TRAINING UPDATE

Lab Location: Department:

GEC, SGMC & WAH Core Lab

Date Distributed:
Due Date:
Implementation:

8/28/2017 9/18/2017 **8/30/2017**

DESCRIPTION OF PROCEDURE

Name of procedure:

Data Innovations Instrument Manager SGAH.L49 v6

Description of change(s):

Addendum 3 [Sysmex (Hematology) Instrument Specific Actions] was revised to add more information, specifically steps 11-19

Notes:

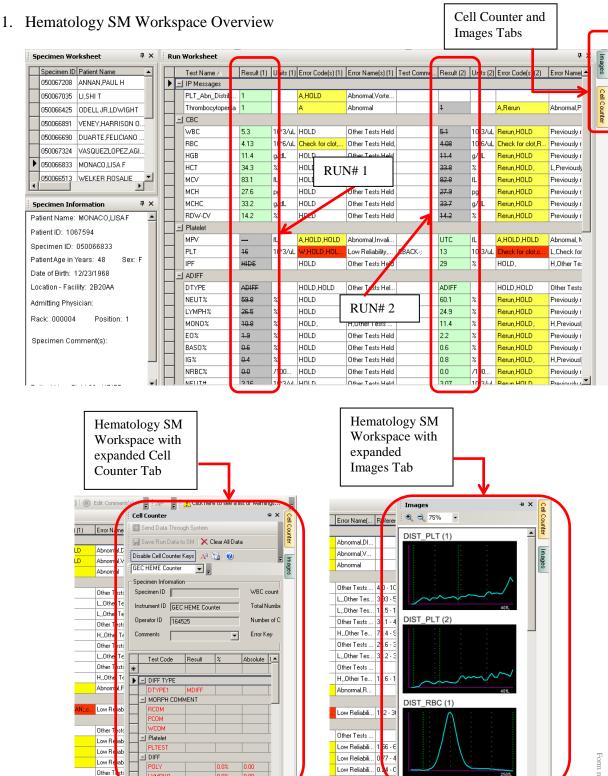
- To make the review easier, the attached SOP has addendum 3 shown first, followed by the rest of the SOP
- The quiz covers use of DI when operating the Sysmex. You may wish to print that section of the SOP or keep it displayed on the computer so you can refer to it.

This revised SOP will be implemented on August 30, 2017

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

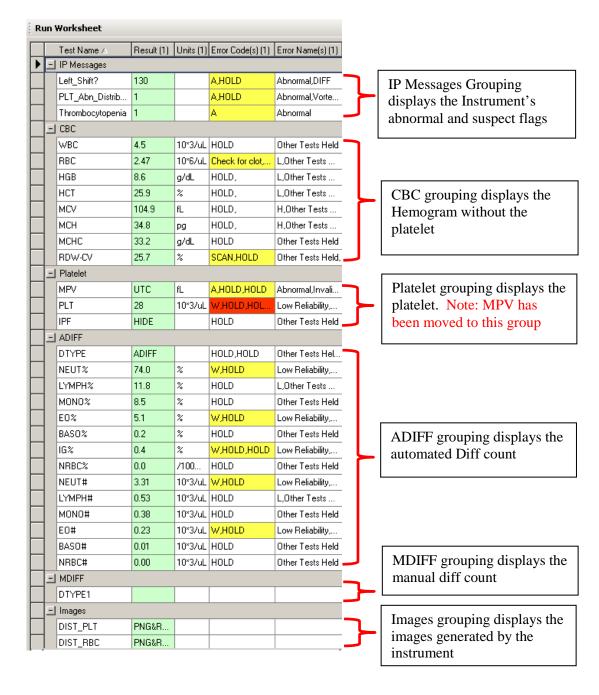
Addendum 3

Sysmex (Hematology) Instrument Specific Actions

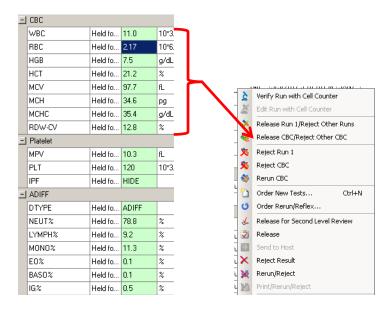


2. Hematology RunWorksheets Test Grouping

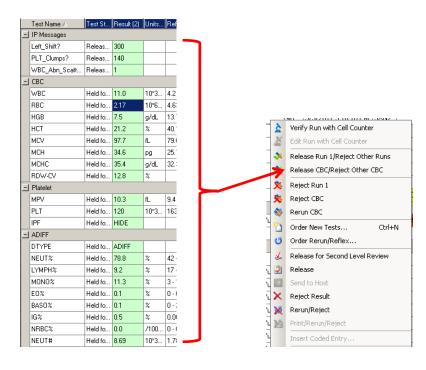
The Hematology RunWorksheet is divided into six test groups. The groups are IP Messages, CBC, Platelet, ADIFF, MDIFF and Images. See the description of each group below.



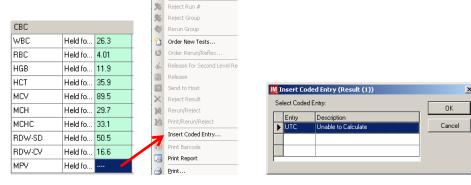
- 3. Release or reject by Group
 - a. Right click on the test to be released/rejected
 - b. If "Release CBC/Reject Other Runs" is selected, DI will release the CBC and reject other CBC from a different run



- 4. Release or reject by Run #
 - a. Right click on the specific Result # column to be released/rejected
 - b. If "Release Run 1/Reject Other Runs" is selected, DI will release that specific run# and reject other runs



- 5. To Insert Coded Entry within the Hematology Run Worksheet
 - a. Right click on the result field to be edited
 - b. Select "Insert Coded Entry"
 - c. Select the appropriate code and click OK to close the window



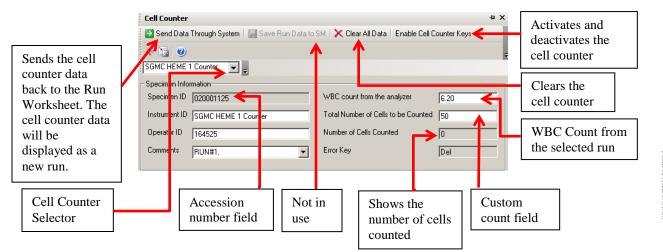
6. To see the previous MDIFF performed

Go to the DTYPE1 result field and scroll to the right until the most recent previously result of MDIFF is displayed. If there is one, check the date and time of resulting

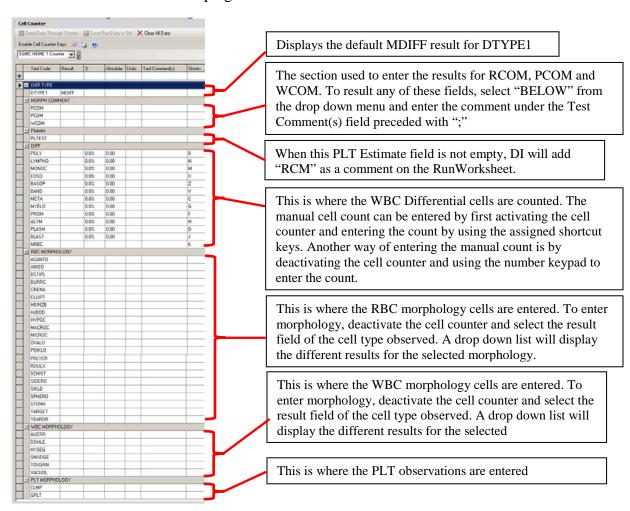


7. Overview of the the Cell Counter

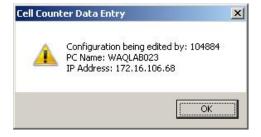
a. Cell Counter Functions and Fields



b. Cell Counter Grouping



c. Each site, with the exception of GEC, has two cell counters. Each cell counter can only handle one active user. If another user tries to access the same cell counter that is already in use, DI will display an error that says "configuration is being edited by user: 123456"



Location	Cell Counter Assignment
GEC	GEC Heme Counter
SGMC Microscope #1	SGMH Heme 1 Counter
SGMC Microscope #2	SGMH Heme 2 Counter
WAH Microscope #1	WAH Heme 1 Counter
WAH Microscope #2	WAH Heme 2 Counter

8. Using the Cell Counter

a. To Enter the Accession number for the Cell Counter

There are two ways of entering the accession number for use by the Cell Counter. Once the accession number has been entered, the WBC Count_from_the_Analyzer field will be populated with the WBC count from the selected run

- i. By using the "Verify Run with Cell Counter"
 - Right click on the specific result column that you would like to be verified by the cell counter
 - Select the "Verify Run with Cell Counter"



Note: When the verify Run with Cell Counter is grayed out, do the following:

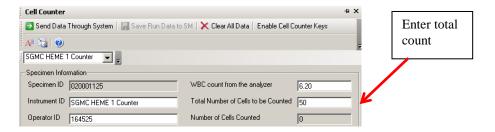
- o go to the cell counter tab and select a cell counter that is not in use (see section 7c)
- o go back to the run worksheet
- ii. By manually typing the specimen ID within the Cell Counter
 - Select the appropriate cell counter for your location
 - Enter the accession number within the Specimen ID field and press the TAB key



b. Setting the Total Number of Cells to be Counted field

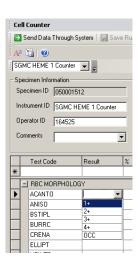
To change the Total Number of Cells to be Counted:

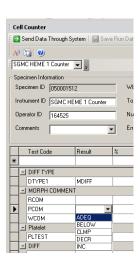
- Disable the Enable Cell Counter Keys button.
- Enter the desired total count on the "Total Number of Cells to be Counted" field. The default count is 100



- c. To Insert Coded Entry within the Cell Counter
 - a. Toggle the "Enable Cell Counter" button to disable it
 - b. Click on the result field to show the drop-down menu arrow
 - c. Click on the drop-down menu arrow
 - d. Select the appropriate code

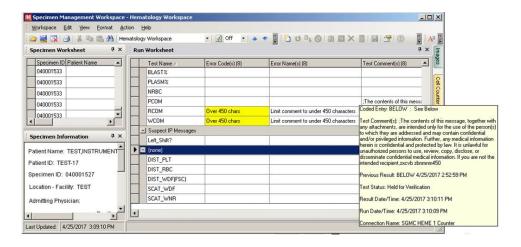
Note: The coded entry only works for Morph Comment, Platelet, RBC Morphology, WBC Morphology and PLT Morphology groups





d. Resulting WCOM (Path Review)

- To enter the narrative from the Path Review, click on the WCOM result field and select "BELOW" from the drop down list. Under the WCOM Test Comment field, enter the path review narrative.
- There is a limit of 450 characters for WCOM. This limit also applies to RCOM and PCOM fields. DI will display an error message of "Over 450 characters" when the comment entered on this field is over the limit



9. Error and IP (Interpretive Program) Messages

Error Code	Error Name	Description			
A	Abnormal	Abnormal result due to analysis or hardware error			
W	Low Reliability	This error code is equivalent to asterisk (*) on Sysmex printout			

IP Message	Work Instruction
Atypical_Lympho?	DIFF- Perform diff
Blasts/Abn_Lympho?	DIFF- Perform diff
Dimorphic_Population	Scan smear for abnormal RBC morph
Fragments?	Scan smear for abnormal RBC morph
IG_Present	DIFF- Perform diff
Left_Shift?	DIFF- Perform diff
NRBC_Present	SCAN. Remove if not seen on smear
PLT_Abn_Distribution	Vortex and Rerun
PLT_Abn_Scattergram	Vortex and Rerun
PLT_Clumps(S)	If not clotted, Vortex. Rerun in PLT-F mode. If unresolved, SCAN
PLT_Clumps?	If not clotted, Vortex. Rerun in PLT-F mode. If unresolved, SCAN
RBC_Abn_Distribution	Scan smear for abnormal RBC morph
RBC_Agglutination?	Warm at 37, rerun. If unresolved, perform plasma replacement
RET_Abn_Scattergram	Perform 1:5 dilution
Sample_Mixing_Failure?	Vortex and Rerun
Turbidity/HGB_Interference?	If gross hemolysis, cancel with HMT. If lipemic, do saline
	replacement
WBC_Abn_Scattergram	SCAN for abnormal cells and NRBC

Ru	n '	Worksheet					_		
		Test Name ∠	Test St	Result (2)	Units	Error Code(s) (2)	Error Name(s) (2)		
	_	IP Messages							
		Left_Shift?	Releas	300		A,HOLD	Abnormal,DIFF		Examples of IP
		PLT_Clumps?	Releas	140		A,HOLD	Abnormal,If not clotted,	 	Messages and
		WBC_Abn_Scatt	Releas	1		A,HOLD	Abnormal,SCAN for abn		Abnormal error codes
	-	CBC							
		WBC	Held fo	11.0	10*3	HOLD	H,Other Tests Held		
		RBC	Held fo	2.17	10*6	HOLD,HOLD,H	L,Other Tests Held		
		HGB	Held fo	7.5	g/dL	HOLD	L,Other Tests Held		
		HCT	Held fo	21.2	%	HOLD	L,Other Tests Held		
		MCV	Held fo	97.7	fL	HOLD	H,Other Tests Held		
		мсн	Held fo	34.6	pg	HOLD	H,Other Tests Held		
		мснс	Held fo	35.4	g/dL	HOLD	Other Tests Held	1 .	
		RDW-CV	Held fo	12.8	%	HOLD	Other Tests Held		Examples of "W"
	_	Platelet							(Low reliability) error
		MPV	Held fo	10.3	fL	W,HOLD	Low Reliability,Other Te		codes. "W" is
		PLT	Held fo	120	10*3	W,Check for Cl	Low Reliability,Vortex,		equivalent to asterisk
		IPF	Held fo	HIDE		HOLD	Other Tests Held		(*) on Sysmex

10. Release/Hold Conditions

Condition	CBC	PLT	DIFF	RET	Release/Hold	
1	Normal	Normal	Normal	Normal	Release CBC, PLT, DIFF & RET	
2	Normal	Normal	Normal	Abnormal	Release CBC, PLT, DIFF. Hold RET	
3	Normal	Normal	Abnormal	Normal	Release CBC, PLT & RET. Hold DIFF	
4	Normal	Normal	Abnormal	Abnormal	Release CBC & PLT. Hold DIFF & RET	
5	Normal	Abnormal	Normal	Normal	Release CBC & RET. Hold PLT & DIFF	
6	Normal	Abnormal	Normal	Abnormal	Release CBC. Hold PLT, DIFF & RET	
7	Normal	Abnormal	Abnormal	Normal	Release CBC & RET. Hold PLT & DIFF	
8	Normal	Abnormal	Abnormal	Abnormal	Release CBC. Hold PLT, DIFF & RET	
9	Abnormal	Normal	Normal	Normal	Release RET. Hold CBC, PLT, DIFF	
10	Abnormal	Normal	Normal	Abnormal	Hold CBC,PLT,DIFF & RET	
11	Abnormal	Normal	Abnormal	Normal	Release RET. Hold CBC, PLT, DIFF	
12	Abnormal	Normal	Abnormal	Abnormal	Hold CBC,PLT,DIFF & RET	
13	Abnormal	Abnormal	Normal	Normal	Release RET. Hold CBC, PLT, DIFF	
14	Abnormal	Abnormal	Normal	Abnormal	Hold CBC,PLT,DIFF & RET	
15	Abnormal	Abnormal	Abnormal	Normal	Release RET. Hold CBC, PLT, DIFF	
16	Abnormal	Abnormal	Abnormal	Abnormal	Hold CBC,PLT,DIFF & RET	

11. Coded Entry

The following are added to all the components of the CBC and Platelets:

HIS: Result consistent with patient history

PTR: Patient transfused SREV: Smear reviewed UTC: Unable to calculate

CLMP: Clumped **Added to platelet group only

OCC-CLMP: Occasional Clumping **Added to Platelet group only 1+, 2+, 3+, 4+, OCC: Possible results for GPLT (Giant Platelets)

INC, DEC, ADEQ, BELOW: Possible results for PCOM

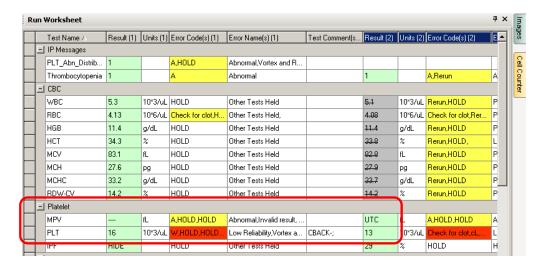
12. Clumped platelets

Action: Depending upon quantity of clumping noted

- a. If platelets clumping is more than occasional, then report PLT as CLMP and result MPV as UTC.
- b. If platelets clumping is occasional, then add comment of OCC-CLMP in the Test comment field associated with PLT.

13. MPV

If on the first run MPV is resulted as "---" DI will display an error code to rerun. If the rerun is still "---" DI will automatically replace "---" with code UTC



14. SCAN indicated in DI

Action:

Review slide for abnormal cells. If no abnormal cells are seen, then enter SREV [Smear Reviewed] under the Test Comment field for the test that is associated with the SCAN comment.

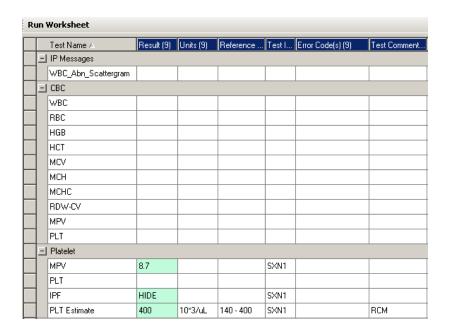
15. Resulting CBC with automated diff with Morphology

- a. Change DTYP1 result to ADIFF
- b. Enter morphology results via the Cell Counter
- c. Click on "Send data through system"
- d. Release the MDIFF group on the run that you want to release
- e. Release the ADIFF group on the run that you want to release

16. Platelet Estimates

- a. Use Cell Counter to result platelet estimate.
- b. Click on "Send data through system"
- c. Platelet estimate results will display in a new run along with the MPV results.
- d. Release the platelet group with the platelet estimate (it will automatically reject the other platelet groups)

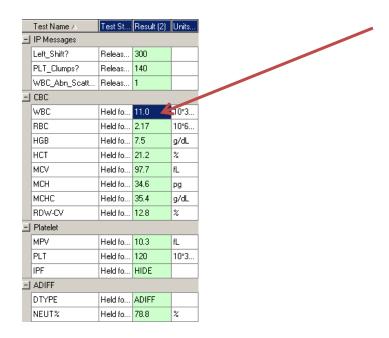
Note: if MPV result is "---" then result MPV in Cell Counter as UTC



17. How to select results to release

a. If you want to release by Group Left click on one of the results in the group. Then right click and select **release by group.** *Example*:

We want to release the "CBC" group. We select the WBC result field and then right click to select "release by group"



b. If you want to release an individual test result Left click on the result on the RUN that you want to release. Then right click and select Release.

18. Order of result release is **VERY IMPORTANT**

Never release the ADIFF or MDIFF first

Depending on the actual test results for a particular specimen, release in this order:

CBC group, followed by Platelet group, then ADIFF or MDIFF

CBC group, followed by Platelet group, then Morphology, and ADIFF last

CBC group, followed by Platelet Estimate, then MDIFF

19. Color Coding Standard (Standard coding across all instruments connected via DI)

Description	Criteria	Format Type	Field to Format	Value	Workspaces to Format
Critical	'cH' or 'cL'	Cell	Error Code(s)	N/A	All
Delta	'DELTA'	Cell	Error Code(s)	N/A	All
Stat Priority	'S'	Cell	Priority	N/A	All
Rejected	'Rejected'	Cell	Result	N/A	All
Cancelled	'Cancelled'	Cell	Result	N/A	All
Dutpatient	'S'	Row		N/A	SGAH CHEM HOLD
No Sample	'E172'	Cell	Error Code(s)	N/A	All
Above Assay RNG	'E521'	Cell	Error Code(s)	N/A	All
CRIT	'CRIT'	Cell	Error Name(s)	N/A	All
QC	'BRQC'	Row		N/A	All
Stago QC OUT	'AC'	Row		N/A	Connection Testing,GEC CHEM & COAG HOLD,GEC COAG HOLD,
Stago Numeric Errors Codes	'2' or '5' or 'DELTA'	Cell	Error Code(s)	N/A	Connection Testing,GEC CHEM & COAG HOLD,GEC COAG HOLD,
Stago Alpha Errors Codes	'AA' or 'AH' or 'Al' or '	Cell	Error Code(s)	N/A	Connection Testing,GEC CHEM & COAG HOLD,GEC COAG HOLD,
Stago QNS	'6' or 'AE' or 'AF' or 'A	Cell	Error Code(s)	N/A	Connection Testing,GEC CHEM & COAG HOLD,GEC COAG HOLD,
Stago Assay RNG	'3' or '4' or '8'	Cell	Error Code(s)	N/A	Connection Testing,GEC CHEM & COAG HOLD,GEC COAG HOLD,
JA Hold	'Correlation' or 'Refra	Cell	Error Code(s)	N/A	SGAH Second Level Review HOLD, SGAH URINALYSIS HOLD, WA
USPG	'Refractometer'	Cell	Result	N/A	SGAH Second Level Review HOLD, SGAH URINALYSIS HOLD, WA
Result Run Workspace	"	Cell	Result	N/A	All
Urine QC Expired/Out	'Fail' or 'QC Time Out	Row		N/A	SGAH Second Level Review HOLD, SGAH URINALYSIS HOLD, WA
For Path Review	'Review' or 'TEA' or '	Cell	Error Code(s)	N/A	GEC HEME HOLD, Hematology Workspace, SGAH HEME HOLD, WA
Hemo HOLD	'DIFF' or 'MORPH' or	Cell	Error Code(s)	N/A	GEC HEME HOLD, Hematology Workspace, SGAH HEME HOLD, WA

Non-Technical SOP

Title	Data Innovations Instrument Manager	
Prepared by	Robert SanLuis	Date: 7/11/2012
Owner	Robert SanLuis	Date: 3/12/2013

Laboratory Approval						
Print Name and Title	Signature	Date				
Refer to the electronic signature page for approval and approval dates.						
Local Issue Date:	Local Effective Date:					

Review:						
Print Name	Signature	Date				

TABLE OF CONTENTS

1.	PURPOSE	2
2.	SCOPE	2
3.	RESPONSIBILITY	2
4.	DEFINITIONS	2
5.	PROCEDURE	3
6.	RELATED DOCUMENTS	18
7.	REFERENCES	19
8.	REVISION HISTORY	19
9.	ADDENDA AND APPENDICES	19

1. PURPOSE

To describe the processes associated with the use of Instrument Manager (IM) to manage specimens and result release to into the Sunquest (SQ) Laboratory system.

2. SCOPE

Instrument Manager functions to provide connectivity between instrumentation and the laboratory information system (LIS). IM provides the ability to review multiple instruments and work areas at one time. IM utilizes rules-based decision processing via graphical interface to release results without technical intervention which provides technical staff additional time to attend to the true exceptions.

3. RESPONSIBILITY

Knowledge of IM is the responsibility of all laboratory technical staff.

4. **DEFINITIONS**

Instrument Manager (IM) – computer application to manage laboratory processes, instrument interfaces, and deploy rules-based decision processing via graphical interface.

5. PROCEDURE

A. Log on to Instrument Manager



If the program is not open double click on the icon on the desktop. (*Note: A popup window may state unknown publisher. Click Run.*)

First time users will enter their Quest employee ID number then click You will then be asked to establish a password. It is recommended to keep SunQuest and Instrument Manager passwords in sync.

Once your password is established you will Logon with the above established user name and password to gain access to the system.

B. Security

You are responsible for results release under your code. See below to change your password on demand.



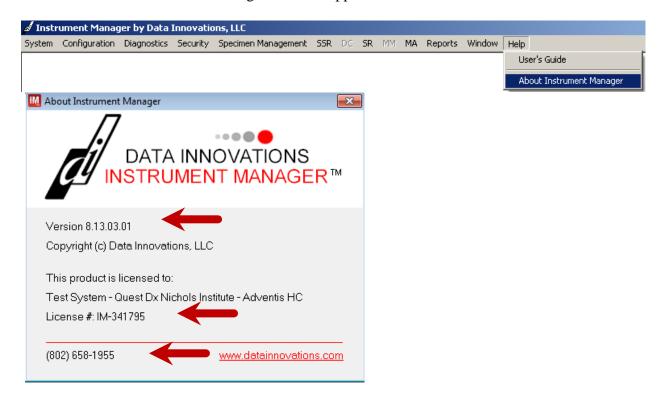
To maintain system security logoff under system as demonstrated.



Note: Auto-logoff: will automatically logoff users from Instrument Manager after a defined period of inactivity. The timer is currently set to 60 minutes

C. Help

The About Instrument Manager under the help menu will provide required information when calling customer support.



D. System menu



System Status

The status of interfaces should be on all the time for the following:

Qmgr Purge!

PurgeSpecimen Routing ArchiveCENTAURS

CENTAURW

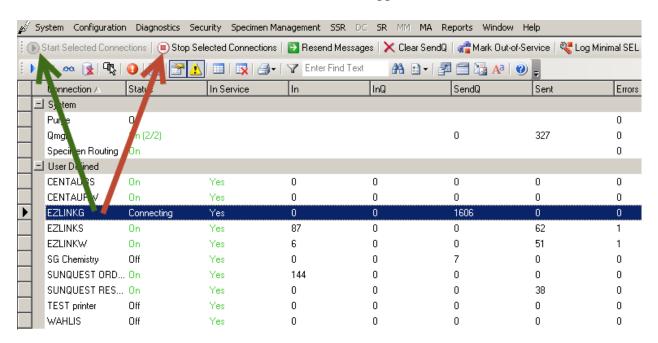
EZLINKG

Germantown Emergency Center

EZLINKS EZLINKW STAGO-GS1 STAGO-SS1 STAGO-SS2 STAGO-WS1 STAGO-WS2 IRIS1S IRIS1W **SUNQUEST ORDERS** SUNQUEST RESULTS **GEC HEME Counter** SGAH HEME Counter 1 SGAH HEME Counter 2 WAH HEME Counter 1 WAH HEME Counter 2 SYSMEX-GEC

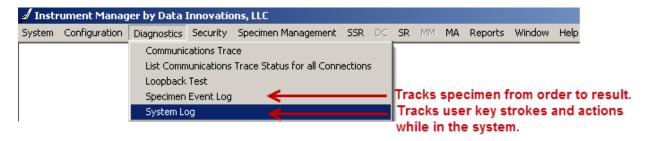
SYSMEX-SG SYSMEX-WAH

Note the below screen shot demonstrates EZLINKG at Germantown is not working. It is trying to connect unsuccessfully. You can attemp to repair the connection - click on the connection then select **STOP**/once stopped then **START** selected connection.



E. Diagnostics menu

Troubleshooting – staff will use this infrequently with IT support direction. Arrows below denote key logs utilized to capture all actions within the system.



F. Specimen Management Menu

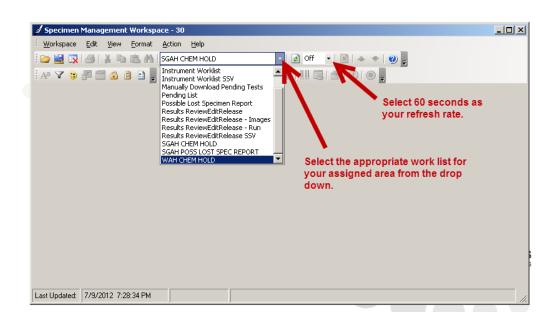


SM Workspace is the default window for technical staff. This is where specimen results are reviewed, rejected, and/or released.

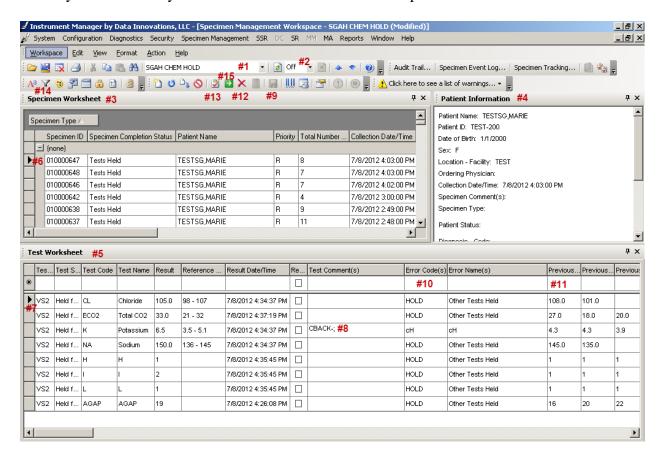
- Click on SM Workspace Your default screen will appear. The first time you log in it is blank because you have not selected a default worklist.
- Select your default site specific (SGAH, WAH or GEC) worklist (CHEM HOLD, COAG HOLD, or CHEM & COAG HOLD)
- Set a 60 second screen refresh rate.

See Example Below:





Below you will find key areas of interest denoted with description.



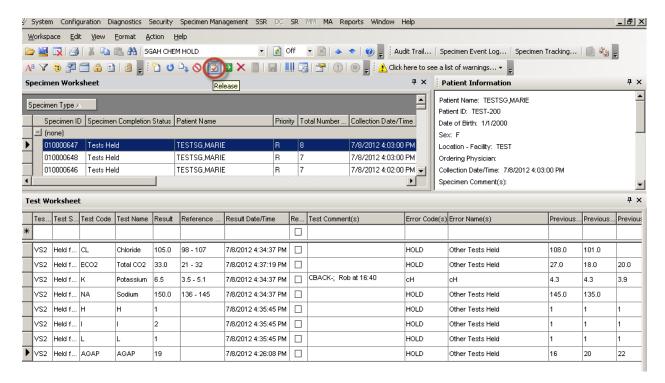
ITEM	DESCRIPTION	FUNCTION	ON					
#1	Work List	Site	Chemistry	mistry Coagulation		n Combined		Quality Control
		GEC	GEC CHEM HOLD	GEC COAG HOLD		GEC CH COAG H		GEC QC LIST
		SGMC	SGAH CHEM HOLD	SGAH COAG HOLD		SGAH C & CO HOL	AG	SGAH QC LIST
		WAH	WAH CHEM HOLD	WAH COAG HOLD		WAH CHEM & COAG HOLD		WAH QC LIST
		Site	Urinalysis	Co		Combined Quali		ity Control
		SGMC	SGAH URINALYS	SIS HOLD	N/A			H QC LIST
		WAH	WAH URINALYS	IS HOLD	N/A			QC LIST
		Site	Hematology		Combined		Quality Control	
		GEC	GEC HEME HOLD		N/A			N/A
		SGMC	SG HEME HOLD			N/A		N/A
		WAH	WAH HEME HOL	D		N/A		N/A

ITEM	DESCRIPTION	FUNCTION
#2	Screen Refresh	The Refresh Rate is how frequently the computer looks for new data.
	Rate	Selections are OFF, 30s, 60s, 120s, and 300s.
		The Refresh Rate should generally be set to 60s.
		If you have a particularly complex result to review you can toggle the
		setting to OFF. If the setting is OFF the screen will not refresh
		automatically which could affect turnaround time negatively.
#3	Specimen Worksheet	List of specimens to review before result release.
#4	Patient Information	This panel displays patient demographic information on the selected patient.
#5	Test Worksheet	Displays the results of the selected patient.
#6	Selected Patient	The arrow designates the patient being evaluated and acted on.
#7	Selected Test Result	The arrow indicates the current test being evaluated. The test is CL run on VS2 with result of 105.0 and held of the critical high Potassium.
#8	Critical	The critical result is flagged with cH and CBACK-; appends for documentation of the call.
#9	Save Changes	Save changes after entering test comments so they will not be lost. If the screen refreshes you will be asked 'do you want to save changes'. Responding <i>yes</i> to the save request will save your work but not release it.
#10	Error Code	The Error Code or flag is what holds a sample for review. The name of the error is listed in the adjacent cell. Additional information may also be provided to assist in evaluating the specimen results.
#11	Previous Results	If available, previous results will be listed. Please note that delta flags are triggered at certain intervals thus the difference may exceed the delta range but the time for the flag to trigger has elapsed.
#12	Reject Result	The Red rejects results you do not want to release. You can select individual results to reject or groups of results by depressing the Shift or Ctrl key in combination with the mouse. Always evaluate and reject before you release.
#13	Release Results	The clipboard with the check mark allows you to release results to Sunquest. SQ requires results to be delivered in neat packets. Therefore, you must evaluate results and reject everything except that which you want sent to the patients chart. Do not send duplicate results - SQ gets confused.
#14	Filter	The filter will allow you to add or remove a filter from the current Work List (#1 Above) you are viewing. For example, the default Work List only shows "Tests Held" for review. If you click on the filter you can remove a filter and see both held for review and complete.
#15	Send to Host	Selected results may be resent to the host Sunquest. This is most effective if you have a single result that did not cross for some reason; such as, using a comment without appropriate format or mistype of a canned comment.

G. Result Evaluation Process

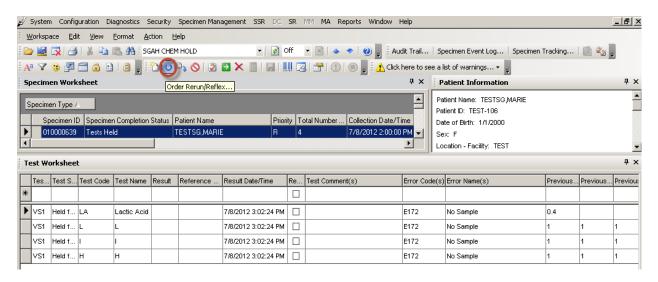
Example 1

- 1. Review results for errors, deltas, criticals, and HIL flags.
- 2. Only issues noted is a critical K of 6.5. Result called and read back (CBACK-;) by Rob at 16:40.



Example 2

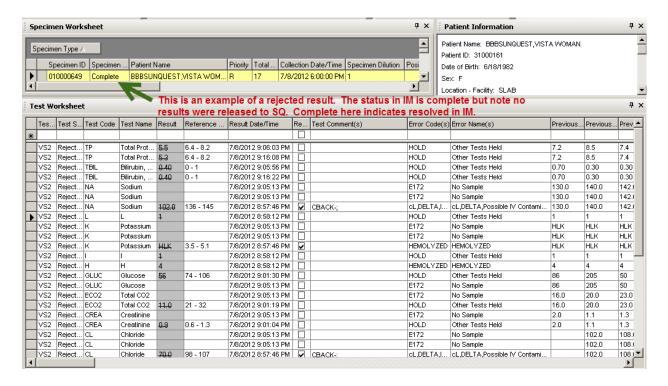
- 1. Review results for errors, deltas, criticals, and HIL flags.
- 2. Error noted (E172) no sample detected.
- 3. Since only LA is ordered check the sample and order rerun.
- 4. Reject × the bad results.



Example 3

On evaluation of the below results the entire result set was rejected.

Note: Rejecting a result in IM does **NOT** cancel the test in SQ. Test cancellation is a separate process in SQ requiring specific documentation per applicable procedure.



Note: For a calculation to work all components of the calculation must be present. Review results for 'Unable to Calculate' errors. To get the calculation to fire rerun all components required for the calculation.

Example 4

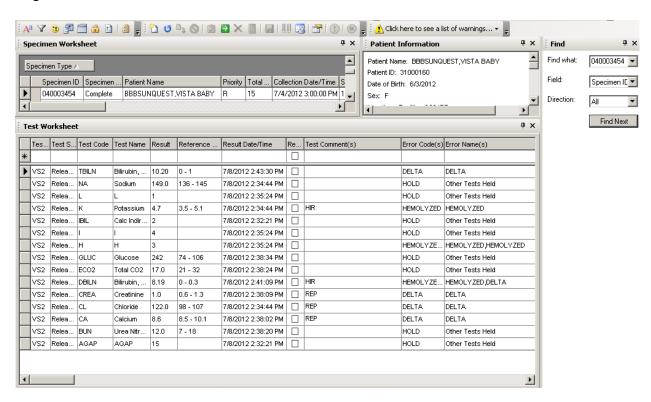
Comment format is critical to properly file the result in SQ.

English Text Codes are acceptable and the prefered method for result comments.

Note-1: The format is slightly different in that the (-) is appended by SQ. Review the format utilized in the screen captures below.

Note-2: Free text comment must be proceeded by (;). Remember the (-) is already appended.

English Text: HIR and REP



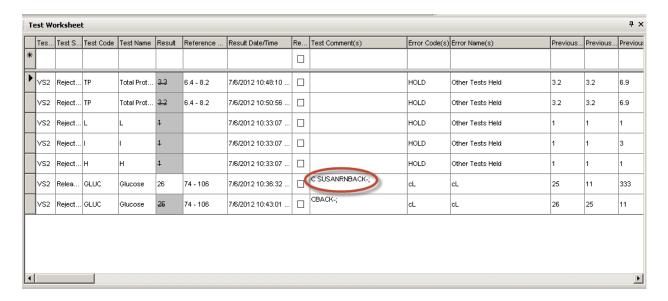
English Text-English Text: CBACK-; SUZIE RN AT 2020-REP

	Tes	Test S	Test Code	Test Name	Result	Reference	Result Date/Time	Re	Test Comment(s)	Error Code(s)	Error Name(s)	Previous	Previous	Prev
ŧ														
	VS2	Relea	TP	Total Prot	3.2	6.4 - 8.2	7/6/2012 9:12:18 PM			HOLD	Other Tests Held	6.9	7.1	7.1
	VS2	Reject	TP	Total Prot	3.2	6.4 - 8.2	7/6/2012 9:21:03 PM		Repeat Rejected	HOLD	Other Tests Held	3.2	6.9	7.1
	VS2	Reject	TP	Total Prot	3.2	6.4 - 8.2	7/6/2012 9:12:18 PM		Repeat Rejected	HOLD	Other Tests Held	6.9	7.1	7.1
	VS2	Relea	L	L	1		7/6/2012 8:50:31 PM			HOLD	Other Tests Held	1	1	1
	VS2	Relea	ı	ı	1		7/6/2012 8:50:31 PM			HOLD	Other Tests Held	1	3	1
	VS2	Relea	н	н	1		7/6/2012 8:50:31 PM			HOLD	Other Tests Held	1	1	1
	VS2	Reject	GLUC	Glucose	11	74 - 106	7/6/2012 9:15:54 PM		Repeat Rejected	cL,DELTA	cL,DELTA	11	333	58
	VS2	Reject	GLUC	Glucose	11	74 - 106	7/6/2012 9:15:54 PM		Repeat Rejected	cL,DELTA	cL,DELTA	11	333	58
	VS2	Relea	GLUC	Glucose	11	74 - 106	7/6/2012 8:53:42 PM		CBACK-; SUZIE RN AT 2020-REP	cL,DELTA	cL,DELTA	333	58	61

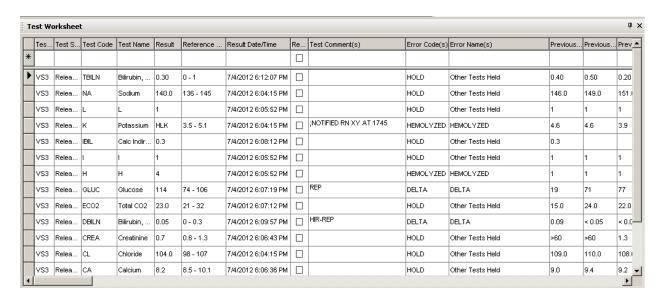
orm revised 3/31/00

Title: Data Innovations Instrument Manager

The below typo will cause the result to **NOT** file in SQ. You would need to correct the comment in OEM.



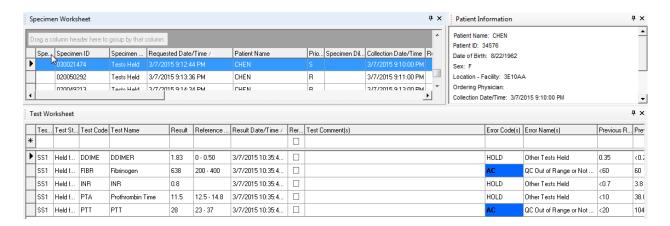
The below comments are entered correctly.



Example 5

Review results for QC failures

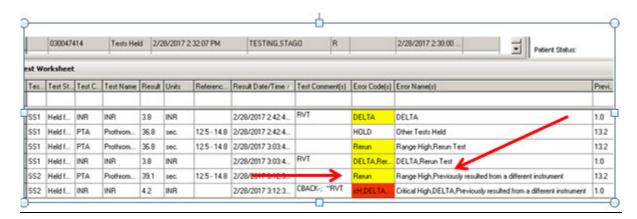
- 1. Error noted (AC) means "QC Out of Range or Not Done Check Instrument Status"
- 2. Reject the bad results (FIBR and PTT). Release the DDIMER, INR, AND PTA only
- 3. Check the instrument for QC issues and troubleshoot. Rerun samples with bad results once QC for FIBR and PTT are in range.



Example 6

Review of results with "Previously Resulted from a Different Instrument" error

- 1. DI will display an error and HOLD the results whenever a specimen or two specimens with the same accession numbers are run on two different instruments from the same class (for example, Vista 1 and Vista 2, Xpand 1 and Xpand 2, Stago 1 and Stago 2, Sysmex 1 and Sysmex 2)
- 2. Check SQ to see if the test has already been resulted. If resulted, then reject the rerun. If the first result has not been resulted, then select which run to release and reject the other run. Do not release both results from Instrument 1 and Instrument 2 to SQ as the first result will be overwritten by the second result



Title: Data Innovations Instrument Manager

H. Patient and Order Management



Select Patient and Order Management to look up previous results, order tests, and print results (downtime use only).

Note: Patient reports should only be printed from SQ for distribution to providers. The print feature is utilized to create preliminary reports for downtime purposes only or for internal use only.

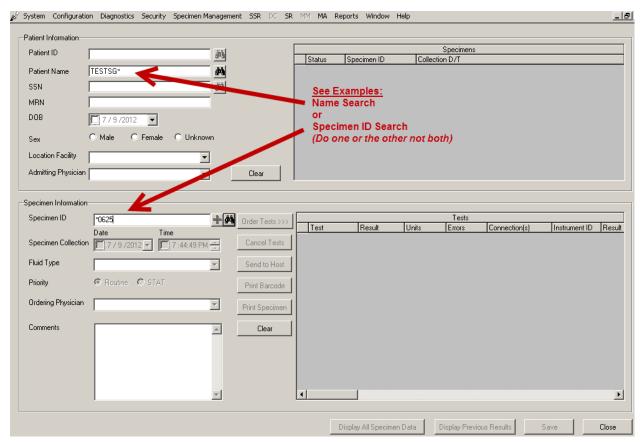
You can perform exact match searches or wild card searches.

Wild Card Searches

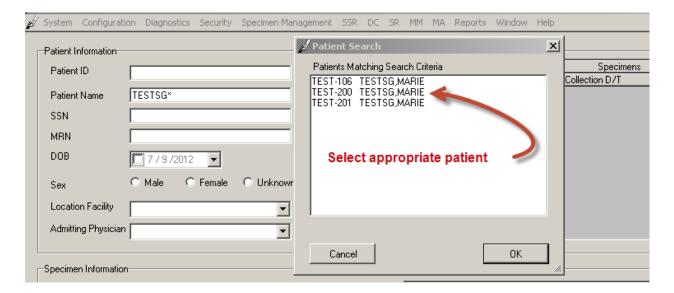
Patient name field type the search criteria, part of last name, followed by a wild card (*).

Specimen ID field type the wild card (*) followed by part of the specimen ID number.

Example Wild Card Searches



Result of Patient Name search

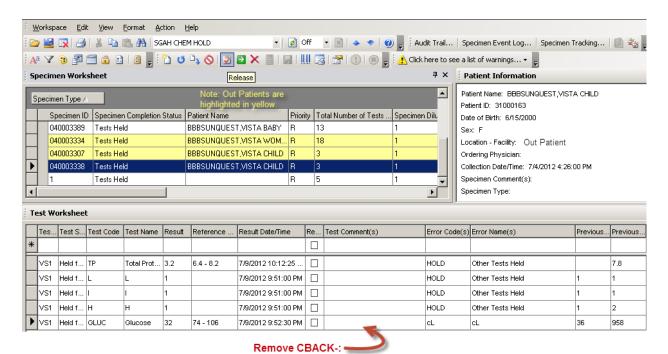


I. Out Patient Call Back List

Flag an Out-Patient for "Call Back" by removing the "CBACK-;" for the test comment field in IM.

When the result is released the Call Back List is automatically updated.

Example: Call Back



For an Out Patient Location removing CBACK-: automatically sends the result to the call back list.

TIT TEATSON 2/2

J. Tests Requiring Special Handling/Programming

Due to multiple fluid types on the same accession number special consideration must be given to CRCL and GTT testing. These tests should be manually programmed on the instrument utilizing the following format:

Program the accession number + TEST
CRCL - Example
F3200 UCRR
F3200 CREA
GTT
F3201 GT0
F3201 GT1
F3201 GT2
F3201 GT3

Results will need to be entered manually in MEM.

K. Start Holding All Results

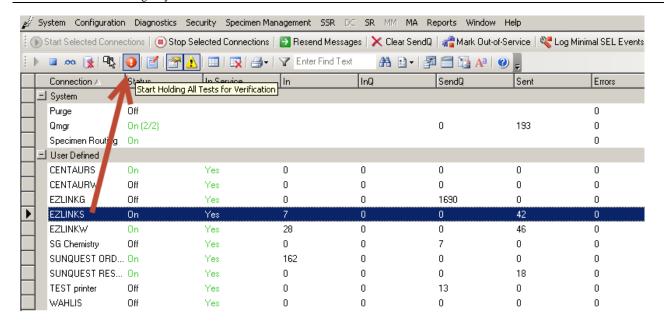
If there is a suspected problem with Auto-verification there is a command to Immediately Stop Auto-Verifying Results. If the need arises to STOP Auto-Verification do so, then immediately:

- Notify Lab Management (Supervisor/Director/Admin On-Call).
- Notify other system laboratories.
- Complete a QV Form.
- Begin releasing results manually.

Go to the System-Status screen.

Select the appropriate interface (example. ELINKS or EZLINKW)

Select Start Holding All Test For Verification



To turn the Auto – Verification back on, from the SM Workspace page

- Select Stop Holding Selected Tests for Verification
- Select the appropriate connection name
- **Stop Holding Selected Tests for Verification** Then select _[8]> Eormat Action Help Workspace Edit View 🗁 💹 🔯 | 🍶 | 👗 📭 🖺 👫 | SGAH CHEM HOLD ▼ | 2 60 Stop Holding Selected Tests for Verification Specimen Worksheet Patient Information Tests Scheduled to be Held $\,^{\,7}$ \times Patient Name Connection Name rag a column header here to group by that colum Patient ID: Spe... | Specimen ID | Specimen ... | Requested Date/Time | Patient Name Prio., Specim Date of Birth: Stop Holding Tests Sex: Location - Facility Ordering Physician: Collection Date/Time Specimen Comment(s): Specimen Type: Q

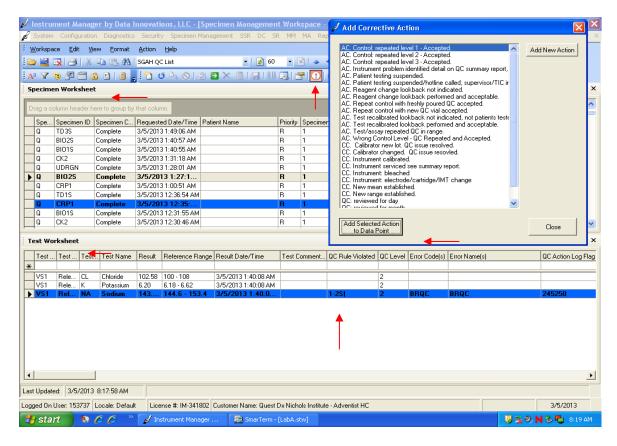
L. Quality Control:

The Data Innovation software evaluates each QC result against acceptable ranges and high lights the ones that violate the QC rules, in blue color. The DI software will use the 1-2s, 2-2s and 1-3s Statistical Process Control (SPC) rules to describe the extent of the failure. Before releasing the QC result which has violated the QC rule, a corrective action must be added to the failed QC. To add a corrective action to QC results,

- under Specimen Worksheet click on blue highlighted QC
- under **Test Worksheet** select the blue highlighted assay which has violated the OC rule
- QC Action Log icon gets activated

- select the appropriate action that has been (Not Will Be) taken to trouble shoot the failed QC
- click on Add Selected Action to Data Point

Release the QC result, the selected action will now migrate to Bio-Rad Unity Real Time.



When QC results fail, **stop the Auto-Verification immediately**. Once the QC is repeated and falls within acceptable ranges turn the Auto-Verification back on. Utilizing the process below, click on the designated icon, then select the connection name and designated test to stop holding:

To turn the Auto – Verification back on, from the SM Workspace page

- Select Stop Holding Selected Tests for Verification
- Select the appropriate connection name
- Then select Stop Holding Selected Tests for Verification

6. RELATED DOCUMENTS

OEM - On Line Entry Method, LIS procedure MEM - Manual Result Entry, LIS procedure Critical Values - Accepting Results in LIS, LIS procedure Correcting Results, LIS procedure Delta Check, QA procedure

7. REFERENCES

User Documentation, *Instrument Manager v8.12*, Data Innovations, INC.

8. REVISION HISTORY

Version	Date	Reason for Revision	Revised By	Approved By
000	3/12/2013	Update owner	A. Chini	R. SanLuis
		Section 5: Added process to reinstate Auto-		
		verification to item K. Added QC section (item L)		
001	3/18/2015		D.	R. SanLuis
		add Coag and GEC instruments, update work lists,	Concepcion	
		remove outdated calculation example, add Coag	L. Barrett	
		example		
		Section 6: add Delta Check		
		Footer: version # leading zero's dropped due to new		
		EDCS in use as of 10/7/13		
2	6/8/2016	Section 5: Add Iris (Urinalysis) processing through	D.	R. SanLuis
		DI	Concepcion	
			M. Sabonis	
3	8/1/2016	Header: Add other sites	D.	R. SanLuis
		Section 5: Add second level review for crystals	Concepcion	
4	5/18/2017	,	D.	R. SanLuis
		Update Iris QC, add example 6 (previously resulted	Concepcion	
		from different instrument error)	M. Sabonis	
		Section 6: Remove SOP numbers	L. Barrett	
		Section 9: Add addenda; Move Iris actions from		
		section 5, add Coag and Sysmex (Hematology)		
	0/15/0015	processing through DI	5	D G T :
5	9/17/2017	Addendum 3: add steps 11-19	D.	R. SanLuis
			Concepcion	

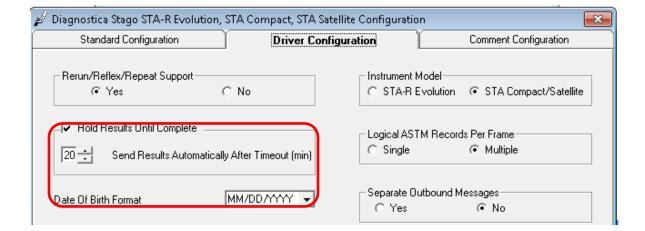
9. ADDENDA AND APPENDICES

- 1. Stago (Coagulation) Instrument Specific Actions
- 2. Iris (Urinalysis) Instrument Specific Actions
- 3. Sysmex (Hematology) Instrument Specific Actions

Addendum 1

Stago (Coagulation) Instrument Specific Actions

The DI Stago driver is set to collate all the coagulation tests on the same accession number until all the results have been completed within a set amount of time. For example, if the first test has been completed and the second test is still pending and the collation time has been exceeded, DI will release the first test as long as it does not have an error. This setting is at the Driver level.



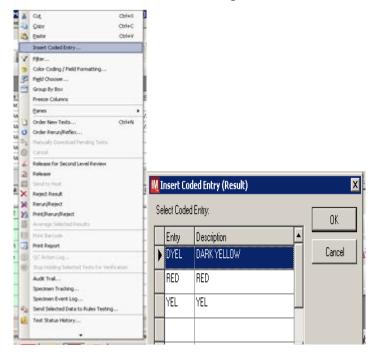
Addendum 2

Iris (Urinalysis) Instrument Specific Actions

A. General Information

1. Color

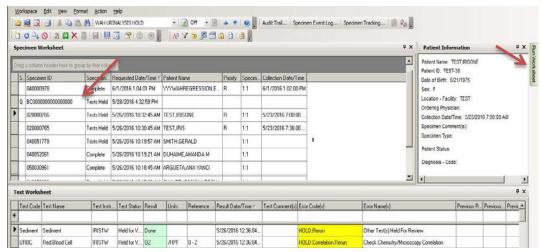
With the cursor in the result cell, right click \rightarrow Insert Coded Entry \rightarrow Click on desired result \rightarrow Ok. Result in Cell will update.



2. View Sample Reruns and Release Results

With the Iris you may have to rerun a sample. Reruns will be indicated in the Error Codes column. The "Urinalysis Hold" SM workspace is designed to display a tab on the right side of the workspace called "Run Worksheet". This is where the original and the rerun results will display.

a. To display both results, click on specimen ID and then use mouse to hover over or click on the green "Run Worksheet" tab



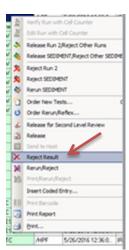
SOP ID: SGAH.L49 SOP version # 6 CONFIDENTIAL: Authorized for internal use only.
Page 21 of 38

Addendum 2 (continued)

b. Both runs display.



c. To release a run, place your cursor in one of the result cells for the run you want to release and right click. Select appropriate option.



- d. To close the Run Worksheet for the specimen that you are viewing, click on a cell in either the specimen or test worksheet.
 - ** DO NOT CLICK ON THE X in the Run Worksheet as this will cause the Run Worksheet tab to be removed from viewing.

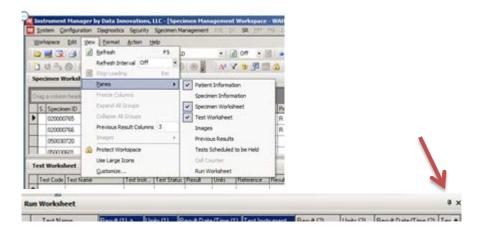


<u>Note</u>: To re-display the RUN WORKSHEET (green tab) - From the main banner select **View→Panes→ Run Worksheet.**

Addendum 2 (continued)

When the run Worksheet displays, click on minimize it.

the **push pin** icon to



B. Iris (Urinalysis) Manual Refractometer testing

1. If the specific gravity is >1.035, then the result is suppressed and an error message will alert tech to perform a manual refractometer to determine specific gravity.



2. If manual refractometer result is >1.035, then enter result into DI as >1.035

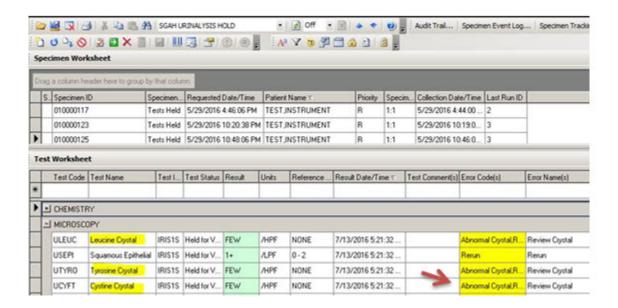
C. Iris (Urinalysis) Pyridium (Orange colored urines)

- 1. If urine is orange, you will see error code "HOLD, Color"
- 2. Verify that urine is truly orange, if urine is orange then
 - a. Report out Color, Appearance and Microscopic (if applicable).
 - b. Remove and replace the rest of the Chemistry results with COLINT. With cursor in result cell, right click → Insert Coded Entry→click on COLINT→OK. Result in result cell updates.

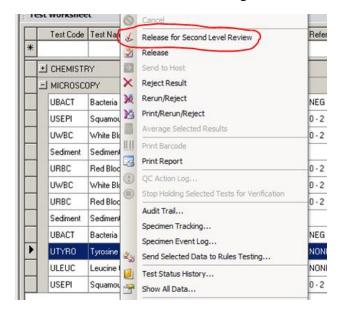
Addendum 2 (continued)

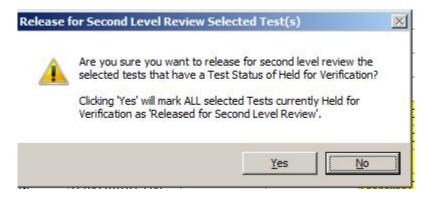
D. Abnormal Crystals for Second Level Review

1. If an abnormal crystal is present in the urine, you will see error code of "Abnormal Crystal"



- 2. Verify the abnormal crystal with a second technologist
- 3. If both are in agreement, then follow the steps below to release the result for Second Level Review, then to LIS
 - a. First Tech Within the DI Urinalysis workspace, select the abnormal crystal and release it for Second Level Review. Click YES on the Release for Second Level Review window. The result will go to the Second Tech for review





b. Second Tech – Go to the Second Level Review HOLD, then release the abnormal crystal. The result will then go to LIS

