TRAINING UPDATE

Lab Location: Department: SGMC, WAH & GEC QA & Core supervisors
 Date Distributed:
 2/19/2019

 Due Date:
 2/26/2019

 Implementation:
 2/26/2019

DESCRIPTION OF REVISION

Name of procedure:

Proficiency Test Order Entry SGMC.QA4000 v1

Description of change(s):

This is a new SOP written to describe the process for ordering PT survey testing in SQ using GUI.

The naming format of the sample must be exactly as stated in the SOP to allow quantitative results to transmit electronically to CAP.

This SOP will be implemented on February 26, 2019

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

Non-Technical SOP		
Title	Proficiency Test Order Entry	
Prepared by	Cynthia Bowman-Gholston	Date: 2/11/2019
Owner	Cynthia Bowman-Gholston	Date: 2/11/2019

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 details the process for ordering LIS testing on proficiency survey samples in the Sunquest GUI system.

2. SCOPE

This procedure applies to QA and designees, or any staff members ordering CAP Survey materials for testing.

3. **RESPONSIBILITY**

QA staff or designees are responsible for performing this procedure. The Senior QA Specialist is responsible for the content and review of this procedure.

4. **DEFINITIONS**

- <cr>: carriage return, or press enter on the keyboard
- CAP: College of American Pathologists, the proficiency survey provider
- MRN: Medical Record Number
- LIS: The Laboratory Information System (Sunquest)
- GUI: Graphic User Interface

Patient Name: CAP sample number, Kit number

5. **PROCEDURE**

Placing the Orders

- **A.** Survey samples ship each Monday, from the survey provider. Each survey is tracked by a specific Kit number, which will be used as the first name of the specimen. Ordering the testing utilizes three functions:
 - 1. Administrative Data Entry sets up the specific CAP sample MRN and specimen name.
 - 2. Order Entry Used to order the specific LIS test codes to be performed on the samples
 - 3. Order Entry Used to print the labels for the testing.

Note: The following surveys are excluded from the ordering process,

Eluate (ELU) Red Blood Cell Antigen Testing (RBCAT)

- **B.** Log onto the CAP web site (www.CAP.org) e-LAB Solutions Suite/Result Form Data Entry
 - 1. From the list of active surveys that appear on the screen, depress the black arrow left of the Due Date column and select the survey that ships on the Monday that corresponds to this ordering day.
 - 2. From the expanded field that opens, look to the right side of the screen and select the link to **PRINT A BLANK RESULT FORM**
 - 3. The next page displays a list of printer options.
 - 4. Print the form.
- C. You will also need to **open** the ordering codes Excel spreadsheet, which identifies the test codes that correspond with the survey you are ordering. These spreadsheets will be found on the share drive at G:\AHC_Lab\Quality Assurance\Proficiency Testing\CAP [current year]\CAP LIS Orders WAH (SGAH) [current year].xlsx
 - **Note:** Surveys may have more tests listed on the result forms than we perform in our labs. Therefore this spreadsheet ensures that we consistently order only the test codes applicable to our laboratory.
- **D.** Log into the Sunquest GUI Application and specify the ordering location on the Log-In screen. (Testing for all sites can be ordered in the LIS from a single physical site by specifying the appropriate ordering location.) Select the **OK** button.
- **E.** Choose the appropriate site for your station or location. This will cause labels to print on appropriate printer.

SGMC	,	WAH		GEC
Phlebotomy	SP1, SP2, SP3	Phlebotomy	WP1, WP2	GL1, GL2
Customer Support	SCS, SOL	Customer Support	WCS, WFD	
Specimen Processing	SS1, SS2, SS3	Specimen Processing	WS1,WS2	
Blood Bank	SBB	Blood Bank	WBB	

Refer to the LIS procedure DLL - Device Lab Location for other location codes

		= ×	_
sunquest			
Sunquest L	aboratory™		-
			1
	CBOWMAN		

Lab Location:	WBB	BLOOD BANK	
Default Host			
	ок с	Cancel Help	
Copyright @ 2002-201	1 Sunquest Information Sy	stems, Inc. All Rights Reserved.	
CPT © copyright 2011 Fee schedules, relative by the AMA, are not pa directly or indirectly pn for date contained or n Association. Application	American Medical Associati value units, conversion fai rt of CPT, and the ANA is r ctice medicine or dispense ot contained herein. CPT is FARS/DFARS Restrictions	on. All rights reserved. Cors and/or related components are not a not recommending their use. The AMA de e medical services. The AMA assumes no a registered trademark of the American M Apply to Government Use.	asigned bes not liability ledical

F. From the ALL tab, Select the Order Entry function: Note: Surveys are tested by shift; A=Day shift, B= Evening shift, and C=Night shift

Order options Batch Orders Mode MODE1 Lookup by Patient ID Value Search By Default HID Only Search HID WAH	🖇 Order Entry	
	Order options Batch Orders Mode MODE1	Batch Definition

- 1. Use the drop down arrow in the **Order options** box to select **Batch Orders**.
- 2. In the box **Batch Definitions**, make **sure** that the HI<u>D</u> = the Hospital for which you are ordering
- 3. Select the active **Define** button

Order Entry						
Defining Batcl	h Entry Values	Ru	e Messages			
		2	rder Codes	mileitule continue		
(Patient Select)		or	Order Code	Order Description	Hodifier	DX Code
General information			COPCR	C Diffiale PCR		<u>w</u>
Collect date	08/14/2018					
Collect time	17:00					
Receive date	A.1111					
Order physician Philebotomist code	40658 ~ CACCIAB					

- 4. Document the collect date = order date
- 5. Collect time = order time (depress tab key which will move cursor to the receive date field, tab key to the receipt time). **Note**: all orders will be ordered as 'received' regardless of the testing shift.
- 6. Document the Ordering physician and input 40658 TAB
- 7. Depress **Patient Select**, which returns you to the primary Order Entry screen.

Order Entry									
Order options	Batch Orders	~	Mode MODE	1		Bat	ch Definition		
Lookup by	Patient ID	~	Value CAP-7	439 😡	Search		e <u>f</u> ine Cle	HID WA	IH 🔽
			<u> </u>	Default HID Only					
Patients	tanding orders								
Search found 1	patient matching	"Patient I	D=CAP-7439'						
Name	Patient ID	HID	SSN	Date of Birth	Sex	Status	INS ID#	AKA Name	User Defined Field
	CAO 7420	14/ 611		01/01/1079	M	ACT			

- 8. Lookup by: Use the drop down arrow and select Patient ID
- 9. Record (CAP-) as the MRN in the <u>Value</u> field and then click **Search**; the Demographics screen opens.

order options	Orders	~	Mode	MODE1	~				
ookup by	Patient Name	~	Value		6		Search		
	Accession Number		-	By Defau	It HID Only	-			
Patients	HIS Order Number Patient Exact Name								
ER AL PLA	Patient ID								
o fill the list,	Patient Name		the Sea	arch button.					
Name	Requisition Number Soundex		SS	in	Date of Birth	<u>i</u>	Sex	Status	INS ID#
	SSN	_							

- 10. On Demographics screen, click on **Create**.
- 11. Tab through the fields and enter the patient details (Name, age, sex) and save.Note: The patient name format is (LName) = CAP sample #, (FName) = kit #, i.e. BCS-01,30786355] and then click TAB twice.
- 12. Choose **SAVE** at the bottom of the page.
- 13. The primary Order Entry screen appears, containing all of the order entry data previously submitted in the batch definition.

Order Entry					_
CAP-7439 BCS-01,30786335 Date of birth 01/01/1978 (40Y) Sex M Hospital ID WAH Att Phys 1 40658 CACCIABEVE MD, NI	Rule Messages	Schedule Ordere			
Att Phys 2		lan an 100 12 an ann			
	Order entry	C Difficile PCR			
Patient Select View Blood Bank Data (1)	Order Code	Order Description	Modifier		DX Code
Concerned information	COPCR	C Difficile PCR			
Collect date 08/14/2018					
Collect time 17:00					
Receive date					
Receive time					
Const to physician 40658 ~ CACCIAB					
Copy to phys 2					
Copy to phys 3					
Order comment					
Order account # 99999999					
Phlebotomist code					
Workload code					
Conter location CAP CAP Surveys					
Community Med Rec					
	Accession assignm	ent .			
	The second second second	and the second second		A	a forders Contra
	Dept Sp	ecimen Comment		Acc # HIS Orde	e Order Code
	Gencad			0007010	COPER
				Baview	Anni CAssion HILL (Baassion Acc(2))
			Save Clear Rep		Results Exit

- 14. The screen displays the patient ID. Now enter the test order code(s) and click TAB. Verify the accuracy, and select the button to Assign Acc. Document the Accession number and MRN on the Excel ordering codes spreadsheet.
- 15. Depress the **Save** button to save the Accession number. Repeat the steps, starting at Step 8 until all samples have assigned accession numbers. Labels will print with each received accession number.

AD-7430 RCS-01 30786335	Rule Merraner						100
AF-7459 0C3-01,50700555	while messed are						
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Phys 1 40658 CACCIABEVE MD, NI	Deder Codes	the second se					
Phys 2	Pares cones	and the second se					
	Order gritry	C Difficile PCR					
atient Select) (View Blood Bank Data (1))	Order Code	Order Description	Modifier			DX Code	
meral information	CDPCR	C Difficile PCR					
flect date 06/14/2018							
llect time 17:00							
ceive date							
peive time							
der physician 40658 ~ CACCLAB							
py to phys 1							
py to phys 2							
py to phys 3							
ler comment							
ter account # 99999999							
ebotomist code							
ridoad code							
Cap ~ Cap Surveys							
minuta Med Hec							
	Accession assignm	uent [
	Accession assignm	sent					
	Accession assignm	ecimen Comment		Acc #	HIS Order #	Order Code	
	Accession assignm	sent ecimen Comment		Acc # 127010	HIS Order # C36978-0	Order Code CDPCR	
	Accession assignm Dept Sp GenLab	eent		Acc # T27010	HIS Order # C36978-0	Order Code CDPCR	
	Accession assignm	ectimen Comment		Acc # 127010	HIS Order # C36978-0	Order Code CDPCR	
	<u>≜</u> ccession assignm Dept Sp GenLab	eerit		Acc # 127010	HIS Order # C36978-0	Order Code CDPCR	
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	Accession assignm Dept Sp GenLab	eerk eecimen Comment		Acc # 127010	HIS Order # C36978-0	Order Code CDPCR	
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	Accession assignm Dept Sp Centab	eerimen Comment		Acc # 127010	HIS Order # C36978-0	Drder Code CDPCR	
	Accession assignm Dept Sg Gentab	ecimen Comment		Acc # T27010	HIS Order # C36978-0	Order Code CDPCR	
	Accession assignm Dept Sp Gencab	eert		Acc # 127010	HIS Order # C36978-0	Order Code CDFCR	
	<u></u> Δccession assignm Dept Sp GenLab	eectimen Comment		Acc # T27010	HIS Order #	Order Code CDPCR	
	Accession assignm	eccimen Comment		Acc # 127010	HIS Order # C36978-0	Order Code CDPCR	
	Accession assignm Dept Sp Gencab	eeclimen Comment		Acc # T27010	HIS Order # C36978-0	Order Code CDPCR	
	Accession assignm	eccimen Comment		Acc # 127010	HIS Order ≆ C36978-0	Order Code CDPCR	
	Accession assignm	ectimen Comment		Acc # 127010	HIS Order # C36978-0	Order Code (CDPCR	
	Accession assignm	eert		Acc # 127010	HIS Order # C36978-0	Order Code CDPCR	
	Accession assignm	eectmen Comment		Acc # T27030	HIS Order ≢ C36978-0	Order Code CDPCR	
	Accession assignm	vert		Acc # 127010	HIS Order a C36978-0	Order Code CDPCR	

16. Some orders may require a specimen source code, the system will prompt:

		Result Entry Dutical	(10.45	#1 CBC-05	2245628	Marco	
ten Blod Bark Data (3)	DE Cada	Paucia	CAP-90	er (199-195),	12343478	nusp	
RANC UNE Citye		Dept	Acc#	Order Code	Test Code	Results	
8.3.2014		MC	M49015	XURING	SOES		
15.00				XURING	SREQ	HDE	
KINTE - CACCHER_							
		7-12-02-02	Concision of	Parameters		Res A	
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		Composed	rearing			Contrast Dros wereau	-
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And Andrea Connect Area	States and the second						
×	5 FT78378-0 XURINC						
							_
						- Swe	100
(Arreg)	Anapirets (Assessed Acc(2))						

Example: SDES: GASD (gastric drain), or SYN, or UR etc. <cr>. To search for a source code, enter the first few letters of source into the field and select the magnifying glass (search) to display list of possible codes.

17. If you need to re-print lab labels:

- a) Return to the Excel spreadsheet to obtain the accession number(s)
- b) Return to the Order Entry Tab.
- c) Look up the patient by the Accession Number
- d) Click the button for Reprint Labels. A box will open on the screen showing the existing orders.
- e) Depress the button to the right Select All
- f) Print

- 18. Place all labels and a Survey Companion Document into a page protector.
- 19. Label the tab of the page protector with the year, Survey Name, and testing department
- 20. Leave this page protector in the Group Lead mail slot for the shift assigned to perform the testing.
- 21. Send a mailbox to all staff to inform them of the order status for the current week's survey shipments

When the Survey Arrives

- A. Examine the CAP Survey materials and specify the shift.
- **B.** Document the findings on the Survey Companion Document, and place the samples and paperwork into a biohazard bag and place in the proper holding temperature prior to testing.

C. Testing and Resulting

- 1. All samples will appear on the pending logs, and staff will follow the same process used for resolution of untested patient samples (locate the samples and perform the appropriate testing).
- 2. All testing that staff result through the DI system, will transmit electronically to the CAP.
- 3. For specific details of this process, refer to the procedure Proficiency Test Handling and Result Submission.

6. **RELATED DOCUMENTS**

Proficiency Test Handling and Result Submission, QA procedure Survey Companion Document (AG.F48) Mailbox Message (Function: MB), Lab policy

7. **REFERENCES**

None

8. **REVISION HISTORY**

Version	Date	Reason for Revision	Revised By	Approved By
		Supersedes SOP SGAH/WAH/GEC.QA28.2		

9. ADDENDA AND APPENDICES

None