

## TRAINING UPDATE

**Lab Location:** GEC, SGMC & WAH  
**Department:** All staff

**Date Distributed:** 4/26/2018  
**Due Date:** 5/17/2018  
**Implementation:** 5/17/2018

### DESCRIPTION OF PROCEDURE REVISION

<b>Name of procedure:</b>	
<b>Cancelling Tests or Orders</b>	<b>SGAH.L39 v2</b>
<b>Description of change(s):</b>	
Sections 1,3: Added reordering	
Section 2: <b>Removed exception for duplicate orders</b> ( <i>must notify care-giver before cancelling as duplicate</i> )	
Section 4: Removed unnecessary acronym	
Section 5: <b>Added instructions to reorder testing</b> ( <i>Lab must re-order test for re-collection</i> )	
Section 6: Removed retired SOP	
<b>This revised SOP will be implemented on May 17, 2018</b>	

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

Non-Technical SOP

<b>Title</b>	<b>Cancelling Tests or Orders</b>	
<b>Prepared by</b>	Leslie Barrett, Marie Sabonis	Date: 2/17/2012
<b>Owner</b>	Robert SanLuis	Date: 2/17/2012

<b>Laboratory Approval</b>		
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:

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

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**1. PURPOSE**

To define the processes to cancel a laboratory order or test and specify criteria for ordering a re-collection.

**2. SCOPE**

This procedure applies to all laboratory orders and tests. Physician or nurse authorization or notification is required to cancel any order ~~with the exception of a duplicate order.~~

**3. RESPONSIBILITY**

All Laboratory staff must understand and adhere to this procedure for cancelling specimens and re-ordering testing.

**4. DEFINITIONS**

None

**5. PROCEDURE**

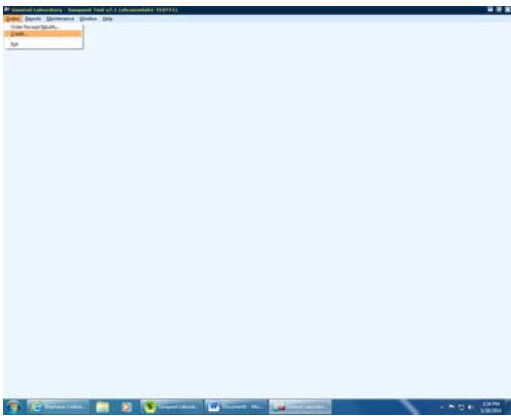
**General Process**

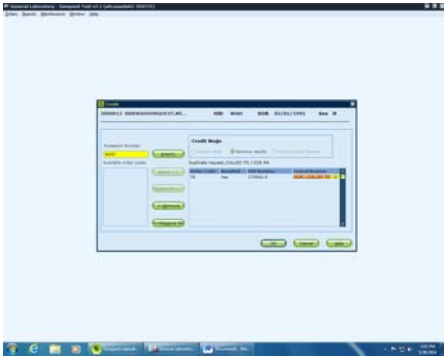
Step	Action
1	<b>Do not use this function if testing has been resulted.</b> Refer to procedure, "Credit without Removing Results."
2	Request that the nurse or provider cancel test orders that have not yet been collected in the Hospital Information System (HIS) if the testing is no longer needed/requested. A. Nurse-to-collect orders that have not been received in the laboratory will automatically cancel after 7 days. B. Orders cannot be cancelled in the HIS if they have been electronically received in the laboratory system.

Form revised 3/31/00

Step	Action
3	If a nurse or physician requests that the laboratory cancel a specimen that has been electronically received in the laboratory but not tested, obtain the following information: <ul style="list-style-type: none"> <li>A. Patient name</li> <li>B. Patient medical record number</li> <li>C. Test(s) to be cancelled</li> <li>D. Date and time of the order</li> <li>E. Reason for cancelling</li> <li>F. First and last name of the requestor</li> </ul>
4	If a test or order is cancelled due to a specimen labeling or integrity problem, then <ul style="list-style-type: none"> <li>A. Notify the nursing unit or provider and document the name</li> <li>B. Cancel the original order</li> <li>C. Reorder testing</li> </ul> <p style="margin-left: 40px;"><b>Note:</b> If provider or nurse does NOT want testing reordered, then include this in the cancel comment.</p>
5	Follow one of the procedures below to cancel. <ul style="list-style-type: none"> <li>A. Use GUI instructions to cancel in Sunquest GUI.</li> <li>B. Use SmarTerm instructions to cancel in Sunquest SmarTerm.</li> </ul>

### GUI Instructions

Step	Action
1	Access Sunquest GUI function, "General Laboratory."
2	Select the "Orders" box and select "Credit" from the dropdown menu. <div style="text-align: center; margin: 10px 0;">  </div>
3	A credit screen will appear. Type the specimen accession number in the yellow box then click on the "inquiry" button.

Step	Action
4	The tests associated with the accession number you entered will appear in the “Available order codes” box. Highlight the test to be cancelled and click the “select” button. This will move the selected test to the right-hand side of the screen.
5	In the “credit mode” box, click the radial button to highlight “Remove results.”
6	<p>In the “Cancel reason” box, enter the reason for cancellation and who was notified.</p> <ul style="list-style-type: none"> <li>A. Enter the mnemonic for the reason code that corresponds to why you are cancelling the test. Refer to the “Sunquest Cancellation / Reschedule Reasons” addendum.</li> <li>B. Enter a hyphen and semi-colon “-;” after the mnemonic.</li> <li>C. Enter a comment, “Notified NAME.”</li> <li>D. Press the “tab” key.</li> <li>E. Example: DUPL-;Notified J.Doe, RN</li> </ul> 
7	Click the “OK” button.
8	<p>If the warning box, “The following orders have been resulted: Crediting the orders will remove the results. Do you wish to continue?” appears,</p> <ul style="list-style-type: none"> <li>A. For laboratory specimens, click “No” and use the procedure, “Credit without removing results.” <b>Never cancel a test that has been resulted.</b></li> <li>B. For microbiology specimens, verify that the only result entered is the source and click “Yes” to continue.</li> <li>C. For blood bank specimens, verify that the only result entered is the T&amp;S expiration date and click “Yes” to continue.</li> </ul>
9	<p>Reorder test per procedure “Order Entry”</p> <p><del>If the test or order was cancelled due to a specimen labeling or integrity problem, reorder the testing using procedure, “REI – Ordering Tests, Receiving Specimens, Reprinting Labels” (for SmarTerm) or “Order Entry” (for GUI).</del></p>
10	Write a PI/Variance form and attach a copy of the specimen label for any specimen that is cancelled due to incorrect labeling.

### SmarTerm Instructions

Step	Action
1	Access Sunquest SmarTerm function “OER.”
2	At the “Lookup Mode: Hosp No” prompt, type the patient’s medical record number and press “enter.”
3	Select the correct patient from the list of patient’s that appears.
4	At the “Date/Days/Events” prompt, type the date the specimen was cancelled. Alternatively, you can press return to autofill with the current date.
5	At the “Start time” prompt, type the time the specimen was cancelled. Alternatively, you can press return to autofill with the current time.
6	At the “Quit <Q> Cancel (C) Acc (#)” prompt, type C- followed by the specimen accession number and press enter. For example, C-F12345.
7	At the “Test-1” prompt, type mnemonic of the test to be cancelled.
8	<p>At the “Reason” prompt,</p> <ul style="list-style-type: none"> <li>A. Type the English text code (ETC) reason that corresponds to why the specimen is being cancelled. Refer to the “Sunquest Cancellation/Reschedule Reasons” addendum.               <ul style="list-style-type: none"> <li>a. Do not type a semi-colon “;” before the code.</li> <li>b. Do not freetext a reason.</li> </ul> </li> <li>B. The ETC will be followed by a dash and semi-colon “-;”</li> <li>C. Follow the -; with the first and last name of the person notified as well as the date and time of notification.</li> <li>D. Do not use commas “,” or special characters.</li> <li>E. For example: QNS-;Jane Doe 7/29/16 1351</li> </ul>
9	If additional tests need to be cancelled, enter them at the “TEST-2” and subsequent prompts. Press “enter” at this field to move to the next prompt.
10	At “Accept (A), Modify (M), Reject (R)” prompt, type “A” for accept then press the “return” key.
11	If the "RESULTS FILED. DELETE?" message displays, <b>stop and do not cancel the order</b> . Bring this order to the attention of the supervisor or group lead for resolution.
12	<a href="#">Reorder test per procedure “Order Entry”</a>
13	Write a PI/Variance form and attach a copy of the specimen label for any specimen that is cancelled due to incorrect labeling.

**Orders that are cancelled by a reference laboratory**

Step	Action
1	Document the cancellation on the reference test log.
2	Determine if we have an acceptable sample for testing and resubmit as indicated.
3	If we do not have an acceptable sample, notify the provider's office or nursing unit and cancel the testing per instructions above.

**6. RELATED DOCUMENTS**

Credit Without Removing Results, LIS procedure  
~~REI - Ordering Tests, Receiving Specimens, Reprinting Labels~~  
 Order Entry  
 Sunquest Cancellation / Reschedule Reasons (AG.F164)

**7. REFERENCES**

None

**8. REVISION HISTORY**

Version	Date	Reason for Revision	Revised By	Approved By
		Supersedes SOP L054.000		
000	8/9/16	Header: add other sites Section 5: Updated format and wording for clarity. Removed references to Sunquest function CR and Crediting. Added requirement to reorder testing when the order is cancelled due to specimen labeling or integrity issues and to write a PI/Variance when cancelled due to labeling issues. Added GUI instructions. Section 6: remove retired SOP Section 9: move form to section 6 Footer: version # leading zero's dropped due to new EDCS in use as of 10/7/13	L Barrett S Codina	R SanLuis
1	4/18/18	Sections 1,3: Added reordering Section 2: Removed exception for duplicate orders Section 4: Removed unnecessary acronym Section 5: Added instructions to reorder testing Section 6: Removed retired SOP	L Barrett	R SanLuis

**9. ADDENDA AND APPENDICES**

None