

TRAINING UPDATE

Lab Location: GEC, SGAH & WAH
Department: QA

Date Distributed: 4/23/2015
Due Date: 4/30/2015
Implementation: 4/27/2015

DESCRIPTION OF PROCEDURE REVISION

Name of procedure:
Proficiency Test Order Entry GEC / SGAH / WAH.QA28v2
Description of change(s):
<p>Section 1: Clarify purpose Section 3: Update job position Section 4: Add definitions CAP, LIS, REI, MIQ1 Section 5: Add sections A, B, and C. Section 5.D: Add details for Batch Hospital ID entry. Add note for determining test codes. Section 5.E.2: Add comment about hyphens, revised 'first' name to the CAP sample letters and sample number, removed specific birthdate. Update screen shots Section 5.F: Remove reprinting labels and dry-erase board step. Add notification of survey orders and sample locations. Section 6: Add LIS procedures and lab policy</p> <p>This revised SOP will be implemented on April 27, 2015</p>

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	Proficiency Test Order Entry	
Prepared by	Leslie Barrett	Date: 10/20/2009
Owner	Cynthia Bowman-Gholston	Date: 10/20/2009

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 outlines the process to order testing on proficiency survey samples.

2. SCOPE

This procedure applies to QA and designees.

3. RESPONSIBILITY

QA personnel or designees are responsible for performing this procedure.
The Senior QA Specialist is responsible for the content and review of this procedure.

4. DEFINITIONS

<cr>: carriage return, or press enter on the keyboard
CAP: College of American Pathologists, the proficiency survey provider
LIS: The Laboratory Information System (Sunquest)
REI: Interfaced Requisition Entry, a function of the Sunquest system
MIQ1: Test code lookup function of the Sunquest system

5. PROCEDURE

A. Examine the CAP Survey materials and consider the site to determine the appropriate test orders for the site.

Note: The following surveys are excluded from the ordering process.

 Euate (ELU)
 Red Blood Cell Antigen Testing (RBCAT)

B. Locate and open the CAP Survey spreadsheet on the Quest Diagnostics G Drive:

G:\AHC_Lab\Quality Assurance\Proficiency Testing\CAP Year\
Open the site-specific spreadsheet for LIS orders.

Each survey has a separate tab; open the tab corresponding to the survey being ordered. The survey spreadsheet contains a historical listing of all past surveys and the associated ordering test codes. This information will be entered when prompted for BATCH TEST in section D.

C. Log in to the LIS (Sunquest) on an Adventist Healthcare computer:

1. Select the LAB1 icon from the computer desktop
2. At the Log in: **ALAB**
3. DEVICE LOC: Enter a device location according to the site as indicated below.
Note: Labels queue to the printer at the specified location.
 - Enter **GL1** to order CAP survey samples for site GEC
 - Enter **SCS** to order CAP survey samples for site SGMC
 - Enter **WCS** to order CAP survey samples for site WAH
4. ACCESS CODE: Enter your Sunquest user name
5. PASSWORD: Enter your Sunquest password

D. Use Batch order entry to begin to place orders

FUNCTION: **REI**
BATCH HOSPITAL ID: **<cr>** (to accept default location), **OR**

Type another hospital ID
The correct hospital site (DEVICE LOC) must be entered to ensure the samples appear on the specified laboratory's pending log (see device locations in C.3).

- SGAH for Shady Grove Medical Center or Germantown Emergency Center
- WAH for Washington Adventist Hospital

BATCH COLL DATE: **T** (for today) or date the survey was received
BATCH COLL TIME: **-5**

BATCH REC. DATE: **T** (for Today)
BATCH REC. TIME: **N** (for Now)

SPEC BILL (Y/N): **<cr>**

COPY TO PHYS (Y/<N>) : **<cr>** (to accept default)

PHLEB. CODE: **<cr>**
PHLEB. WORKLOAD: **<cr>**

BATCH TEST-1: enter a test code, <cr>

Note: Consult the CAP Survey spreadsheet from section B for test codes, if needed. For any new surveys, look up the test codes using the Sunquest Function MIQ1. See the procedure MIQ1-Maintenance Inquiry Test Code Lookup.

BATCH TEST-2: enter second test code, repeat until all codes are entered.

(When necessary, surveys may be advance ordered to streamline the workflow.)

E. Create a ‘patient’ for each CAP sample

1. Patient Access screen displays with Lookup Mode defaulted to ‘Name’
Within the field, enter an ‘up arrow’ (↑) to move change to lookup mode, enter ‘H’ followed by a <cr> to change to Hosp. No. inquiry

HOSP. NO: Type ‘CAP-’ (CAP hyphen), press ENTER

2. The LAB ADMINISTRATIVE ENTRY screen appears. Input data as described below.

PATIENT NAME: use the following format to enter:

Last name: **CAP <cr>**

First name: **Survey Specimen Name + vial # <cr>**

Examples: CAP, MRS-01
 CAP, APT-02
 CAP, VR4-06
 CAP, FH6-11

Exception: survey J, which includes serum and cells, use format
CAP, J-01 R/S (cells & serum)

BIRTHDATE/AGE: enter a birthdate (mmddyyyy) or enter a numeric age, i.e.17

SEX: **M (or F) <cr>**

AKA NAME: **<cr>**

SSN: **<cr>**

3. The system will assign the next sequential hospital number and display a summary screen of the information entered above.

Be certain the correct hospital is indicated for the survey.

If all data is correct, Type “A” < cr> to accept the data.

(Figure 1: Proper format for sample name)

See example below

Example of data entry for **Start/Admit Date** and **Physician**:

LAB EVENT ADMINISTRATIVE ENTRY

HOSP. ID: SGAH

HOSP. NO.: CAP-1 CAP, AL2-05

LOCATION: CAP

ACCOUNT NO.: 99999999

EVENT TYPE: OS Outside Patient, <cr>

EVENT STATUS: A ACTIVE

START/ADMIT DATE: T<cr>

PHYSICIAN 1: 40658<cr> CACCIABEVE MD, NICOLAS GEORGE

PHYSICIAN 2: <cr>

DIAGNOSIS: <cr>

COMMENT: <cr>

ACCEPT (A), MODIFY (M), OR REJECT (R)? A

Accept the data entered and system will respond -
 "A new episode has been created" <cr>

5. The system will then display the order entry screen for that CAP sample with the test(s) entered previously in step D. This screen will step you through ordering the specific laboratory test. (Figure 2: Once new episode has been created program advances to Interface Requisition Entry)
6. Review information to verify accuracy by entering <cr> at each line.
Note: The physician code, **40658**, must be re-entered at the prompt, followed by a carriage return.
7. The system will again display the order entry with each line preceded by a line number, 1-11.

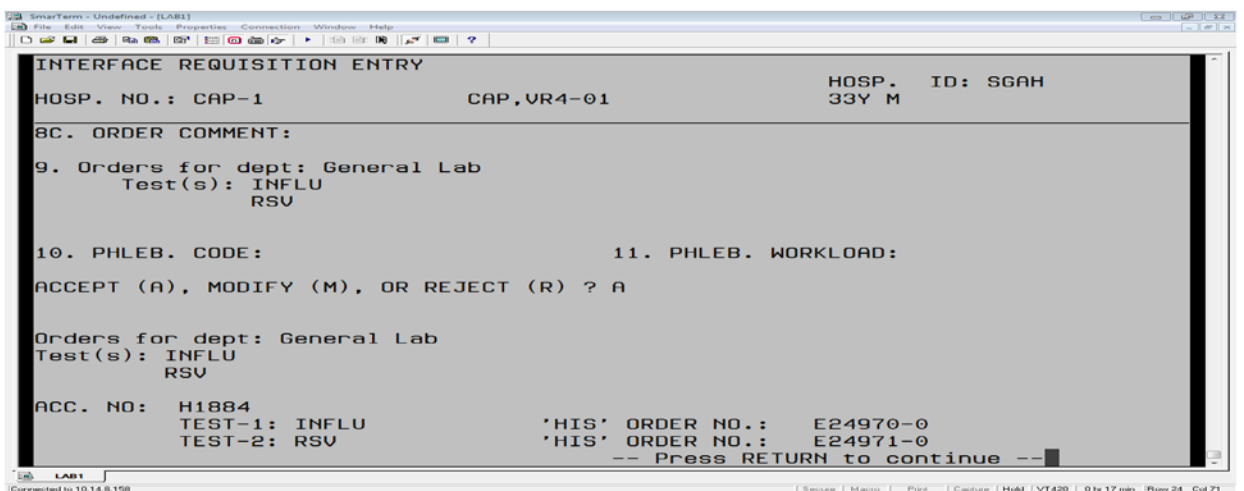


Figure 3: REI section showing tests & Accession and lines 1-11

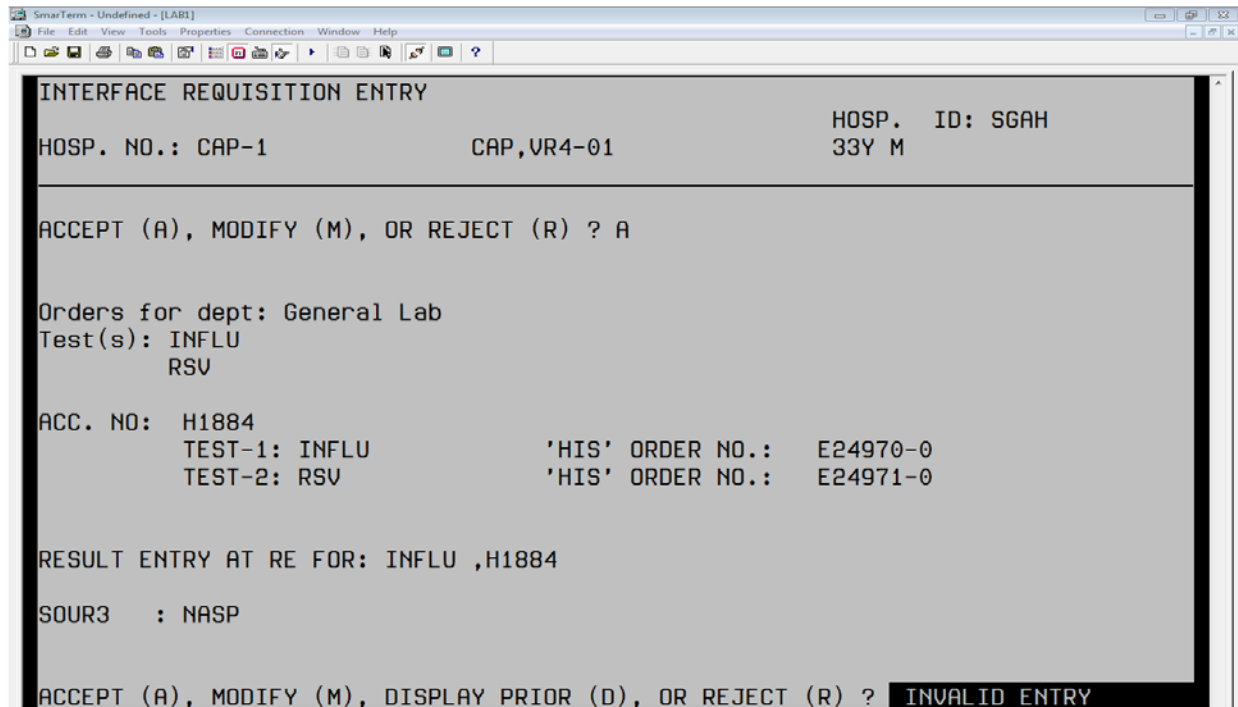


Figure 4: Request for source after completed order

8. At the Accept, Modify, Reject prompt enter:
 - a. **A** to accept and system will assign an accession number for the orders.
 - b. **M to modify** information (test code, name, birthdate, etc.) before the accession number is generated.
 - 1) M-# of the line that needs revised information.
 - 2) Below the information type the correct data, or to delete a test; enter a hyphen "--and, <cr>.
 - 3) The system will then cycle through the entries again until it reaches the Accept, Modify, Reject prompt.
 - 4) When all the information is correct, type **A <cr>**.
9. Some tests may require entry of a specimen source (STYP). Enter a specimen source code, when prompted. (Figure 4: Request for source after completed order)

*Example: STYP1: **GASD** (gastric drain), or **SYN**, or **UR** etc. <cr>*

If unknown source code, enter left bracket (l) followed by first few letters of source and a list of possible codes appears on the screen.

10. Record the Accession number and hospital number (CAP-number) in the Survey LIS orders spreadsheet from step 5B for each sample, following the template.

F. Labels

After ordering and receiving the tests (above), the labels will print automatically on the device entered in step C5.

1. Retrieve the printed labels. Obtain a biohazard transport bag and place the labels, Survey Companion document, and the other associated survey paperwork in the pocket of the bag. Place the survey samples in the transport bag, securely close the bag, and store the samples at the appropriate temperature until tested. Alternatively (such as when the vials will not fit into the biohazard bag), paperwork may be placed with the samples in their shipping container for storage at the proper temperature.
2. Accession labels will be matched to and placed onto samples by the testing personnel.
3. Using the Sunquest Mailbox function, communicate with the appropriate supervisor and group leads that the survey has been ordered, and the location of the samples.

G. Testing and Resulting

1. All samples will appear on the pending logs, and staff will follow the same process used for resolution of untested patient samples (locate the samples and perform the appropriate testing).
2. For specific details of this process, refer to the procedure Proficiency Test Handling and Result Submission.

6. RELATED DOCUMENTS

Proficiency Test Handling and Result Submission, QA procedure
 Survey Companion Document (AG.F48)
 Mailbox Message (Function: MB), Lab policy
 MIQ1 - Maintenance Inquiry, Test Code Lookup, LIS procedure
 REI - Ordering Tests, Receiving Specimens, Reprinting Labels, LIS procedure

7. REFERENCES

None

8. REVISION HISTORY

Version	Date	Reason for Revision	Revised By	Approved By
000	11/9/2011	Section 5: Step B.2 - Change patient last name to 'CAP', provide screen layouts on the order. Step C.3 - Add labeling by testing personnel Step C.4 - Place samples and LIS labels into the biohazard bag with other documentation.	C. Bowman	N. Cacciabeve

Form revised 3/31/00

001	4/2/2015	<p>Section 1: Clarify purpose Section 3: Update job position Section 4: Add definitions CAP, LIS, REI, MIQ1 Section 5: Add sections A, B, and C. Section 5.D: Add details for Batch Hospital ID entry. Add note for determining test codes. Section 5.E.2: Add comment about hyphens, revised 'first' name to the CAP sample letters and sample number, removed specific birthdate. Update screen shots Section 5.F: Remove reprinting labels and dry-erase board step. Add notification of survey orders and sample locations. Section 6: Add LIS procedures and lab policy Footer: version # leading zero's dropped due to new EDCS in use as of 10/7/13 Updated screen shots to correspond with SQ software version.</p>	C. Keifer, C. Bowman	N. Cacciabeve
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9. ADDENDA AND APPENDICES
 None