

**TRAINING UPDATE**

**Lab Location:** SGMC and WAH      **Date Implemented:** 11.28.2017  
**Department:** Processing      **Due Date:** 12.18.2017

**DESCRIPTION OF PROCEDURE REVISION**

**Name of procedure:**

Validation of Outpatient Orders and Outpatient Laboratory Requisition Audit Form

**Description of change(s):**

1. Updated form
2. Updated format of procedure for clarity
3. Added steps for verification of orders

## Electronic Document Control System



**Document No.:** SGAH.CS01[5]

**Title:** Validation of Outpatient Orders

**Owner:** LESLIE BARRETT

**Status:** INWORKS

**Effective Date:** 21-Dec-2017

**Next Review Date:**

Non-Technical SOP

<b>Title</b>	<b>Validation of Outpatient Orders</b>	
<b>Prepared by</b>	Leslie Barrett	Date: 12/1/2008
<b>Owner</b>	Stephanie Codina	Date: 11/16/2017

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

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

Document:SGAH.CS01.[5] Status:INWORKS,Effective:12/21/2017, Check Version Before Use

Form revised 3/31/00

**TABLE OF CONTENTS**

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

**1. PURPOSE**

To define the process for verifying that laboratory orders written on paper requisitions and presented to the outpatient laboratory are entered into the laboratory computer system accurately. This process is intended to improve customer satisfaction since incomplete or inaccurate ordering can lead to recalling the patient and/or re-drawing specimens.

**2. SCOPE**

This procedure applies to any laboratory order received in the outpatient laboratory on a paper requisition and manually ordered in the laboratory computer system.

**3. RESPONSIBILITY**

Client services staff members will verify orders were accurately transcribed into the laboratory computer system.

**4. DEFINITIONS**

None

**5. PROCEDURE**

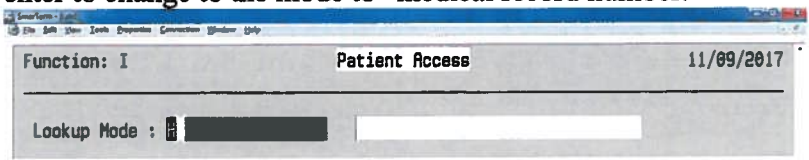
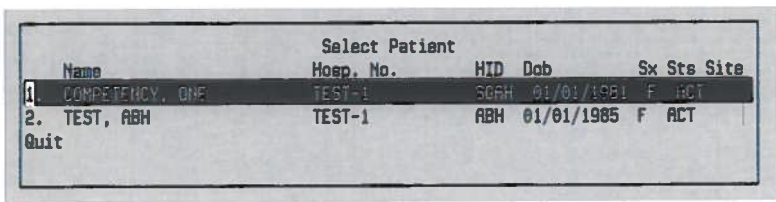
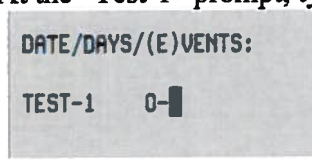
Step	Action
1	Staff assigned to the outpatient laboratory will perform this audit. Audits are performed as time permits throughout the day and documented on the form daily. Orders must be verified so omissions and errors can be corrected as quickly as possible.
2	An aliquot label from each accession number entered will be placed on the patient's facesheet at the time of order.

Document: SGAH.CS01[5] Status: INWORKS, Effective: 12/21/2017, Check Version Before Use

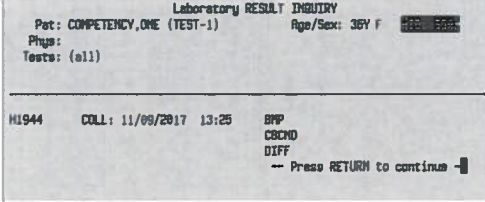
00/1/17 14:45:11:00

Step	Action
3	<p>The person performing venipuncture on the patient will review the facesheet and orders prior to specimen collection to ensure the following are correct.</p> <ul style="list-style-type: none"> <li>A. Patient's full name matches on the order, facesheet, and labels.</li> <li>B. Patient's birthdate matches on the order (if present), facesheet, and labels.</li> <li>C. Patient's medical record number matches on the order (if present), facesheet, and labels.</li> <li>D. The tests ordered match the tests requested on the requisition.</li> </ul> <p>Correct any issues <b>before</b> drawing the patient.</p>

**Verification Process**

Step	Action
1	Access Sunquest SmarTerm function "I" (Patient Access).
2	<p>At the "Lookup Mode" prompt, press the up arrow "↑" and type "H" then enter to change to the mode to "medical record number."</p> 
3	At the "Lookup Mode: Hosp. No.:" prompt, type the patient's medical record number and press "enter."
4	<p>Identify the intended patient from the popup list. Move the cursor to highlight the intended patient and press "enter" to select the patient.</p> 
5	At the "Date, Days, Events:" prompt, press enter to default the current day.
6	<p>At the "Test-1" prompt, type "O-" and press the "enter" key to display orders.</p> 

Document:SGAH.CS01[5] Status:INWORKS,Effective:12/21/2017, Check Version Before Use

Step	Action
7	<p>Compare the information displayed on the screen to the facesheet and manual requisition. Ensure the following.</p> <ul style="list-style-type: none"> <li>A. Patient name must match on the order, facesheet, and computer.</li> <li>B. Patient birthdate must match on the order (if available), facesheet, and computer.</li> <li>C. Patient medical record number must match on the order (if available), facesheet, and computer.</li> <li>D. Ensure all tests on the order were entered into the computer.</li> <li>E. Ensure each test is ordered correctly in the computer.</li> </ul> 
8	<p>Correct any errors or omissions noted as soon as possible. Document issues, corrective actions, and notifications on the back of the Outpatient Laboratory Requisition Audit form.</p> <p>If the patient is recalled, document the issues on a quality variance form and notify a supervisor. Leave the quality variance form at the front desk with the order until the patient returns. When the patient returns, document resolution on the QV form. The supervisor is responsible for ensuring follow up occurs.</p>
9	<p>At the end of the day, document the following information on the appropriate row of the Outpatient Laboratory Requisition Audit form.</p> <ul style="list-style-type: none"> <li>A. Total number of requisitions reviewed</li> <li>B. Number of requisitions without errors</li> <li>C. Number of requisitions corrected</li> <li>D. Reviewing Tech</li> </ul> <p>Verify that the details of any incorrect requisitions are completely documented on the back of the form.</p> <p>Check the appropriate column if the Outpatient Laboratory was closed.</p>
10	<p>The supervisor will review the audit form monthly and follow up with staff as indicated. The form will then be filed in the designated location.</p>

- 6. RELATED DOCUMENTS**  
 Outpatient Processing, Client Service procedure  
 Outpatient Laboratory Requisition Audit form (AG.F78)

Form rev. Issued 7/31/00

**7. REFERENCES**

None

**8. REVISION HISTORY**

Version	Date	Reason for Revision	Revised By	Approved By
000	12/7/2010	Section 5: A.7 Add documentation recorded on registration face sheet. B. Reassign second review Section 6: delete SOP numbers Section 9: add Audit Sheet	S. Khandagale	S. Khandagale
001	4/2/2012	Section 5: C.3.b Change PI form to Quality Variance form C.7 Add weekly review required by Supervisor/ designee & documentation.	S. Khandagale	S. Khandagale
002	8/14/2013	Section 3: clarify responsibility Section 5: add process if staffed by one person Section 6: move Audit form from Section 9	L. Barrett	S. Khandagale
003	8/28/2015	Section 5: A.4 specify LIS functions Footer: version # leading zero's dropped due to new EDCS in use as of 10/7/13	L. Barrett	S. Khandagale
4	11/16/17	Updated owner Header: Added WAH Section 5: Added detailed process for audit, added supervisor review. Section 6: Updated form, updated SOP list	SCodina	NCacciabeve

**9. ADDENDA AND APPENDICES**

None

Document: SGAH.CS01[5] Status: INWORKS, Effective: 12/21/2017, Check Version Before Use

Form revised 3/23/00

## Outpatient Laboratory Requisition Audit

Month:                      Year:

Date	Total Number of Reqs Reviewed	Number of Requisitions Without Error	Number of Requisitions Corrected (document details on back)	Check (✓) if Closed	Reviewing Tech
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					
26					
27					
28					
29					
30					
31					

Reviewed By: \_\_\_\_\_

Date: \_\_\_\_\_



