

TRAINING UPDATE

Lab Location:

SGMC, WAH & GEC

Date Distributed:

2/19/2019

Department:

QA & Core supervisors

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
<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

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

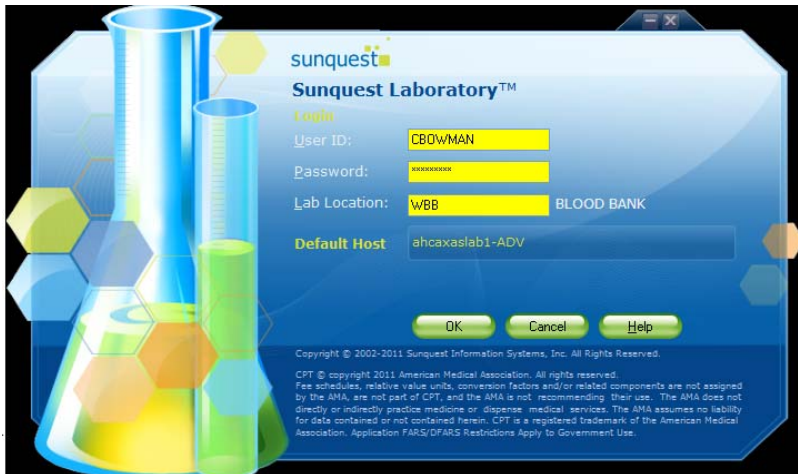
Note: Surveys may have more tests listed on the result forms than we perform in our labs. Therefore this spreadsheet ensures that we consistently order only the test codes applicable to our laboratory.

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

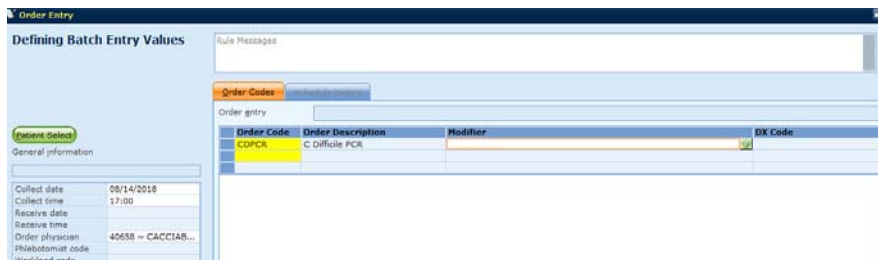


F. From the ALL tab, Select the Order Entry function:

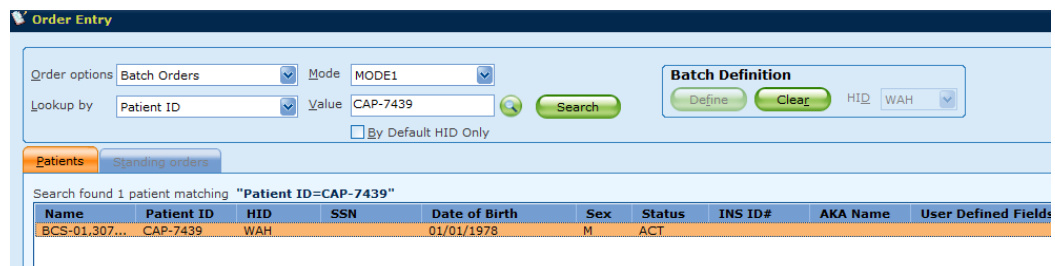
Note: Surveys are tested by shift; A=Day shift, B= Evening shift, and C=Night shift



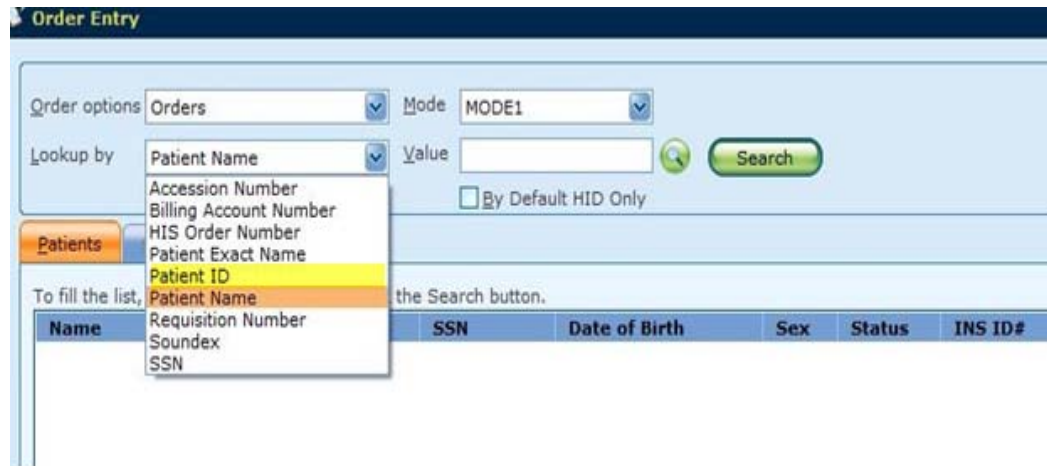
1. Use the drop down arrow in the **Order options** box to select **Batch Orders**.
2. In the box **Batch Definitions**, make **sure** that the **HID** = the Hospital for which you are ordering
3. Select the active **Define** button



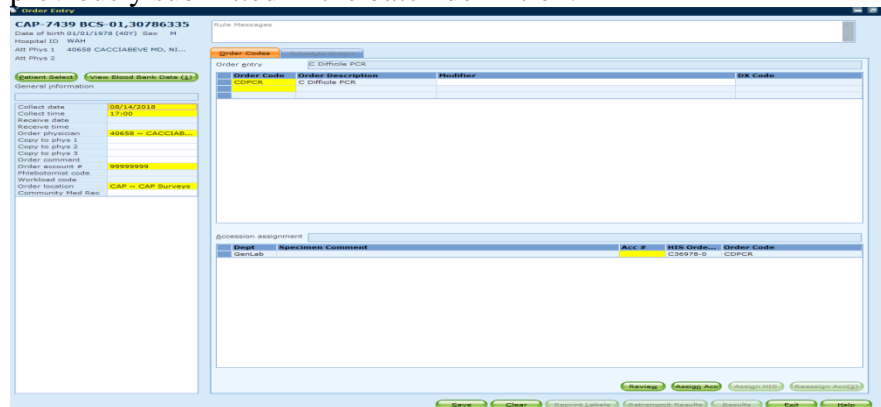
4. Document the collect date = order date
5. Collect time = order time (depress tab key which will move cursor to the receive date field, tab key to the receipt time). **Note:** all orders will be ordered as 'received' regardless of the testing shift.
6. Document the Ordering physician and input **40658**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



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



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.



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.

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, N...
 Att Phys 2

Order entry: Difficile PCR

Order Code	Order Description	Modifier	DX Code
CDPCR	C. Difficile PCR		

Accession assignment

Dept	Specimen Comment	Acc. #	HIS Order #	Order Code
GenLab		727010	C39978-0	CDPCR

Buttons: Review, Assign Acc, Assign HIS, Reassign Acc, Save, Clear, Reprint Labels, Reprint Results, Results, Edit, Help

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

Order Entry
 CAP-9581 CBG-05,12345678
 Date of birth 05/10/1984 (30Y) Sex F
 Hospital ID SGMH
 Att Phys 1 40658 CACCIABEVE MD, N...
 Att Phys 2

Order entry: Culture

Dept	Specimen Comment	Acc. #	HIS Order #	Order Code
MC		717078-0	XURNC	

Order Entry
 Patient: CAP-9581 CBG-05,12345678 Hospital: SGMH

Dept	Acc#	Order Code	Test Code	Results	QA Page
MC	717078-0	XURNC	SDES		
		XURNC	SABQ	NDX	

Test: SDES - Specimen Description: _____ Result: _____

Text type:

Buttons: Save, Cancel, Help

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:

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