference lab specimens
 - c. Centrifuge and distribute specimens to the appropriate area in the lab.
 - d. Use the tube system
3. Use the **CERNER hospital computer system**
 - a. Check patient demographic information

b. Baby name changes with assistance from lead staff or Supervisor.

4. Communication and Shift logs

Communicate pending work verbally and via Daily Duties Checklist to the staff of the next shift. Second shift will communicate with Core lab lead tech and Specimen Processing staff.

5. Other duties:

- a. Perform daily Audit, document if test is missed and write a QV form
- b. Review 'Patient Returning Folder'
- c. Review 'Drs faxed orders folder'
- d. Check Glucola bottles for expiry dates and re-stock as needed.
Note: Temperature check for the Glucola refrigerator is **not** required.
- e. Tube storage temperature checks, report any problems and follow up on the form.
- f. Assist with ordering supplies
- g. Escort/direct patient to handicap patient restroom if requested.
- h. Report overfilled sharps containers or safety hazards.

E. Daily Duties Checklist

1. List must be completed daily.
2. Staff is expected to work together by assigning duties among themselves or get assigned duties by Supervisor or Lead/Designee.
3. Specific times or time intervals for certain tasks are designated on the checklist.

6. **RELATED DOCUMENTS**

Laboratory policies

- Telephone Courtesy Standards
- Call Handling

~~• Notification of Significant Adverse Results on Discharged Patients~~

LIS procedures

- Order Entry
- Laboratory Inquiry for Result Lookup, Printing and Faxing
- ~~• REI - Ordering Tests, Receiving Specimens, Reprinting Labels~~
- ~~• OER - Order Entry Review for Receipt of Floor Collected Specimens~~
- MIQ 1 - Maintenance Inquiry, Test Code Lookup
- PHYMA - Physician Maintenance

Client Service procedure manual

Phlebotomy procedure manual

Specimen Processing procedure manual

WAH Client Services Daily Duties Checklist (AG.F216)

7. **REFERENCES**

N/A

8. REVISION HISTORY

Version	Date	Reason for Revision	Revised By	Approved By
		Supersedes SOP CS001.001		
000	9/30/2012	Section 5: Item C.j - added reference to addenda A Item D.5 - added daily audit, check of Glucola bottles, removed temperature check for Glucola refrigerator, added Tube storage temperature checks. Section 9: added A, revisions to B	N Maskare, S Khandagale	SKhandagale
001	12/18/2014	Section 5: Item B.1 – delete discontinued printing and update to fax reports Item C – update supply list Section 6: update SOP titles Section 9: update approver email Footer: version # leading zero’s dropped due to new EDCS in use as of 10/7/13	N Maskare, S Khandagale	SKhandagale

9. ADDENDA AND APPENDICES

A. Envelope Ordering Process

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.

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- 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.

WAH CLIENT SERVICES DAILY DUTIES CHECKLIST

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

Daily Duty	Time	Initials
Check fax machine for Critical Value/Micro. Reports. Check STAT & Routine printers: Notify Phlebotomy if there is a STAT order. Check for status on label rolls in the printers. Laser Printers - for paper & patient reports. Room Temperature Recording. Glucola expiry check & Stock-up. Notify Supervisor/GL if corrective action is required.	0630	
Turn on lights. Patient waiting lounge & rest room. Transfer phone back to desk. Clean & disinfect Patient Rooms & Desk area. Restock as needed. Receive floor division & pager list from Phlebotomy. Phlebotomy staff will be paged through the day within 2-3 minutes of STAT order & a STAT call log maintained.	0640	
Open window/shutter for service. Turn TV on for patients. Pull QA report and review/call Critical Values. Save in Daily Folder. Callback: Review & Call	0645	
(1)* Fax out patient Reports to physician's offices.		
Outpatient rooms cleaned with disinfectant & stocked up?		
Pull QA report and review/call Critical Values. Save in Daily Folder. Callback: Review & Call	0745	
Pull QA report and review/call Critical Values. Save in Daily Folder. Callback: Review & Call	0845	
(2)*Follow-up (call, fax and file) on results faxed from Chantilly	0855	
Standing orders valid? Calls made for updated SO's?	0900	
(3)* Daily Requisition Audit: Complete for previous day, document on Manual log	0915	
Review 'Patient Returning Folder' & Drs faxed orders folder'		
(4)* Stock supplies- Notify Supervisor/GL of status & if inadequate quantity is noted.	0930	
Office Supplies & Iron Mountain off site shipment if applicable.		
(3)* Daily Requisition Audit: Document on Manual log	0945	
Pull QA report and review/call Critical Values. Save in Daily Folder. Callback: Review & Call	0950	
(5)* Check Patient Waiting Lounge & Phlebotomy out patient rooms.	0955	
Courier Pick-up/ Iron Mountain pick-up occurred? N/A _____	1000 - 1030	
QD mail by Courier Service sorted & distributed (in absence of Admin assistant)		
Pull QA report and review/call Critical Values. Save in Daily Folder. Callback: Review & Call	1045	
(3)* Daily Requisition Audit: Document on Manual log	1100	
Callback: Review & Call		
Pull QA report and review/call Critical Values. Save in Daily Folder. Callback: Review & Call	1145	
NMS & Miscellaneous send-out reports	1200	
Pull QA report and review/call Critical Values. Save in Daily Folder. Callback: Review & Call	1245	
Pull QA report and review/call Critical Values. Save in Daily Folder. Callback: Review & Call	1345	
(6)*Cleaning/ Restocking/Disinfecting desk area: Clean up the front desk & Patient lounge. Check rest room specimen window.	1315	
Pull QA report and review/call Critical Values. Save in Daily Folder. Callback: Review & Call	1445	
(3)*Daily Requisition Audit: Document on Manual log Check waiting lounge- tidy up, turn off TV & lights.	1545-1600	

