TRAINING UPDATE

Lab Location:	SGMC and WAH	**Date Implemented:**	5.29.2018
Department:	Processing	**Due Date:**	6.12.2018

DESCRIPTION OF PROCEDURE REVISION

Name of procedure:

Specimen Processing Sendouts

Description of change(s):

- This procedure was broken into multiple procedures for ease of use.
  - Tracking was broken into a separate procedure
  - Overdue log was broken into a separate procedure
  - The Microbiology ROB procedure will be retired; the contents are included in this procedure

- No additional content changes were made

Electronic Document Control System

Quest Diagnostics

Document No.: SGAH.S33[3]

Title: Specimen Processing Sendouts

Owner: LESLIE BARRETT

Status INWORKS

Doc Effective Date: 24-Jun-2018

Next Review Date:

Non-Technical SOP

Title	Specimen Processing Sendouts	
Prepared by	Lori Loffredo	Date: 12/14/2010
Owner	Stephanie Codina	Date: 5/24/2018

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

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1. PURPOSE

This procedure describes the preparation of specimens for sending to reference laboratories for testing.

2. SCOPE

This procedure applies to any specimen that will be sent to a reference laboratory for testing.

3. RESPONSIBILITY

All staff assigned to Specimen Processing must understand and perform these duties when referring specimens to reference laboratories.

4. DEFINITIONS

Irreplaceable specimen: A specimen that has been obtained by invasive means that is not easily obtained or replaced, i.e. CSF, body cavity fluids, fine needle aspirations, surgical biopsies, tissue, etc.

5. PROCEDURE

Step	Action
1	All tests must be received in Sunquest before beginning this process.

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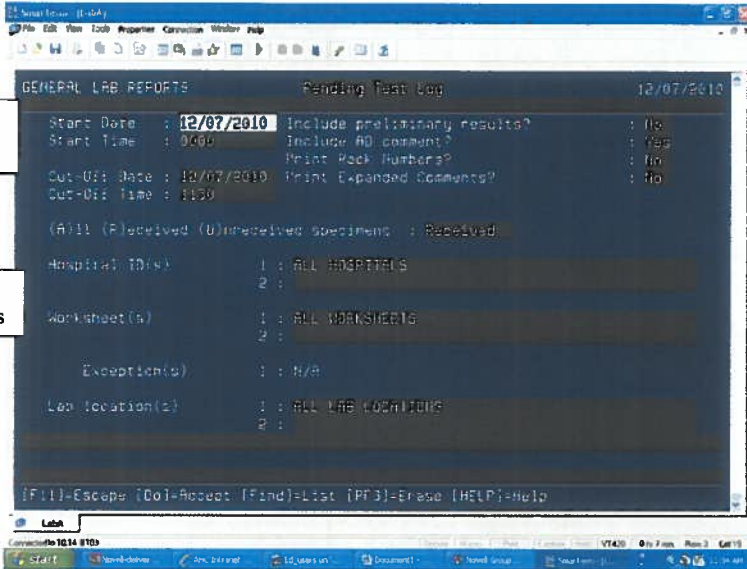
Step	Action
2	Aliquot non-micro specimens in plastic transport vials and label per procedure aliquoting specimens. A. Access test information using Sunquest function MIQ or contact Chantilly client service as needed to verify you have the correct specimen type and sufficient volume. DO NOT send out specimens that do not meet the test requirements. Note: If the specimen was drawn from a neonate and it does not meet volume requirements, notify the patient care area that the specimen is less than the minimum volume for the test. If the provider insists, send the specimen to Quest to see if testing can be completed but document the name of the person that was notified the specimen volume may be insufficient. B. Write the client number on any specimen going to Quest. a. 25224 WAH non-micro b. 23494 WAH micro c. 25225 SGMC non-micro d. 23495 SGMC micro e. 25225 ARH non-micro f. 23495 ARH micro C. Write the storage conditions on the tube if the specimen must be stored refrigerated or frozen.
3	Separate irreplaceable specimens from replaceable ones. A. Immediately place each irreplaceable specimen in a designated purple bag (one specimen per bag). B. Mark the appropriate storage condition (refrigerated, frozen, room temperature) on each bag. Refer to MIQ for test details. C. Irreplaceable specimens will remain and be shipped in the purple bags. D. Purple bags are placed in a bin labeled, "IRREPLACEABLE SPECIMENS" until send out processing begins.
4	Separate specimens by destination laboratory (Quest, WAH, SGAH or State of Maryland).

Print Pending Log

Step	Action
1	Print a pending log for each batch of specimens being referred to Quest Diagnostics for testing. The pending log will provide additional information required for test submission such as specimen source, specimen volume, and other information required for specific tests.
2	Access Sunquest SmarTerm.
3	At the "Function" prompt, type "PL" for pending log.

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Step	Action
4	At the "Printer" prompt, type the number of the printer to which you would like to print the report.
5	The following screen will appear. Answer the following prompts: A. At the "Start Date" prompt, type "T-3" and press enter. B. At the "Start Time" prompt, type "0001" and press enter. C. Press enter at the following prompts to accept the default responses. a. Cut-off date b. Cut-off time c. Include preliminary results d. Include AD comments e. Print rack numbers f. Print expanded comments D. At the "All, Received, Unreceived" prompt, type "R" and enter for received specimens. E. At the "Hospital ID" prompt, type the hospital for which you are pulling the report. A new report must be generated for each location. a. SGAH = Shady Grove Medical Center b. WAH = Washington Adventist Hospital c. ARHT = Adventist Rehabilitation Hospital at Takoma Park d. ARHR = Adventist Rehabilitation Hospital at Rockville F. At the "Worksheet(s)" prompt, type "REFOE" for "Result at order entry." G. At the "Lab location(s)" prompt, press enter to default "all lab locations." H. At the "Accept, Modify, Reject" prompt, type "A" for accept and press enter. I. The pending log will print.

Default is current date. Change to T-3.

Default is "ALL" for Hospitals and Worksheets

Step	Action
6	Review the pending log to determine if there are any missing results/responses for "result at order entry." Resolve pending tests as required. There are no pending tests if the report is blank. Orders with missing results will not transmit to Quest. A. Access Sunquest GUI function, "Order Entry." B. At the "Lookup by" prompt, select "Accession Number" from the dropdown menu. C. At the "Value" prompt, type in the accession number to be edited. D. Click the "Search" button. E. Follow the prompts and result any missing information.

Create a pending ROB

Step	Action
1	Create a pending ROB (Reference Order Batch) list to ensure that every order is addressed. This step must be completed prior to creating an ROB batch list.
2	Access Sunquest SmarTerm.
3	At the "Function" prompt, type "ROB" and press enter.
4	At the "Tech" prompt, press enter to default your tech code and name.
5	At the "Interface number" prompt, type "601" and press enter. This number is associated with our sites (SGAH, WAH, and ARH).
6	A menu will appear. Select option "6" for "Reports" and press enter.
7	At the next menu, select option "1" for "Pending List" and press enter.
8	At the "Hospital ID" prompt, type one of the following and press enter. A new report must be generated for each location. A. WAH for Washington Adventist Hospital. B. SGAH for Shady Grove Medical Center. C. ARHT for Adventist Rehabilitation Hospital at Takoma Park. D. ARHR for Adventist Rehabilitation Hospital at Rockville. Notes: 1. Do not pull for location ARH. ARH will list specimens for both ARHT and ARHR. 2. Do not pull automatic batches. Create a different batch for each site.
9	At the "Patient event type(s)" prompt, press return to default "All."
10	At the "Department, Worksheet, Lab Location, or All" prompt, press "enter" to default "department."

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Step	Action
11	For NON-MICRO processing, enter ALL of the following at the "Department(s)" prompt: A. Department (s): **RLR** for "reference lab refrigerated" and press enter. B. Department (s): **RLT** for "reference lab room temp" and press enter. C. Department (s): **RLZ** for "reference lab frozen" and press enter. D. Department (s): **RLO** for "reference lab other" (this is used for miscellaneous tests) and press enter. For MICRO processing, at the "Department (s):" prompt, enter **MC** for "microbiology" and press enter.
12	At the "Cutoff Collect Date" prompt, press enter to default the current date.
13	At the "Cutoff Collect Time" prompt, press enter to default the current time.
14	At the "Include unreceived specimen" prompt, press enter to default no.
15	At the "Accept, Modify, Reject" prompt, type "A" for accept and press enter.
16	At the "Printer" prompt, type the number of the printer to which you want the report to print and press enter.
17	Review the ROB pending log and obtain all specimens. Check each one to ensure you can account for every specimen.

Create a Batch List

Step	Action
1	Access Sunquest SmarTerm.
2	At the "Function" prompt, type "ROB" and press enter.
3	At the "Tech" prompt, press enter to default your tech code and name.
4	At the "Interface number" prompt, type "601" and press enter. This number is associated with our sites (SGAH, WAH, and ARH).
5	A menu will appear. Select option "1" for "Create Batch" and press enter.
6	At the "Hospital ID" prompt, type one of the following and press enter. A new report must be generated for each location. A. WAH for Washington Adventist Hospital. B. SGAH for Shady Grove Medical Center. C. ARHT for Adventist Rehabilitation Hospital at Takoma Park (WAH). D. ARHR for Adventist Rehabilitation Hospital at Rockville (SGMC).

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Step	Action
7	At the "Automatic or Manual Create" prompt, type "M" for manual and press enter.
8	At the "Department, Worksheet, Lab Location, or All" prompt, press "enter" default "department."
9	For NON-MICRO processing, enter ALL of the following at the "Department(s)" prompt: A. Department (s): **RLR** for "reference lab refrigerated" and press enter. B. Department (s): **RLT** for "reference lab room temp" and press enter. C. Department (s): **RLZ** for "reference lab frozen" and press enter. D. Department (s): **RLO** for "reference lab other" (this is used for miscellaneous tests) and press enter. For MICRO processing, at the "Department (s):" prompt, enter **MC** for "microbiology" and press enter.
10	At the "Accept, Modify, Reject" prompt, type "A" for accept and press enter.
11	At the "Print Batch List" prompt, type "Y" for yes and press enter.
12	At the "Printer" prompt, type the number of the printer to which you want the report to print and press enter.
13	Compare the accession numbers, patient names, and patient medical record numbers on the specimen tubes to the accession numbers, patient names, and patient medical record numbers listed on the batch list. Ensure all specimens are accounted for. Review one specimen at a time. If microbiology specimens are removed from bags, only remove plates for one patient at a time.
14	Ensure all specimens have a client number on the label. A. 25224 WAH non-micro B. 23494 WAH micro C. 25225 SGMC non-micro D. 23495 SGMC micro E. 25225 ARH non-micro F. 23495 ARH micro

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Step	Action
15	Modify the batch to remove specimens if any of the following occur: A. You are unable to locate a specimen. B. The provider cancelled a test. C. An inappropriate test is ordered. Note: Removing a test from the batch does not cancel the test. You must cancel the test per procedure. **Modify a batch:** A. Access Sunquest SmarTerm. B. At the "Function" prompt, type "ROB" and press enter. C. At the "Tech" prompt, press enter to default your tech code and name. D. At the "Interface number" prompt, type "601" and press enter. This number is associated with our sites (SGAH, WAH, and ARH). E. A menu will appear. Select option "2" for "Modify Batch" and press enter. F. At the "Batch date" prompt, type the date on which the batch was created and press enter. G. At the "Batch number" prompt, type the batch number that is located on the Order Batch Listing and press enter. H. At the "Automatic or Manual Modify" type "M" for manual and press enter. I. At the "Accept, Modify, Reject" prompt, type "M" for modify and press enter. J. At the "Accession #" prompt, type the accession number to be modified and press enter. K. At the "Order code" prompt, type the order code to be removed. Note: the order codes will display in step J above. L. The test name will display. M. Under the test name, type a hyphen "-" and press the enter key. N. The comment, "Order removed from batch" will display. O. At the "Put into a pending pool" prompt, type "Y" and press enter. Note: If you say "N" at this prompt, the test will not qualify for a subsequent order batch when created. P. Repeat steps J-N for any additional accessions that need to be modified. Q. At the "Print batch list" prompt, type "Y" for yes and press enter. R. At the "Printer" prompt, type the number of the printer to which you want the report to print and press enter.

Queue Batch for Transmission

Step	Action
1	When you queue the batch for transmission, A. The orders in the batch will electronically transmit to Quest Diagnostics Chantilly. B. The packing list that is used to ship specimens will print.
2	Access Sunquest SmarTerm.
3	At the "Function" prompt, type "ROB" and press enter.
4	At the "Tech" prompt, press enter to default your tech code and name.
5	At the "Interface number" prompt, type "601" and press enter. This number is associated with our sites (SGAH, WAH, and ARH).
6	A menu will appear. Select option "3" for "Queue Batch" and press enter.
7	At the "Batch date" prompt, type the date on which the batch was created and press enter.
8	At the "Batch number" prompt, type the batch number that is located on the Order Batch Listing and press enter.
9	At the "Accept, Modify, Reject" prompt, type "M" for modify and press enter.
10	At the "Print Packing List?" prompt, type "Y" for yes and press enter.
11	At the "Number of copies" prompt, type "2" and press enter. A. One copy if sent with the specimens. B. The second copy is saved on site in the designated area for 2 weeks.
12	At the "Printer" prompt, type the number of the printer to which you want the report to print and press enter.
13	**For Microbiology Specimens only: Perform FES per procedure.**
14	Package the specimens and the packing list in the appropriately colored bag. A. Irreplaceable specimens are segregated in a purple bag and the appropriate storage conditions are checked on the front of the bag. Never place a purple bag inside another bag. B. Refrigerated specimens (RLR) go in a blue bag in the designated refrigerator. C. Room temperature specimens (RLT) go in an orange bag at the designated room temperature location. D. Frozen specimens (RLZ) go in a yellow bag in the designated freezer. E. Microbiology specimens (MC) go in a regular, biohazard bag in the incubator.

Faxback Log

Step	Action
1	Quest Diagnostics Chantilly lab will generate a faxback log when quest has an order for testing (we generated and transmitted the order) but the specimen has not been received. The faxback log is printed daily and must be reviewed and cleared by processing staff members.
2	Compare the fax time stamp with the "transit or sent" time for each accession in question. A. If the two times are within 2 hours, it is possible that the specimens are still enroute to Chantilly. No further actions need to be taken. B. If the two times are more than 2 hours apart, perform an investigation. a. Determine if the shipping conditions for the specimen (refrigerated, frozen, room temperature) to determine where the specimen was stored and verify that the specimen was, in fact, sent to Chantilly. b. Determine if the specimen appears on a previous manifest (ie if the specimen was electronically submitted twice). c. Send additional sample if a suitable specimen is available and the original cannot be located. d. Cancel the test order(s) as applicable.
3	Communicate resolution with the Chantilly laboratory and document the resolution (full name of person notified with date and time of notification) directly on the faxback log.
4	Retain the faxback logs in the designated location for 1 month.

6.   RELATED DOCUMENTS

Specimen Receipt and Processing
Aliquoting Specimens
MIQ 1– Maintenance Inquiry, Test Code Lookup
Cancelling Tests or Orders
FES, Processing Microbiology Orders

7.   REFERENCES
None

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8. REVISION HISTORY

Version	Date	Reason for Revision	Revised By	Approved By
		Supersedes SOPs - SGAH/WAH.S04.000, SGAH/WAH.S05.000, WAH.S18.000, SGAH.S19.000, SGWAH.S017.001		

000	12/5/2013	Section 4: added facility codes
		Section 5: Item A.3 added location ARH
		  Item C - added instructions for ROB pending logs and handling of ARH samples
		  C.I - added steps to pull pending log in ROB
		  C.II, step 11 - use manual batch creation
		  Item D - Deleted TIBC, FERTN & Prometheus samples from Tracking List for Send Out Tests, Non-Quest or Between Sites.
		Footer: version # leading zero's dropped due to new EDCS in use as of 10/7/13
			N Maskare, S Khandagale	S Khandagale

1	4/7/16	Section 4: add irreplaceable and replaceable
		Section 5:
		  Item A & C.V: add purple bag process
		  Item D.II – update tracking template codes
		Section 9: add purple bag
			L Barrett S Khandagale	S Khandagale

2	5/24/18	Updated owner Header: Added WAH Section 5: Moved tracking to its own procedure. Moved overdue log to its own procedure. Updated format and wording for clarity. Section 6: Updated SOP titles	SCodina	NCacciabeve

9. ADDENDA AND APPENDICES
A. Purple Bag

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Purple Bag for Irreplaceable Specimen
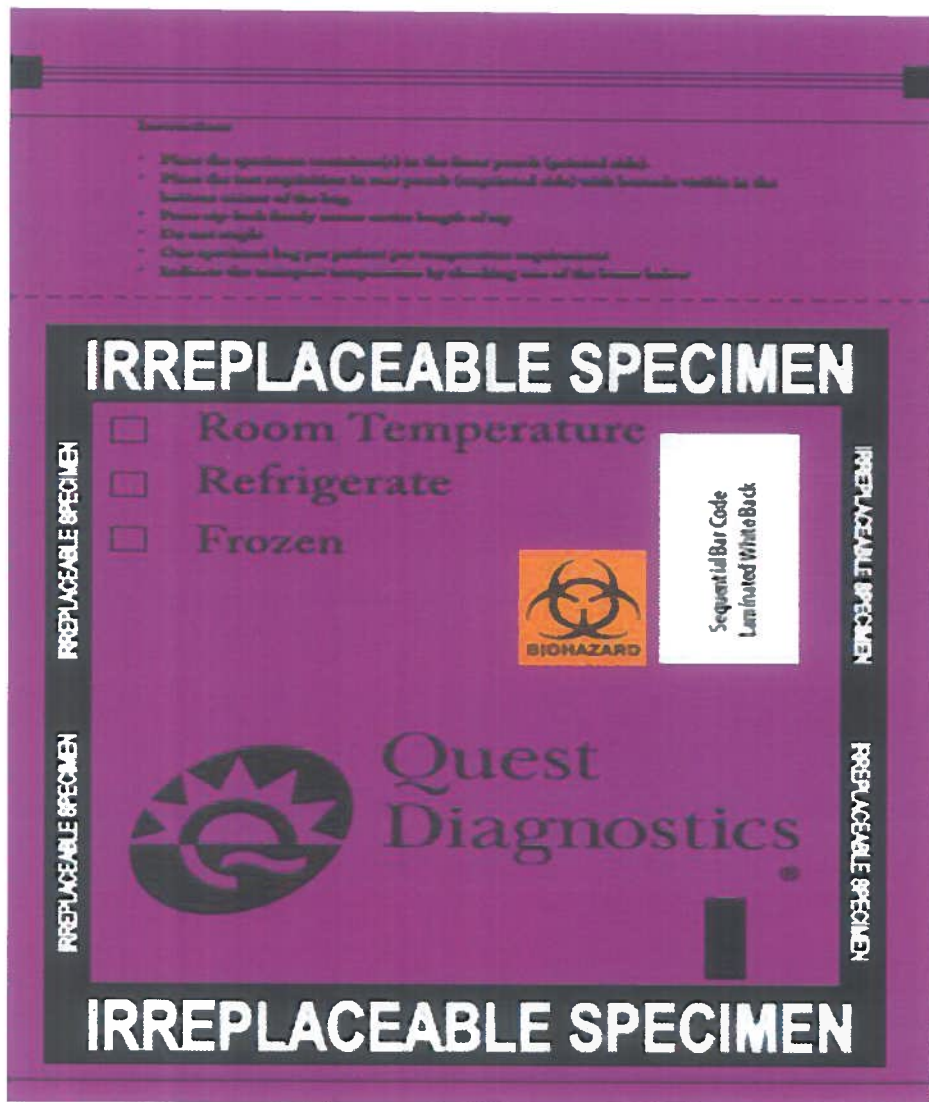
Examples of irreplaceable specimens:

Tissue biopsy or bone marrows
Fine needle biopsies/aspirations
Body cavity fluids (synovial, pleural, peritoneal, ascites)
Products of Conception (for chromosome analysis)
Lavages, washings, or brushings
Cerebrospinal Fluid (CSF)
Cord blood
Stones
Meconium (for drug screening)