

TRAINING UPDATE

Lab Location: SGMC
Department: Client Service

Date Distributed: 7/23/2015
Due Date: 8/10/2015
Implementation: 8/10/2015

DESCRIPTION OF REVISION

Name of procedure:
Client Service Daily Activities SGAH.CS08 v2 SGAH Client Services Daily Duties Checklist AG.F153.2
Description of change(s):
Section 5: add miscellaneous test process, remove verbal orders and printed report distribution, add failed fax process, add detail to other duties Section 6: update titles, add checklist Section 9: delete envelope ordering process This SOP and FORM will be implemented on August 10, 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	Samson Khandagale	Date: 11/9/2009
Owner	Samson Khandagale	Date: 11/9/2009

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 other staff when assigned to the reception desk.

3. RESPONSIBILITY

All staff assigned to this area must understand and perform these duties in a timely manner.

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 **with a smile and a greeting.**
2. Process orders:
 - a. Place orders in LIS (laboratory information system) according to **SOP.**
 - b. Contact physician's office when there are questions concerning **unclear lab tests. Inform patient of the delay and approximate wait time. Answer any questions that patients may have.**
 - 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) Group Lead / Supervisor

- 5) Quest Diagnostics: Chantilly or Baltimore Client Services Departments as needed.
- 6) Order tests not in LIS noted as miscellaneous tests, only after Lab Director authorizes the test. Follow SOP 'Miscellaneous Test Ordering'. If we cannot provide services for a particular test or patient refuses to have test(s) performed at the hospital, provide Quest Diagnostics PSC (Patient Service Center) address and phone number.
 - d. Since Lab does not collect non blood specimens, and the Emergency Dept. cannot collect outpatient samples, refer patient to a Quest Diagnostics PSC (Patient Service Center) and provide address and phone number.
3. Perform phlebotomy as per established procedure after blood tests are ordered.
4. Handle registered non-blood specimens that are dropped off by patients from Doctor's offices.
5. 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
6. Register All Out-reach patients and AHC contracted entities according to procedure.
 - a. Have all patients registered by providing Lab Requisitions to Patient Access Registrars.
 - b. Place lab order in LIS when applicable.
 - c. Place on Call-back according to physician's request.
 - d. Confirm that the correct Ordering Physician has been entered.
7. Standing orders:
 - a. Standing orders are good for the time designated by the physician. When a physician is not time specific, the order is good for 6 months from the first visit to the lab.
 - 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~~ 60 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 faxed to the appropriate Ordering Physician offices.
 - ~~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. Newborn Metabolic Syndrome (NMS) results are faxed to the appropriate pediatrician offices and a copy sent to the Health Information Management (HIM) department in inter-office mail envelope.
3. Pathology Reports are handled by the Pathology department.
4. Handle failed faxes according to SOP.

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. Fax toner and printer cartridges
 - ~~i. Envelopes refer to Addenda A for steps to order envelopes~~
 - j. LIS Printer labels/rolls.
 - k. Other office supplies
 - l. When lab supplies arrive, unpack and put away

2. Maintain Equipment
 - a. Fax machine
 - b. Copy machine
 - c. Label Printer
 - d. Laser Printer
 - e. Tube System
 - f. Phones
 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 receipt in LIS ~~Processing procedures as assigned~~
 3. Complete Daily Duties Checklist.
~~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:
 - Record room temperature
 - Page phlebotomists and provide assistance to team members.
 - Provide in house phlebotomy services as assigned / requested, including Infusion Center.
 - Check patient's restroom for cleanliness.
 - Call Environmental Services Staff as needed for cleaning lab areas, including rest rooms.
 - Escort patients when requested or the situation warrants, within the hospital, including assisting patients in wheel-chairs.
 - Deliver all lab specimens to the appropriate lab sections.
 - Use Pneumatic tube system.
 - Schedule patients for lab tests, examples GTT, Sweat Test.
 - Prepare of Iron Mountain boxes for off-site storage.
 - Provide training to hospital personnel, lab new hires as requested/ as assigned.
 - Review Standing Orders for expirations; call Physician office for updated copies.

- Participate in customer engagement/satisfaction lab and/or hospital huddles as requested/ assigned by Manager/Supervisor/Group Lead.
- Maintain positive interaction with all hospital personnel, volunteers and participate in feedback on customer engagement/ satisfaction scores.

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

[SGAH Client Services Daily Duties Checklist \(AG.F153\)](#)

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
001	7/1/2015	Section 5: add miscellaneous test process, remove verbal orders and printed report distribution, add failed fax process, add detail to other duties Section 6: update titles, add checklist Section 9: delete envelope ordering process Footer: version # leading zero's dropped due to new EDCS in use as of 10/7/13	S Khandagale	S Khandagale

9. ADDENDA AND APPENDICES

None

Form revised 3/31/00

SGAH CLIENT SERVICES DAILY DUTIES CHECKLIST

Instructions: Checklist is to be completed on a daily basis. Staff is required to work together as a team and distribute duties among themselves and be ready to receive assignments from Lead/Supervisor on an as needed, as assigned basis.

Daily Duty	Time	Initials
<ul style="list-style-type: none"> • Check entire out-patient lab area including all Phlebotomy rooms. • Load Laser Printers & fax machine with paper. • Check label printers for label roll. Re-fill as needed • Record Room Temperature (weekly/monthly sign off due- notify Group Lead) • Glucola expiry check. Water check. • Check Out Patient Restroom. If service needed: Call environmental services • Clean all desk surfaces/counter tops, all Phlebotomy chairs, Baby station, and recliner/exam bed with approved disinfecting wipes. • Verify Hospital Registration/ Patient Access department is staffed: <ul style="list-style-type: none"> ○ If staff is present - let them know you are in the lab. ○ If staff is not present - inform supervisor and follow directions. • Transfer phone back to Front desk. • Check Tube system. If service needed: Call Plant Operations / Electrician and record work order ticket number on this checklist. 	0630- 0655	
Review internal scheduler/ planner for GTT and other scheduled tests	0655-0700	
<i>Open Out-Patient door for service and roll out patient sign in sheet/clipboard</i>	0700	
Login in LIS PC and Review Callback Program. Check fax machine, desk and tube system for Critical Value reports. If found check LIS to see if already called - if not, begin calling inpatient lab results according to SOP. Out Patient: Page Physicians and follow SOP for proper documentation.	0715	
Review Break & Lunch schedules with Group Lead/Designee	0800	
Fax Out Patient reports to Drs. offices.		
Weekly Check: (Mon/Tue) Eye-wash station. If service is required: Call Plant Operations to open ticket, record on this checklist and notify supervisor.	0815	
Check and make copies of patient instruction sheets/ and forms		
Review Standing Orders & find test codes in advance.		
Review Pre-Admission Testing orders, if any file by last name in folder.		
Review previous day's Daily Duties checklist to review completion of all tasks.		
Review second check Audit Log, update and sign		
<i>Callback Program: check/update/call/fax/refresh</i>	0900	
Check stock/supplies/expiry and Clean Outpatient areas & Chairs		
Check machine for failed faxes and follow SOP to fax results to Dr.'s offices.	0930	
Weekly Check: (Mon/ Tue) Office Supplies/Iron Mountain box check.		
<i>Callback Program: check/update/call/fax/refresh</i>	1000	
Review & enter calls made from reference lab on call log as needed		
Check patient waiting lounge, and patient restroom for cleanliness status. Check for specimens in the restroom and the specimen receptacle window.		
Weekly Check: (Wed/ Thu) Patient Emergency buzzers in all patient rooms.	1030	
<i>Callback Program: check/update/call/fax/refresh</i>	1100	
Check machine for failed faxes and follow SOP to fax results to Dr.'s offices.	1130	
Count OP Reqs/Patient Visits on Daily Requisition folder/ spreadsheet	1145	
<i>Callback Program: check/update/call/fax/refresh</i>	1200	
Review second check Audit Log, update and sign		

Daily Duty	Time	Initials
Review & enter calls made from reference lab on call log as needed		
Callback Program: check/update/call/fax/refresh	1300	
Check machine for failed faxes and follow SOP to fax results to Dr.'s offices.	1330	
Callback Program: check/update/call/fax/refresh	1400	
Review second check Audit Log, update and sign.		
Review & enter calls made from reference lab on call log as needed		
Check patient waiting lounge and restroom for cleanliness and specimens.		
Callback Program: check/update/call/fax/refresh	1500	
Check machine for failed faxes and follow SOP to fax results to Dr.'s offices.	1530	
Change of shift: Given over to _____ by _____		
Callback Program: check/update/call/fax/refresh	1600	
Check Out Patient Restroom. Call environmental services for service if needed. Clean all desk surfaces/counter tops, Phlebotomy chairs, Baby station, and recliner/exam bed with disinfecting wipes.	1630	
Review second check Audit Log, update and sign		
Callback Program: check/update/call/fax/refresh	1700	
Check machine for failed faxes and follow SOP to fax results to Dr.'s offices.	1730	
Callback Program: check/update/call/fax/refresh	1800	
Review & enter calls made from reference lab on call log as needed		
Review second check Audit Log, update and sign		
Clean all desk surfaces/counter tops, Phlebotomy chairs, Baby station, and recliner/exam bed with disinfecting wipes. Call environmental services if needed.		
Insert paper in fax machine and printers.		
Check Patient waiting lounge and tidy up for next day.		
Transfer Phone to Specimen Processing.		
Check machine for failed faxes and follow SOP to fax results to Dr.'s offices.	1830	
Total up OP Reqs/Patient Visits on Daily Requisition folder/ spreadsheet		
Callback Program: check/update/call/fax/refresh	1850	
Perform a final check of all patient rooms, patient rest room and tube station for specimens.		
Handover follow up call information/Pending/Unsuccessful Callback information to Specimen Processor/Lead Tech for follow-up on this checklist. Handed over to _____ by _____ Time _____	1900	
Information:		
Place completed Daily Duties Checklist in daily requisitions folder		

Comments: _____

_____ Add a sheet for additional comments

Lead Tech/ Designee signature: _____ Date: _____