

## TRAINING UPDATE

**Lab Location:** GEC, SGMC & WAH  
**Department:** Core & Processing

**Date Distributed:** 6/2/2015  
**Due Date:** 6/17/2015  
**Implementation:** 6/17/2015

### DESCRIPTION OF PROCEDURE REVISION

<b>Name of procedure:</b>
<b>TR - Tracking GEC.LIS20, SGAH/WAH.LIS23 v4</b>
<b>Description of change(s):</b>
<p>Section 5: Item B.3 –</p> <ul style="list-style-type: none"><li>• add tests to WLAB (<i>new Chemistry tests to be performed at SGMC</i>)</li><li>• delete gastric occult blood</li><li>• add courier instructions</li></ul> <p><b>This revised SOP will be implemented on June 17, 2015</b></p>

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

**Approved draft for training (version 4)**

Non-Technical SOP

<b>Title</b>	<b>TR - Tracking</b>	
<b>Prepared by</b>	Marie Sabonis	Date: 5/26/2009
<b>Owner</b>	Marie Sabonis	Date: 5/26/2009

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

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

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### **1. PURPOSE**

This procedure describes the process to create either a manual or predefined (tests defined to be tested at other facilities) tracking list, queue and/or modify a tracking list, and receive a tracking list.

### **2. SCOPE**

Specimens are tracked between locations in the Sunquest system to provide an audit trail for specimen management.

### **3. RESPONSIBILITY**

Knowledge of this function is the responsibility of all laboratory staff.

### **4. DEFINITIONS**

TR – Tracking function of Sunquest system

Tracking list templates are defined as either automatic or manual. Automatic templates have specific worksheets/tests associated with them. Manual templates have no associated worksheets/tests. These are primarily used when sending specimens for tests to facilities other than where they are normally tested.

### **5. PROCEDURE**

#### **A. PREPARATION**

1. Upon receipt in the laboratory, all samples must be received in the LIS.
2. Specimens shall be processed according to protocol. Aliquot labels provide information concerning specimen storage and performing department. Additional information concerning minimum sample requirements, special collection procedures, and other special instructions may be viewed using function MIQ.

3. Prior to tracking, samples should be sorted into batches by performing department. One way to accomplish this is to have separate sample racks or holding containers for each performing department.

## B. QUEUEING A BATCH

1. At the Function prompt, type in **TR** and press *enter*
2. At the ? prompt, type in **1** for create a batch and press *enter*
3. At the Template code prompt, type in TEMPLATE CODE (see below) and press *enter*.

### If at SGAH:

- SLAB: to send Core Lab specimens from SGAH to WAH for Thrombin Time
- SPKU: to send SGAH Newborn Metabolic Screens to State\*
- SMAN: to send from SGAH to WAH (manual tracking)

### If at WAH:

- WLAB: to send Core Lab specimens from WAH to SGAH for Rotavirus, Rhogam Evaluation, APT, Ferritin, Vitamin B12, Folate, PSA, Prealbumin, TIBC, Iron and Kleihauer Betke (KBT)  
Specimens are sent once per day via courier; aliquots for chemistry tests will be refrigerated.
- WPKU: to send WAH Newborn Metabolic Screens to State\*
- WMAN: to send from WAH to SGAH (manual tracking)

### If at GEC:

- GIC: to send micro from GEC to SGAH
- GLAB: to send blood cultures, malaria and Core Lab specimens from GEC to SGAH (manual tracking)

### To send malaria smears between sites:

- Use the manual tracking template (GLAB, SMAN or WMAN)
- At the Test prompt, key in **EXAM**. Do NOT enter MAL
- At the Final Destination prompt, enter **WLAB** or **SLAB**

\* Refer to procedure Newborn Metabolic Screening for details.

4. At the Accept, modify, or reject prompt, type in **A** and press *enter*.
5. At the Cut-off date prompt, press *enter*.
6. At the Cut-off time prompt, press *enter*.
7. At the Batch comment prompt, press *enter* for no comment, or add a short free text comment by typing comment (semicolon and text) and press *enter*.

8. At the Accession number prompt, either **TYPE IN LIS ACCESSION NUMBER OR SCAN IN LIS BARCODE LABEL ON THE SPECIMEN** and press *enter*. Only tests that are not performed at the originating site will qualify for the track batch.

**NOTE:** Template code WLAB is defined as an automatic template type. You will not be prompted to scan in the accession numbers. Template will automatically pull appropriate test orders that have not previously been tracked.

9. At the Test prompt,
  - if all the tests on the accession number are accounted for, press *enter*
  - if only one test of the displayed list is available for tracking, type in TEST CODE of test to be placed on track and press *enter*. See step 3 for instructions if sending malaria smears.
  - At the Final destination prompt, press *enter* to accept the defaulted destination.
  - Repeat the above at the Test prompt for other tests on that accession number, or press *enter* to return to the accession number prompt.
10. At the Accession number prompt, repeat steps 8 and 9 for other samples to be placed on the track.
11. When all accession numbers have been added to the track, press *enter* at the Accession number prompt.
12. At the Accept, modify, or reject prompt, type the response for the appropriate action.
13. At the Printer prompt, type in Sunquest Printer Number and press *enter*.
14. At the Use host <B> prompt, press *enter*. The Queued for Transit list will print. The batch number is located on the top of the printout.
15. Each time a new batch is created, a Track Missing List is generated. This contains items that are eligible for tracking but have not been placed on a list. These items need to be researched to determine their status.

### C. ADDING/DELETING SPECIMENS ON A BATCH

1. Items may be added to a queued for transit batch. At the Function prompt, type in **TR** and press *enter*.
2. At the ? prompt, type in **2** for Modify batch and press *enter*.
3. At the Batch number prompt, type in **BATCH NUMBER FROM QUEUED FOR TRANSIT LIST** and press *enter*.

4. The Originating, Current, and Next Track Locations will display. Press *enter* to accept the locations.
5. At the Batch comment prompt, press *enter*.
6. At the Batch status (QT/TR/D): QT prompt, press *enter*. Modifications may also be performed when the batch is in TR (transit) status.
7. At the Print (<Y>/N) prompt, press *enter*.
8. At the Sort (<A>/D/F/W): prompt, press *enter*.
9. At the Accession number prompt, either **ADD AN ACCESSION NUMBER TO THE TRACK** as above, or type **-ACCESSION NUMBER** and press *enter* to delete the accession number from the track.
10. At the Accession number prompt, either process other samples as above, or press *enter*.
11. The system will display the new track list. At the Accept, modify, or reject prompt, answer according the action needed.
12. At the Printer prompt, type in Sunquest Printer Number and press *enter*.
13. At the Use host <B> prompt, press *enter*. The new Queued for Transit list will print.

#### **D. PLACING A QUEUED BATCH INTO TRANSIT**

1. When the courier is ready to transport the batch to the next track location, at the Function prompt, type in TR and press *enter*.
2. At the ? prompt, type in **2** for Modify batch and press *enter*.
3. At the Batch number prompt, type in the **BATCH NUMBER FROM QUEUED FOR TRANSIT LIST** and press *enter*.
4. The Originating, Current, and Next Track Locations will display. Press *enter* to accept the locations.
5. At the Batch comment prompt, press *enter*.
6. At the Batch status (QT/TR/D): QT prompt, type in **TR** for In Transit and press *enter*.
7. At the Print (<Y>/N) prompt, press *enter*.
8. At the Sort (<A>/D/F/W): prompt, press *enter*.

9. At the Accession number prompt, you may add or delete accession numbers as above. Otherwise, press *enter*.
10. The system will display the new track list. At the Accept, modify, or reject prompt, answer according the action needed.
11. At the Printer prompt, type in Sunquest Printer Number and press *enter*.
12. At the Use host <A> prompt, press *enter*. The new In Transit list will print. This list must be sent with the samples to the next destination. All samples should be accounted for on this list.

## E. RECEIVING A BATCH

1. When a batch is received at the next destination, it should be inspected to ascertain that it contains what is printed on the tracking list. Incomplete batches should have the missing accession numbers deleted from the batch (see Adding/Deleting Specimens from Batch) before final tracking. Complete batches may be taken to the performing department and tracked to their final destination.
2. In the performing department, at the Function prompt, type in **TR** and press *enter*.
3. At the ? prompt, type in **3** for Receive batch/specimen and press *enter*.
4. At the Batch number prompt, type in **BATCH NUMBER FROM TRANSIT LIST** and press *enter*.
  - If the tracking list is not sent with the samples, you may look up the batch number using function ANIQ; upon entering one of the accession numbers, the batch number will display.
5. At the Current track location prompt, type in **CURRENT (FINAL) LOCATION OF THE BATCH (SLAB or WLAB)** and press *enter*. Final locations include:
  - Chemistry
  - Hematology
  - Serology
  - Microbiology
6. At the Batch comment prompt, press *enter*.
7. At the Entire batch continues/disbands (<C>/D) prompt, type in **D** and press *enter*.
8. At the Print (<Y>/N) prompt, press *enter*.
9. At the Sort (<A>/D/F/W) prompt, press *enter*.

10. The system will display the action to be taken. At the Accept, modify, or reject prompt, respond according to the action necessary.
11. At the Printer prompt, type in SunQuest Printer Number and press *enter*. At the Use host <B> prompt, press *enter*.

## F. MANUAL TRACKING

1. Manual tracking may be used to track samples without having to put them onto a batch. This function is useful for stat samples, including fluid tests. Samples should be taken directly to the final destination department to be stat tracked. This function is also useful for “problem” track samples.
2. At the Function prompt, type in **TR** and press *enter*.
3. At the ? prompt, type in **1** for Create Batch and press *enter*.
4. At the Template prompt, type in **SMAN, WMAN or GLAB** and press *enter*.
5. The tracking template will display. Type “A” to accept and press *enter*.
6. At the Batch Comment: prompt, press *enter*.
7. At the Accession number prompt, either **TYPE IN LIS ACCESSION NUMBER OR SCAN IN LIS BARCODE LABEL ON THE SPECIMEN** and press *enter*.
8. At the Test prompt, type in the LIS test code and press *enter*.
9. At the Final Destination prompt: enter either WLAB (if sending to WAH) or SLAB (if sending to SG) and press *enter*.
10. At the Test prompt, enter in either another Test code that needs to be sent out or press *enter*.
11. At the Accession number, proceed as above with other accession numbers. If there are no more numbers to track, press *enter*.
12. The system will display the samples to be tracked. At the Accept, Modify, or Reject prompt, type A to accept and press Enter.
13. At the printer prompt enter in the appropriate printer number.



**G. TRACK STATUS KEY**

- The following track status types will print on the various track lists and pending logs in the departments

<b>CODE</b>	<b>STATUS</b>
U	Unreceived Specimen
R	Received - Not on Batch
Q	Queued for Transit
TR	In Transit
F	Final Destination Received
+	More than One Status - Review in ANIQ

**6. RELATED DOCUMENTS**

Newborn Metabolic Screening, Specimen Processing procedure

**7. REFERENCES**

SunQuest Systems Functions Training Manual, 7/30/01

**8. REVISION HISTORY**

<b>Version</b>	<b>Date</b>	<b>Reason for Revision</b>	<b>Revised By</b>	<b>Approved By</b>
		Supersedes SOP LIS019.001		
000	06/21/12	Section 5: Replaced PKU with Newborn Metabolic Screen	M Sabonis	M Sabonis
001	02/12/14	Section 5: Added tests to item B.3; added note for template WLAB to item B.8 Section 6: Added SOP Footer: version # leading zero's dropped due to new EDCS in use as of 10/7/13.	M Sabonis	M Sabonis
2	11/17/14	Section 5: Item B.3- add tests to WLAB, delete GEC code GXBLC, add malaria smear instructions	L Barrett	M Sabonis
3	5/4/15	Section 5: Item B.3 - add tests to WLAB, delete gastric occult blood, add courier instructions	M Sabonis	M Sabonis

**9. ADDENDA AND APPENDICES**

None