

TRAINING UPDATE

Lab Location: GEC
Department: Core Lab

Date Distributed: 7/17/2018
Due Date: 7/31/2018
Implementation: 7/24/2018

DESCRIPTION OF PROCEDURE

Name of procedure:	
Tracking Specimens Between AHC Lab Sites SGAH.S999 v0	
Description of change(s):	
<p>This is a new SOP that will replace the current LIS SOP titled “TR- Tracking.” Key elements that you must understand:</p>	
1	Reads and understands SOP, “Tracking Specimens Between AHC Lab Sites.”
2	Verbalizes understanding that specimens must be received in Sunquest and aliquotted into an appropriate transport tube before beginning this procedure.
3	Demonstrates how to access test information using Sunquest function MIQ.
4	States when specimens are added to a tracking list (when they are sent to another AHC site for testing).
5	Properly create a batch of routine specimens for transport. A. Identify appropriate template code based on location the specimens are shipping from and to. B. Properly scan specimens to the batch. C. Appropriately review and address specimens on the “Specimens missing from list” report.
6	List which specimens can be transported STAT without approval and state the process for obtaining and documenting approval of a STAT transport.
7	Demonstrate how to create a manual batch for a malaria smear. Identify what test is entered for malaria smears (EXAM).
8	Demonstrate how to add or delete a specimen from a batch that has been created.
9	Properly print a transport list for the batch or manual batch you created.
10	Properly identify the following track status codes: <ul style="list-style-type: none">• U (unreceived specimen)• R (received specimen that is not on a batch)• Q (queued for transit)• TR (in transit)• F (received at the final destination)
<p>This SOP will be implemented on July 24, 2018</p>	

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

Non-Technical SOP

Title	Tracking Specimens Between AHC Lab Sites	
Prepared by	Stephanie Codina	Date: 6/15/2018
Owner	Stephanie Codina	Date: 6/15/2018

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

To define the process for tracking specimens between laboratory sites in the AHC system (SGMC, WAH, and GEC) for testing.

2. SCOPE

This procedure applies to any specimen that will be sent between laboratory sites in the AHC system (SGMC, WAH, GEC) for testing.

3. RESPONSIBILITY

All specimen processing and GEC staff must understand and adhere to this procedure for sending specimens to another laboratory site for testing.

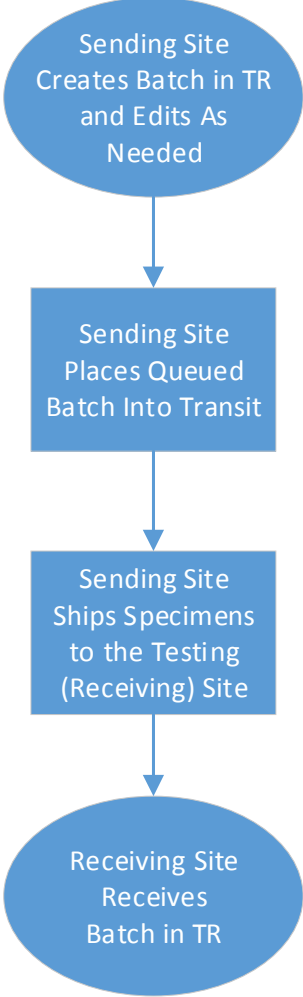
4. DEFINITIONS

NA

5. PROCEDURE

Step	Action
1	All tests must be received in Sunquest before beginning this process.
2	Aliquot the specimens in plastic transport vials and label per procedure "Aliquoting Specimens." A. Access test information using Sunquest function MIQ. DO NOT send out specimens that do not meet the test requirements. B. Write the destination on the tube (SGMC or WAH) if the specimen is going to another AHC lab for testing. C. Write the storage conditions on the tube if the specimen must be stored refrigerated or frozen. For blood bank specimens, ship in the original tube. Verify labeling is correct before sending.

Form revised 3/31/00

Step	Action
3	Specimen processing is responsible for tracking specimens that are sent to another laboratory for testing prior to courier pickup. Courier schedules are published in procedure, "Courier Schedule and Communication."
4	<p>The general process to track specimens is as follows:</p>  <pre> graph TD A([Sending Site Creates Batch in TR and Edits As Needed]) --> B[Sending Site Places Queued Batch Into Transit] B --> C[Sending Site Ships Specimens to the Testing (Receiving) Site] C --> D([Receiving Site Receives Batch in TR]) </pre>

Create a Batch in Sunquest

Step	Action
1	Access Sunquest SmarTerm.
2	At the "function" prompt, type "TR" and enter to access the specimen tracking functions.
3	At the "?" prompt, type "1" and enter to create a batch.

Form revised 3/31/00

Step	Action																								
4	<p>At the “Template code” prompt, type in the appropriate template code and press enter.</p> <p>SGMC</p> <table border="1" data-bbox="407 375 1430 638"> <thead> <tr> <th data-bbox="407 375 570 411">Code</th> <th data-bbox="570 375 1430 411">Transport To/From</th> </tr> </thead> <tbody> <tr> <td data-bbox="407 411 570 447">SLAB</td> <td data-bbox="570 411 1430 447">Specimens from SGMC to WAH</td> </tr> <tr> <td data-bbox="407 447 570 520">SMAN</td> <td data-bbox="570 447 1430 520">Specimens with manual tracking from SGMC to WAH (Use this code for malaria smears.)</td> </tr> <tr> <td data-bbox="407 520 570 556">SMGEC</td> <td data-bbox="570 520 1430 556">Specimens with manual tracking from SGMC to GEC</td> </tr> <tr> <td data-bbox="407 556 570 638">SREF</td> <td data-bbox="570 556 1430 638">Specimens with manual tracking from SGMC to any reference lab</td> </tr> </tbody> </table> <p>WAH</p> <table border="1" data-bbox="407 711 1430 934"> <thead> <tr> <th data-bbox="407 711 570 747">Code</th> <th data-bbox="570 711 1430 747">Transport To/From</th> </tr> </thead> <tbody> <tr> <td data-bbox="407 747 570 783">WLAB</td> <td data-bbox="570 747 1430 783">Specimens from WAH to SGMC</td> </tr> <tr> <td data-bbox="407 783 570 856">WMAN</td> <td data-bbox="570 783 1430 856">Specimens with manual tracking from WAH to SGMC (Use this code for malaria smears.)</td> </tr> <tr> <td data-bbox="407 856 570 934">WREF</td> <td data-bbox="570 856 1430 934">Specimens with manual tracking from WAH to any reference lab</td> </tr> </tbody> </table> <p>GEC</p> <table border="1" data-bbox="407 1010 1430 1161"> <thead> <tr> <th data-bbox="407 1010 570 1045">Code</th> <th data-bbox="570 1010 1430 1045">Transport To/From</th> </tr> </thead> <tbody> <tr> <td data-bbox="407 1045 570 1119">GLAB</td> <td data-bbox="570 1045 1430 1119">Specimens with manual tracking from GEC to SGMC (Use this code for malaria smears.)</td> </tr> <tr> <td data-bbox="407 1119 570 1161">GIC</td> <td data-bbox="570 1119 1430 1161">Microbiology specimens from GEC to SGMC</td> </tr> </tbody> </table>	Code	Transport To/From	SLAB	Specimens from SGMC to WAH	SMAN	Specimens with manual tracking from SGMC to WAH (Use this code for malaria smears.)	SMGEC	Specimens with manual tracking from SGMC to GEC	SREF	Specimens with manual tracking from SGMC to any reference lab	Code	Transport To/From	WLAB	Specimens from WAH to SGMC	WMAN	Specimens with manual tracking from WAH to SGMC (Use this code for malaria smears.)	WREF	Specimens with manual tracking from WAH to any reference lab	Code	Transport To/From	GLAB	Specimens with manual tracking from GEC to SGMC (Use this code for malaria smears.)	GIC	Microbiology specimens from GEC to SGMC
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5	At the “Accept, modify, reject” prompt, type “A” for accept and press enter.																								
6	At the “Cut-off date” prompt, press enter to default the current date.																								
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8	<p>At the “Batch comment” prompt,</p> <ul style="list-style-type: none"> A. Press enter to leave the field blank. B. Type a semi-colon “;” followed by a short free text comment if indicated. 																								

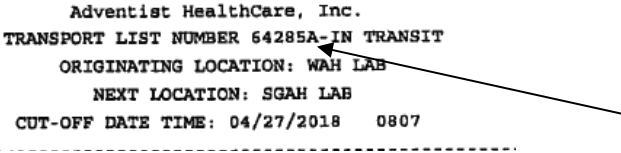
Step	Action
9	Scan each specimen into the tracking list. <ul style="list-style-type: none"> A. At the “Accession number” prompt, barcode the accession number from the lab label of the specimen. B. At the “Test” prompt, <ul style="list-style-type: none"> a. Press “Enter” if all tests on the accession number are accounted for. b. Enter the test code and press “enter” if only one or part of the tests on the accession number will be tracked. C. At the “Final Destination” prompt, press enter to accept the default location. D. Place the specimen in the transfer rack in the order in which it was scanned. Continue this process with each specimen that will be shipped.
10	At the “Accept, Modify, Reject” prompt, type “A” for accept and press enter.
11	At the “Printer” prompt, type the number of the printer to which the report should print and press enter.
12	At the “Use host” prompt, press the enter key to default the batch entry.
13	Two forms will print. <ul style="list-style-type: none"> A. The “TRANSPORT LIST NUMBER-<i>Batch #-IN TRANSIT</i>” list will print. This lists all specimens that have been tracked in the batch. B. A “SPECIMEN MISSING FROM LIST NUMBER <i>Batch#</i>” list will autogenerate and print if the computer identifies any specimens that have been received in the lab and are eligible for tracking, but were not added to the list.
14	Package specimens for shipping. <ul style="list-style-type: none"> A. Obtain the specimens to be sent. B. Match each specimen to the “TRANSPORT LIST NUMBER-<i>Batch #-IN TRANSIT</i>” list to ensure all are present. Add specimen to or delete specimens from the list as needed. C. Place specimens in a transport rack in the order they are listed on the form. D. Place the rack in a biohazard bag for transport.
15	If a “SPECIMEN MISSING FROM LIST NUMBER <i>Batch#</i> ” report generated, review and reconcile specimens on the list. Create a separate batch to ship specimens if indicated.

Create a Manual Batch for STAT or Problem Specimens

Step	Action
1	Manual tracking is used to track individual specimens without creating a batch. This function is used for STAT and problem specimens.
2	<p>Physician or supervisor approval is required prior to sending STAT specimens to another laboratory.</p> <ul style="list-style-type: none"> A. Obtain approval from the treating physician prior to sending STAT specimens. Record the name of the physician giving approval. B. Type and screen specimens are generally not transported STAT. The patient will be transferred if transfusion is needed. Patient transfer is generally faster than specimen transport. C. The following tests may be sent STAT without approval: <ul style="list-style-type: none"> a. PCT (procalcitonin) b. NH3 (ammonia) c. ACOHG (carboxyhemoglobin arterial) d. VCOHG (carboxyhemoglobin venous) e. MAL (malaria smear)
3	Call to request a STAT courier pickup. Document the call and the priority on the courier log.
4	Access Sunquest SmarTerm function "TR" for track.
5	At the "?" prompt, type "1" and enter to create a batch.
6	<p>At the "Template code" prompt, type in the appropriate template code and press enter.</p> <ul style="list-style-type: none"> A. SMAN (SGMC to WAH) B. WMAN (WAH to SGMC) C. GLAB (GEC to SGMC)
7	At the "Accept, modify, reject" prompt, type "A" for accept and press enter.
8	At the "Batch Comment" prompt, type the name of the person who approved STAT transport, if applicable, then press enter.
9	At the "Accession number" prompt, scan the LIS barcode label of the specimen and press enter.
10	<p>At the "Test" prompt, type the LIS test code to be sent and press enter. For malaria smears, type "EXAM."</p> <p>Repeat this step for each additional test on that accession number or press enter to return to the accession number prompt.</p>

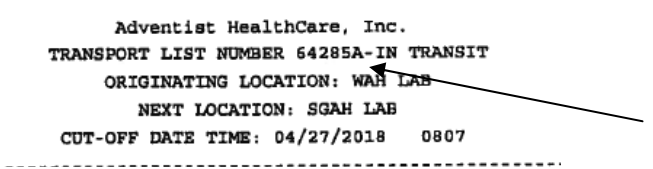
Step	Action
11	At the “Final destination” prompt, type the lab to which the specimen will be sent, then press enter. <ul style="list-style-type: none"> • WLAB (WAH) • SLAB (SGMC) • GLAB (GEC)
12	The “Accession number” prompt will appear again. Repeat steps 9-11 if additional accessions will be tracked. Press enter to advance to the next prompt.
13	At the “Accept, modify, reject” prompt, type “A” for accept and press enter.
14	At the “Printer” prompt, type the number of the printer to which the report should print and press enter.
15	Package specimens for shipping. <ul style="list-style-type: none"> A. Obtain the specimens to be sent. B. Match each specimen to the “queued for transit” list to ensure all are present. C. Add specimen to or delete specimens from the list as needed. D. Place specimens in a transport rack in the order they are listed on the form. E. Place the rack in a biohazard bag for transport.

Add Specimens To or Delete Specimens From a Batch

Step	Action
1	At the “Function” prompt, type “TR” for track and press enter.
2	At the “?” prompt, type “2” for “modify batch” and press enter.
3	At the “Batch number” prompt, type the batch number from the header of the TRANSPORT LIST NUMBER- <i>Batch #-IN TRANSIT</i> list and press enter. <div style="text-align: center; margin-top: 10px;"> <p>Adventist HealthCare, Inc. TRANSPORT LIST NUMBER 64285A-IN TRANSIT ORIGINATING LOCATION: WAH LAB NEXT LOCATION: SGAH LAB CUT-OFF DATE TIME: 04/27/2018 0807</p> <p>-----</p>  </div>
4	The originating, current, and next track locations will display. Press the enter key to accept the locations.
5	At the “Batch comment” prompt, press enter.
6	At the “Batch status (QT/TR/D):” prompt, press enter to default “Queued for transit.”

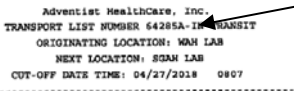
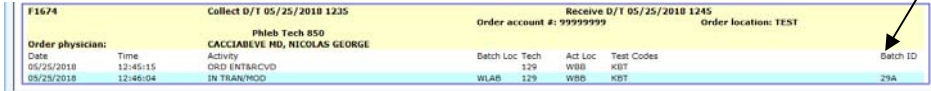
Step	Action
7	At the "Print" prompt, press enter.
8	At the "Sort" prompt, press enter.
9	At the "Accession number" prompt, A. To add an accession, type the accession number to be added and press enter. B. To delete an accession, type the minus sign (-) followed by the accession number and press enter. For example, -M12345 [enter].
10	The accession number prompt will display again. Add/delete another accession number or press enter to move to the next field.
11	At the "Accept, Modify, Reject" prompt, type "A" for accept and press enter.
12	At the "Printer" prompt, type the number of the printer to which the report should print and press enter.
13	At the "Use host" prompt, press the enter key to default the batch entry.
14	The TRANSPORT LIST NUMBER- <i>Batch #-IN TRANSIT</i> " list will print.

Print Transport List to Accompany Specimens

Step	Action
1	Place the batch into transit when the specimens are ready to ship (prior to the courier pickup time).
2	Access Sunquest SmarTerm function "TR."
3	At the "?" prompt, type "2" and press enter to modify a batch.
4	At the "Batch number" prompt, type the batch number from the "TRANSPORT LIST NUMBER- <i>Batch #-IN TRANSIT</i> " list and press enter. <pre style="text-align: center;"> Adventist HealthCare, Inc. TRANSPORT LIST NUMBER 64285A-IN TRANSIT ORIGINATING LOCATION: WAH LAB NEXT LOCATION: SGAH LAB CUT-OFF DATE TIME: 04/27/2018 0807 ----- </pre> 
5	The originating, current, and next track locations will display. Press the enter key to accept the locations.
6	At the "Batch comment" prompt, press enter.
7	At the "Batch status (QT/TR/D):" prompt, "TR" will default. Press enter to accept.

Step	Action
8	At the “Print” prompt, the default printer will appear. Press enter to accept.
9	At the “Sort” prompt, press enter to default accession number.
10	At the “Printer” prompt, type the number of the printer to which the report should print and press enter.
11	The “TRANSPORT LIST NUMBER-Batch #-IN TRANSIT” list will print. Ensure every specimen on the list is accounted for.
12	Send specimens with “TRANSPORT LIST NUMBER-Batch #-IN TRANSIT” list to the testing laboratory via courier.
13	File the interim documents in their appropriate locations and store for 30 days.

Receiving a Batch

Step	Action
1	When a batch is received at the testing site, A. Compare the specimens received to the specimens listed on the transit list to ensure all specimens are accounted for. B. Delete missing accession numbers from the batch following the instructions above.
2	Access Sunquest SmarTerm function “TR” for tracking.
3	At the “?” prompt, type “3” and press enter to receive batch/specimen.
4	At the “Batch number” prompt, type the batch number from the “Queued for transit” list and press enter.  If the transit list was not sent with the specimens: A. Access one of the specimens by accession number using Laboratory Inquiry. B. At the “Style List” prompt, select “Order List” from the dropdown menu. C. Highlight the specimen for which you are obtaining information. D. At the “Audit Trail” prompt, click “Select.” E. The “Batch ID” will display on the right side of the screen. 

Step	Action
5	At the “Current track location” prompt, type in the template code for the receiving laboratory as listed above and press enter.
6	At the “Batch comment” prompt, press enter.
7	At the “Entire batch continues/disbands” prompt, press enter to accept the default.
8	At the “Print” prompt, type “N” and press enter for no printing.
9	At the “Sort” prompt, press enter.
10	At the “Accept, Modify, Reject” prompt, type “A” for accept and press enter.
11	At the “Use host” prompt, press the enter key to default the batch entry.
12	Deliver specimens to the appropriate testing department for completion.
13	File the “TRANSPORT LIST NUMBER-Batch #-IN TRANSIT” list in the designated location and discard after 30 days.

Track Status Codes

The following track status types will print on the various track lists and pending logs in the departments.

Code	Status
U	Unreceived specimen
R	Received—Not on batch
Q	Queued for transit
TR	In transit
F	Final destination received
+	More than one status; review in Laboratory Inquiry

6. RELATED DOCUMENTS

- SOP: Aliquotting Specimens
- SOP: Courier Schedule and Communication
- Form: Runners Delivery Service Log (AG.F372)
- Form: Runners Delivery Service Log for GEC (AG.F373)

7. REFERENCES

N/A

8. REVISION HISTORY

Version	Date	Reason for Revision	Revised By	Approved By
		Supersedes SGAH.LIS23.5		

9. ADDENDA AND APPENDICES

None