

TRAINING UPDATE

Lab Location: SGMC and WAH
Department: Client Services

Date Implemented: 4.12.2017
Due Date: 4.29.2017

DESCRIPTION OF PROCEDURE REVISION

Name of procedure:
Client Services Daily Activities and Client Services Daily Duties Checklist
Description of change(s):
<p>The content of the procedure was updated to reflect current practice. The format and wording were updated to streamline the procedure.</p> <p>The form was updated to reflect changes to the procedure.</p> <p>Note: We should be inspecting the area and stocking before we leave at night AND in the morning when we open.</p>

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Non-Technical SOP

Title	Client Service Daily Activities	
Prepared by	Stephanie Codina	Date: 4/5/2017
Owner	Stephanie Codina	Date: 4/5/2017

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 to all staff members assigned to the reception desk in the client services area of the outpatient laboratory.
- 3. RESPONSIBILITY**
 All client services staff members must understand and adhere to this procedure.
- 4. DEFINITIONS**
 None
- 5. PROCEDURE**

Customer Service Expectations (Regular Duties)

Step	Action
1	Greet patients, visitors, physicians, and hospital personal in a friendly manner using AIDET techniques.
2	Place outpatient orders in Sunquest per departmental procedures. Clarify orders that are difficult to read or unclear using the following resources: A. Contact the physician's office to clarify orders. B. Use available resources to determine the proper order/specimen requirements. These include, but are not limited to, a. Sunquest function MIQ b. Quest Diagnostics website c. Quest Diagnostics Client Services Department d. Supervisor/technical staff members in the lab

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Step	Action
3	Perform patient identification and phlebotomy per departmental procedure. Ensure all patients are wearing a hospital armband prior to phlebotomy.
4	Disinfect phlebotomy chairs and baby drawing station using a hospital-approved disinfectant wipe after every patient.
5	Handle incoming telephone calls per procedure using appropriate telephone etiquette. <ul style="list-style-type: none"> A. Provide general information to patients. B. Print and fax laboratory results for patients and physician offices/clinics. C. Provide instructions for collection of non-blood specimens. D. Transfer calls to the appropriate department/person as indicated.
6	Monitor the callback list. At least hourly, follow up and document per procedure. <ul style="list-style-type: none"> A. Call critical values and positive cultures to physician's offices or nursing units. For testing performed on inpatients that have been discharged, notify the hospitalist on duty. B. Fax results to physician offices and clinics.
7	Ensure outreach patients are registered by forwarding information to the admitting department.
8	Escort patients to a handicap restroom if requested.
9	Refer patients to a Quest PSC or physician's office if a non-blood specimen collection is required. Laboratory staff members do not collect non-blood specimens.

Daily Duties

Step	Action
1	Complete the Client Services Daily Duties checklist.
2	Disinfect the phones, front desk area, and waiting area with a hospital-approved disinfectant wipe at the beginning and end of each shift. Tidy the waiting area. Call environmental services as needed to ensure a clean area.
3	Verify we have an adequate inventory of supplies (including glucola) and that all supplies are within the expiration period. Order and restock as needed.
4	Verify we have an adequate supply of office supplies and forms. Order and restock as needed.

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Step	Action
5	Maintain equipment and ensure an adequate supply of paper, labels, and printer cartridges. A. Fax machine B. Copy machine C. Label printer(s) D. Laser printer(s)
6	Check and document room temperature on the log. Take corrective actions as needed.
7	Fax outpatient laboratory results to physician's offices. A. The outpatient results report will automatically print Monday through Friday. a. SGMC reports print at 0651 am. b. WAH reports print at 1001 am. B. Fax results to the physician's office using the Laboratory Inquiry function in Sunquest.
8	Fax the "Copy To" results to physician's offices. "Copy to" results are those results that the patient requests be faxed to an additional provider who was not the ordering provider. A. The copy to report will automatically print Monday through Friday. a. SGMC reports print at 0700 am. b. WAH reports print at 0820 am. B. Fax results to the physician's office using the Laboratory Inquiry function in Sunquest.
9	Update the "Standing Order File." A. Standing orders are good for 6 months. B. Pull any standing order that will expire within 1 week. C. Notify the physician that the standing order is going to expire. Request a new standing order if indicated.
10	Disseminate results faxed from Quest Diagnostics. Document the date/time of call, the name of the person notified, and your initials on the back each form. A. Call and fax inpatient results to the nursing unit. For inpatients that have been discharged, notify the hospitalist. B. Call and fax outpatient results to the ordering provider's office or clinic. C. File reports in the designated area.

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Step	Action
11	Disseminate results received from non-Quest reference laboratories. A. Make a copy of the report. B. Fax the report to the ordering provider. C. File the original in the "non-interfaced folder" alphabetically by last name. D. Refer to the Newborn Screen SOP for additional detail.
12	Audit test requisitions to ensure all tests requested by the provider have been ordered. Correct and/or document issues that are identified.

6. RELATED DOCUMENTS

- SOP: Telephone Courtesy Standards
- SOP: MIQ 1—Maintenance Inquiry, Test Code Lookup
- SOP: MIQ 23—Maintenance Inquiry, Additional Test Information
- SOP: Callback
- SOP: Temperature and Humidity Quality Control
- SOP: Critical Values
- SOP: Laboratory Inquiry for Result Lookup, Printing and Faxing
- Form: Room Temperature Log (Non-Technical), AG.F172
- Form: Client Services Daily Duties Checklist, AG.F375
- 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

9. ADDENDA AND APPENDICES

N/A

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