Quest Diagnostics

TRAINING UPDATE

Lab Location:	SGAH & WAH	**Date Distributed:**	10/1/2012
Department:	Specimen Processing	**Due Date:**	10/31/2012

DESCRIPTION OF PROCEDURE REVISION

Name of procedure:
FES, Processing Microbiology Orders SGAH.S25, WAH.S23 v001
Description of change(s):
Section 4: Add Maximum batch size, revise courier list retention time, add SOP to FES access code Section 5: Clarification of placing FES Batch end label on ROB Batch list and verifying specimens processed, changes to Print courier packing list Section 6: Update document titles Changes are shown in yellow highlight in attached SOP.

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

Approved draft for training all sites (version 001)

Non-Technical SOP

Title	**FES, Processing Microbiology Orders**	
Prepared by	Leslie Barrett	Date: 10/2/2009
Owner	Samson Khandagale	Date: 10/2/2009

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:	

12 month (or new) management review and approval: Signature acknowledges SOP version remains in effect with NO revisions.		
Print Name	**Signature**	**Date**

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1. PURPOSE

To describe the steps to electronically submitted Microbiology orders to Quest/Chantilly and print the required labels.

2. SCOPE

This procedure applies to Microbiology orders and specimens submitted to Quest/Chantilly for testing.

3. RESPONSIBILITY

It is the responsibility of Specimen Processing staff, or Group Lead and staff technologists to utilize FES appropriately for Microbiology specimens to Quest/Chantilly.

4. DEFINITIONS

FES: Front End System refers to the software system used to process order/receipt information into the Quest Diagnostics Nichols Institute-Chantilly Laboratory Information System (LIS) from a remote site (SGAH/WAH).

OSA: Off site accessioning

Tandem: Name of Quest Diagnostics Nichols Institute, Chantilly, VA. LIS

Sunquest: Laboratory Information System (LIS) at SGAH and WAH.

FES Access code	A user must be assigned a TECH ID and PASSWORD for FES remote order entry. Refer to procedure 'FES Password' for process to request ID and password, and how to re-set a password when it expires.

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Specimen	Specimen is defined as the type of specimen as such as BL (Blood Culture), CS (CSF), SW (Swab), MI (Miscellaneous for any specimen, which is not found in the drop menu), TIS (Tissue) UA (Urine), UC (Urine Cup).
Condition	Condition is used to define the source of the culture, such as SP (Sputum) when MI is used for specimen. Please refer to attachment at the end of this procedure. For most orders, you will leave condition blank.
Master Label	The first time you log in to accession the specimens, you will have a Master Label with a number, zero out the number. You will have to do this only for the first accession number.
"P" label	If you have a P label, you need to review your specimen from the previous Specimen screen to make sure you have entered the correct specimen.
"A" label	If you have an A label, you need to review your specimen from the previous Specimen screen to make sure you have entered the correct specimen.
Extra Label	Zero out the extra labels
Enclose in Bag	Zero out this label. **(Do NOT use this for ANA bags)**
Blood Culture	1. Enter BL as the specimen but you will only be sending plates. 2. Tandem will split Culture into 2 Tandem Accession Numbers for the Aero and Anaerobic cultures. 3. If you have more than 5 plates for any single accession, there is an error. Stop and correct the problem.
One specimen, multiple orders	You must have a specimen for every order. If QNS to split, call nurse or physician cancel test.
Biohazard Bag	One patient specimen or plates from one specimen/accession per Biohazard Bag. Do NOT put plates from multiple patients or multiple accessions in a single Biohazard Bag. If extra labels were printed, place in the outside pouch.
Plates	Check to be sure all plates are taped closed. If lids are not taped to plates, add tape before proceeding.
Batch Size	Maximum batch size is limited to 15 accessions.
ROB	ROB is the Reference Batch List created by the Lab's LIS (Sunquest). You can place the Batch Start and Batch End on this document.
Courier List	List to be included in every yellow bag being sent to Chantilly. Generate as many copies as you need by changing the # of copies when printing the courier list. Site keeps the courier list for 1 month.
Green screen	If you do not enter a specimen or plates at the Specimen Screen, you will get a Green Screen. The only way to exit is to CTL/ALT/DEL to log off FES.
Problems	If are having problems trying to accession in a specimen. See notes section in "Scanning in Misys accession number". If FES is not working, contact the Chantilly IT Help Desk. If you are experiencing problems with your Tech ID or Password

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	then call: Mon – Fri 0800 : 703 802 6900 Ext 7146 After hours: 1 877 537 8378 option 5 Make sure you let them know that you are having problems with FES.

5. PROCEDURE

Process Description

- The Front End System (FES) with Off Site Accessioning (OSA) extensions allows electronic orders to be processed and associated specimens labeled before the specimens are delivered to Chantilly. The LIS (Sunquest) function ROB must be performed prior to FES as this electronically transmits orders to the Quest Chantilly FES system.

The basic steps involved in the use of FES-OSA with a hospital system are:

- Test ordered in HIS and transmitted to hospital's LIS or ordered in LIS.
- Specimen(s) collected
- Specimen(s) arrive at hospital's lab, logged into hospital's LIS, and labeled.
- Hospital's pending orders for Chantilly are added to a batch for transmission to the Chantilly Lab.
- Electronic orders are processed by FES with the user logged in using a facility code other than 0. Facility Codes – WAH Microbiology is 23494, SGAH Microbiology is 23495.
- FES labels are applied to specimens and associated plates/broth.
- Prior to arrival of the courier, FES-OSA is used to create batches of specimens based on groupings of specimens. It is expected that there will be a batch for Micro (Yellow Bag) incubator, ambient specimens, and refrigerated specimens.
- The Chantilly courier signs courier log sheet and indicates the number and types of bags picked up. Processor verifies by also signing log.
- If the Hospital cannot access FES due a down at time, the specimens will remain stored in the hospital's incubator. If downtime is to exceed 8 hrs, than notify Lead Tech/Supervisor on site, Administrator On Call, LIS On Call and Chantilly Micro who will determine if specimens are to be sent without accessioning in FES.

STEP 1:	Check ROB list. Verify number of specimens in the FES box is the same as number of specimens/plates on ROB list.
STEP 2: **FES Order Entry Processing**	Click on Desktop icon "FES". Enter in the following info. Tech Name: This is your Tandem tech code. Password: Enter in password associated with your tech code Facility ID: Enter one of the following- Shady Grove Adventist facility ID is 42. Washington Adventist facility ID is 43.

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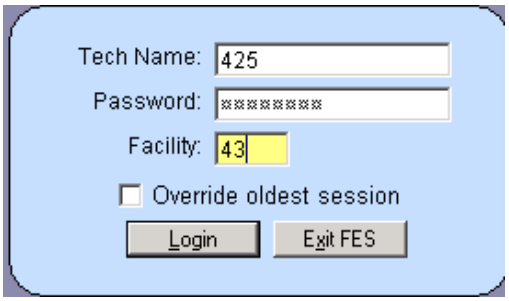
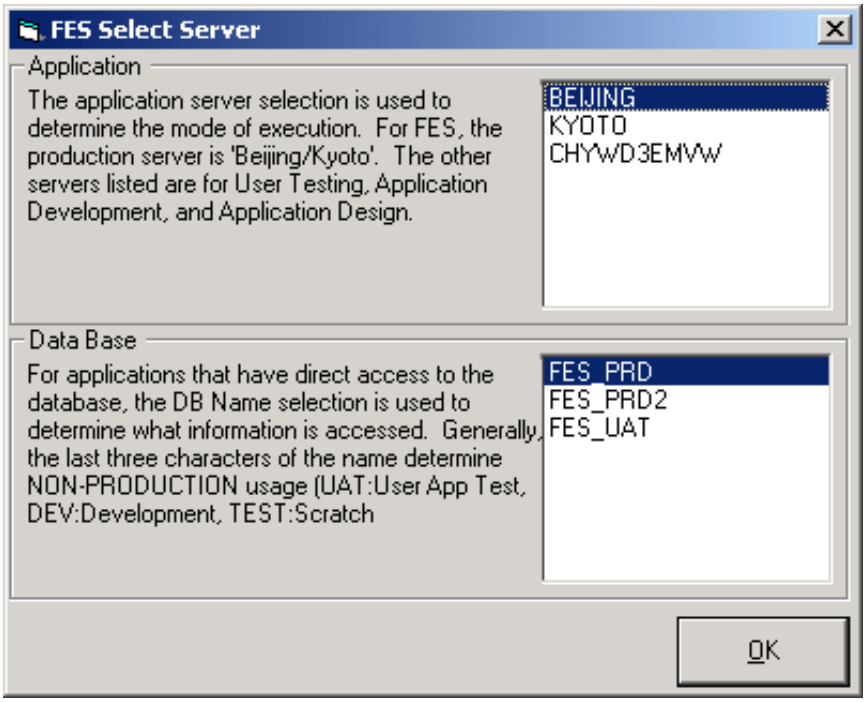
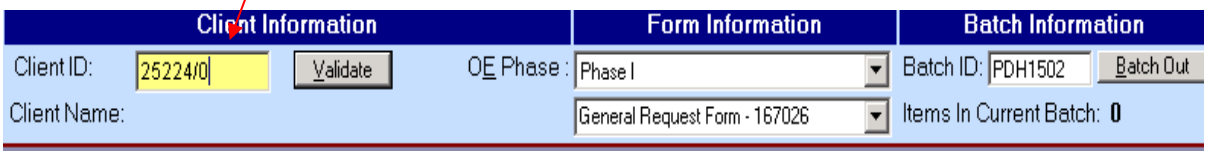


	Click on Login or press the ENTER key to enter the application.

FES Select Server	Click on OK. Do not change the defaults of BEIJING and FES_PRD.



Client Info Screen	Enter one of the following client numbers: **SGAH**: 23495/0 SGAH microbiology account number **WAH**: 23494/0 WAH microbiology account number



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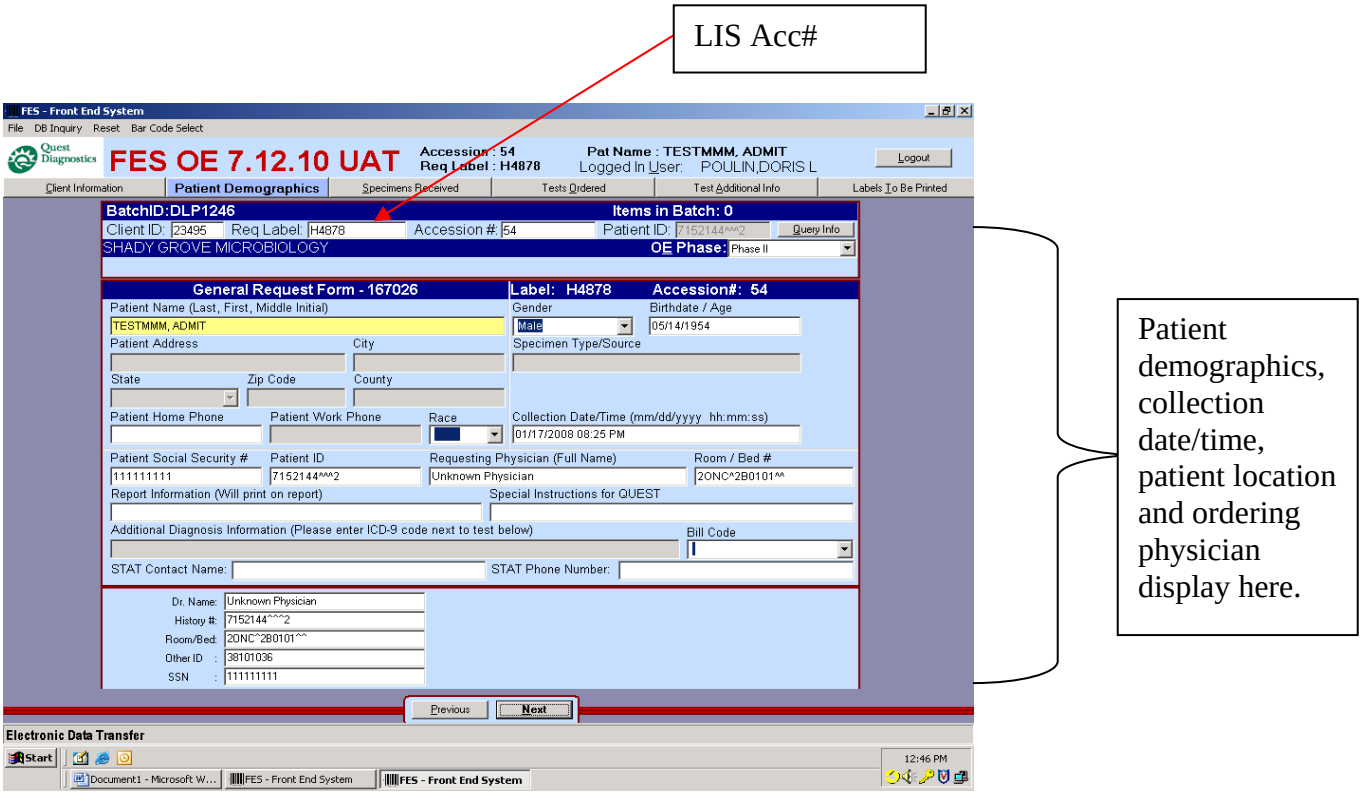
	After entering "23494/0 or 23495/0" for the client number, pressing the ENTER key will validate the client number and move the cursor to the OE Phase field. The "/0" will NOT be displayed after validation.
	Press ENTER key again, the Patient Demographic screen will be displayed. The barcode printer will print two "Batch Start" labels. The batch number consists of your tech code and the current time. Place one on the Sunquest ROB batch list and one on the FES courier list.
Scan in Misys accession number	Use the bar code scanner to scan in the LIS-generated label on the specimen. The LIS accession will populate the Req (requisition) Label field. The order demographic information display on the remainder of the form.



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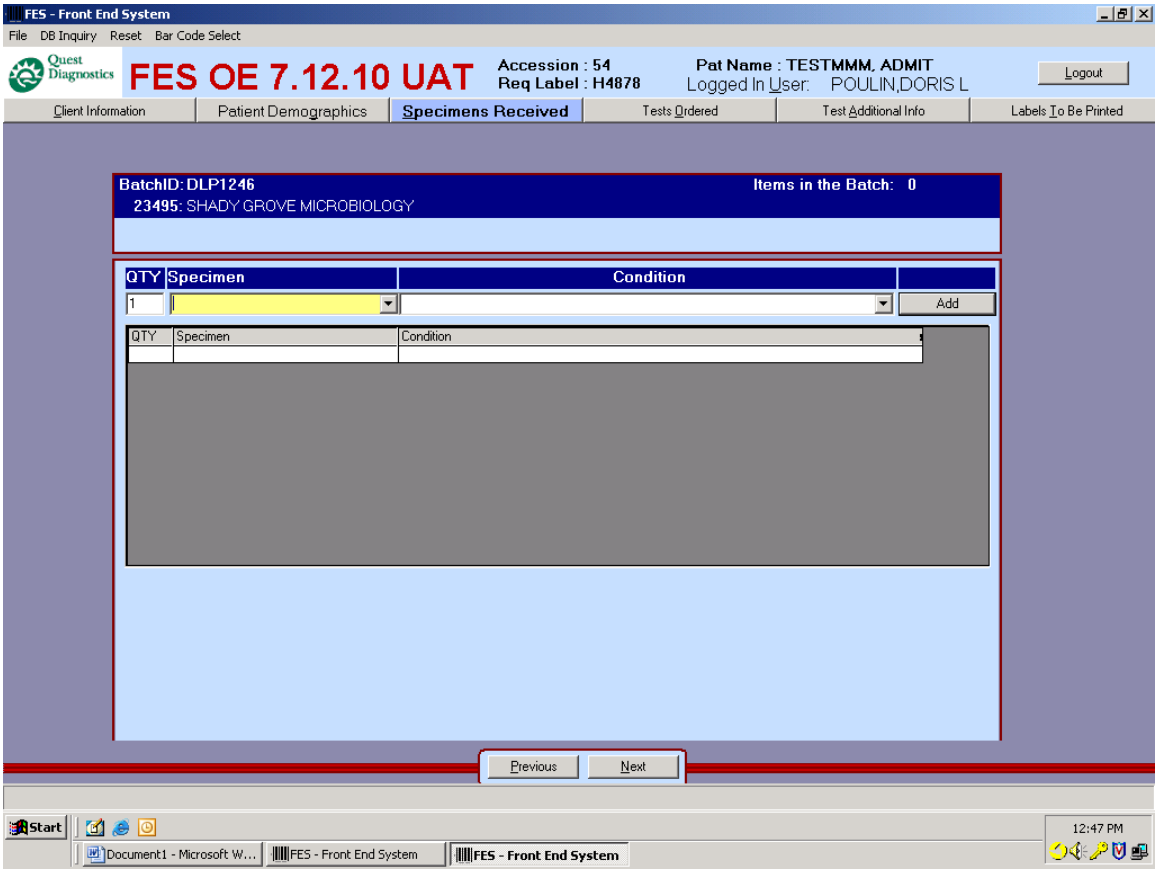
	Note: If you see the following message display on the bottom left hand corner of the screen "No Order On File", 1. Check to confirm that the ROB batch has been queued. 2. If not, queue the ROB batch 3. Try queuing the batch again 4. If still a problem contact LIS support. If a message containing the phrase "Object or With Block Not Set" is displayed, contact Chantilly Operations at 703-802-7600 ext. 7129.
	Double-check the Patient Name and the Patient ID to ensure they match the information on the specimen in hand. If they match then press ENTER.
	You will need the Sunquest ROB Batch List to determine the source.
	Refer to appendix for Specimen (drop down menu) and Condition (drop down menu or free text)

System will pause until you enter a Specimen from the drop down menu.



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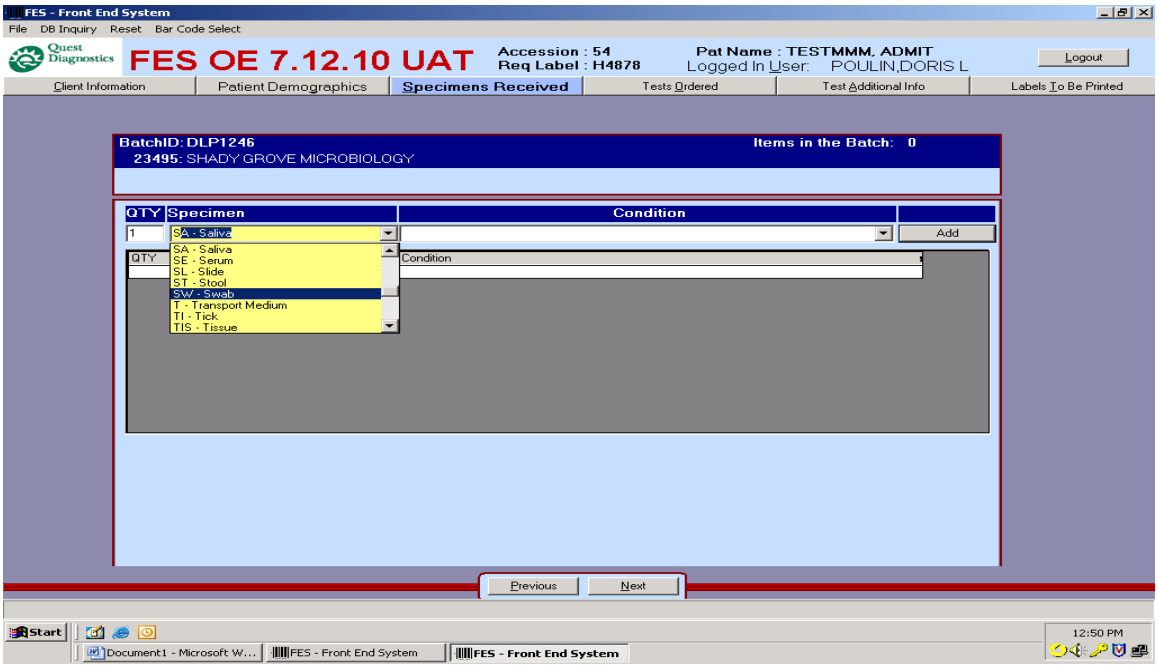
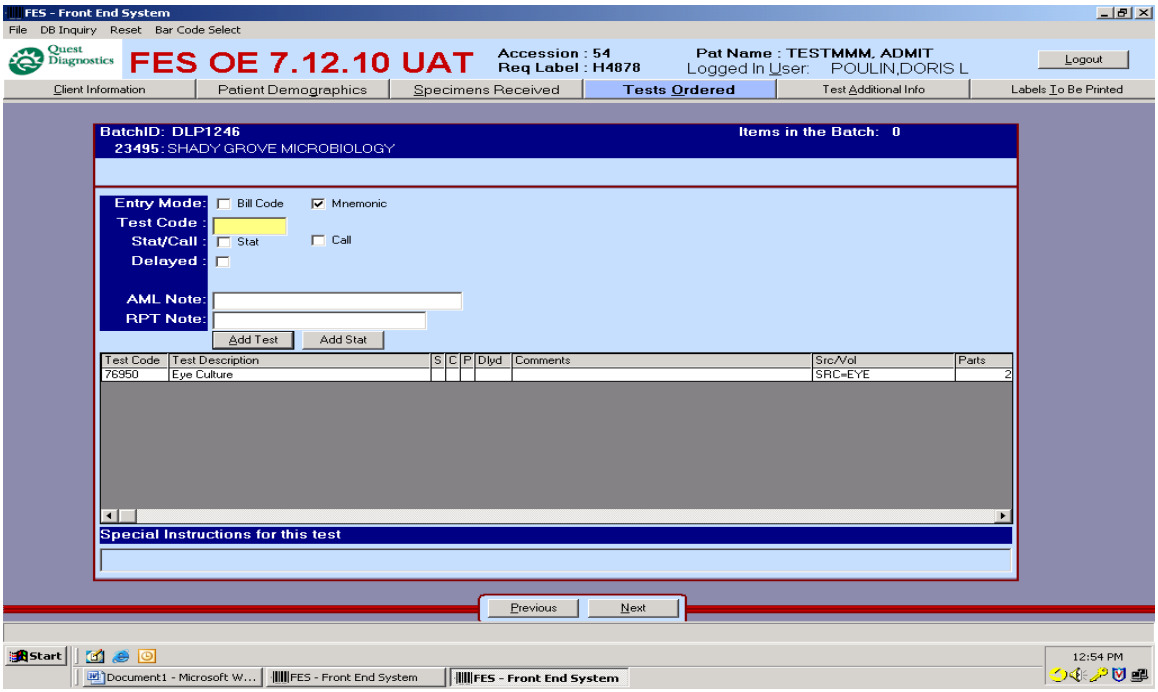
Enter from the drop down menu or type in a couple of letters for the specimen, such as SW for Swab, press Enter. You must have specimen in the Specimen Field; otherwise you will get a GREEN Screen.



The following screen will display the Quest Tandem Order Code, Test Description and source of the culture. Press Enter.



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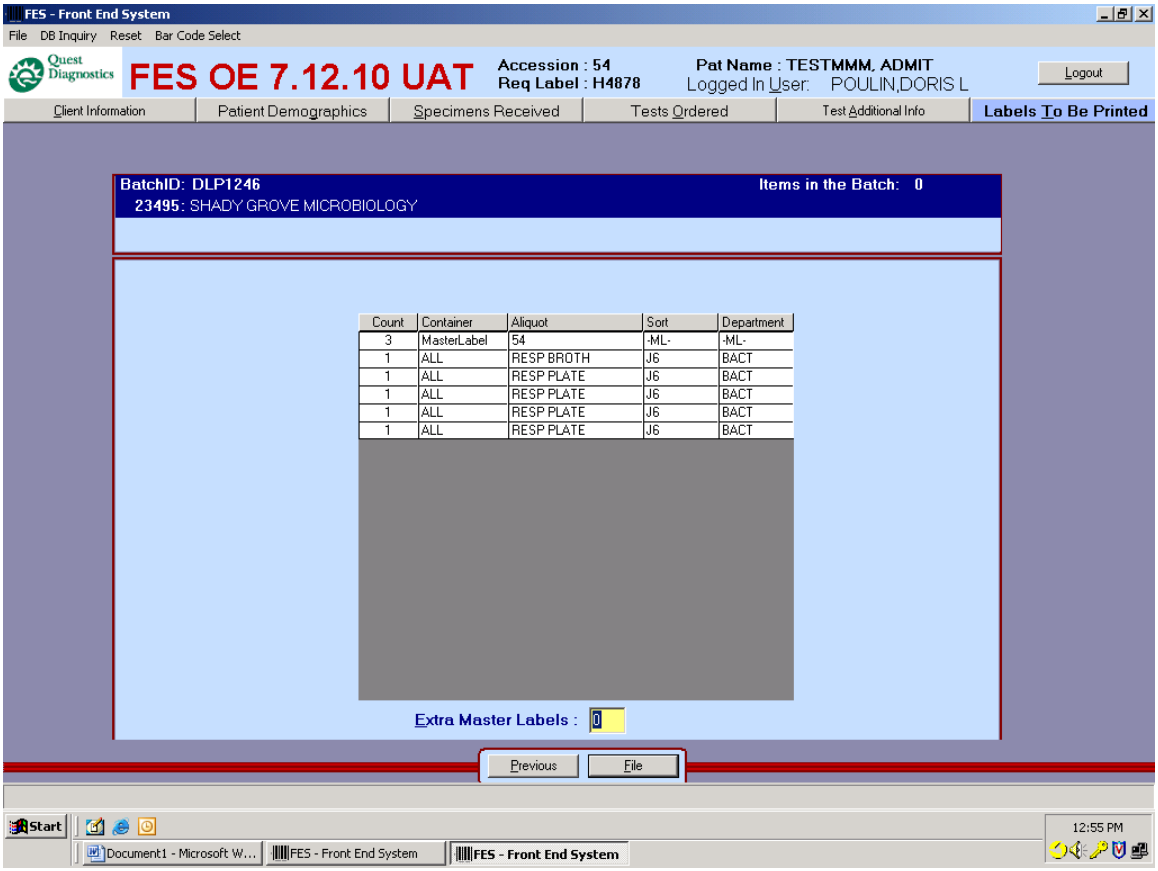
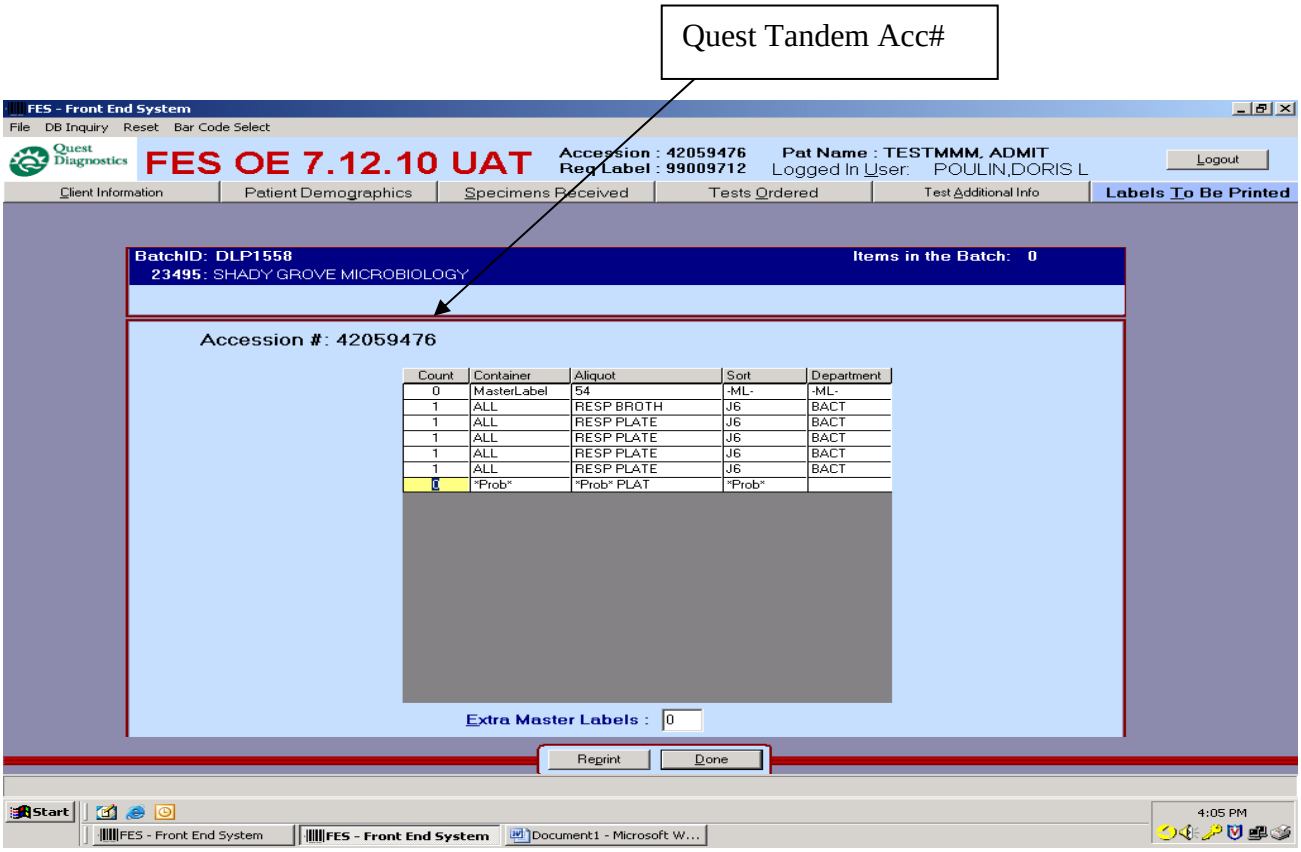
Screen will show the number of labels that will print when you Press Enter.



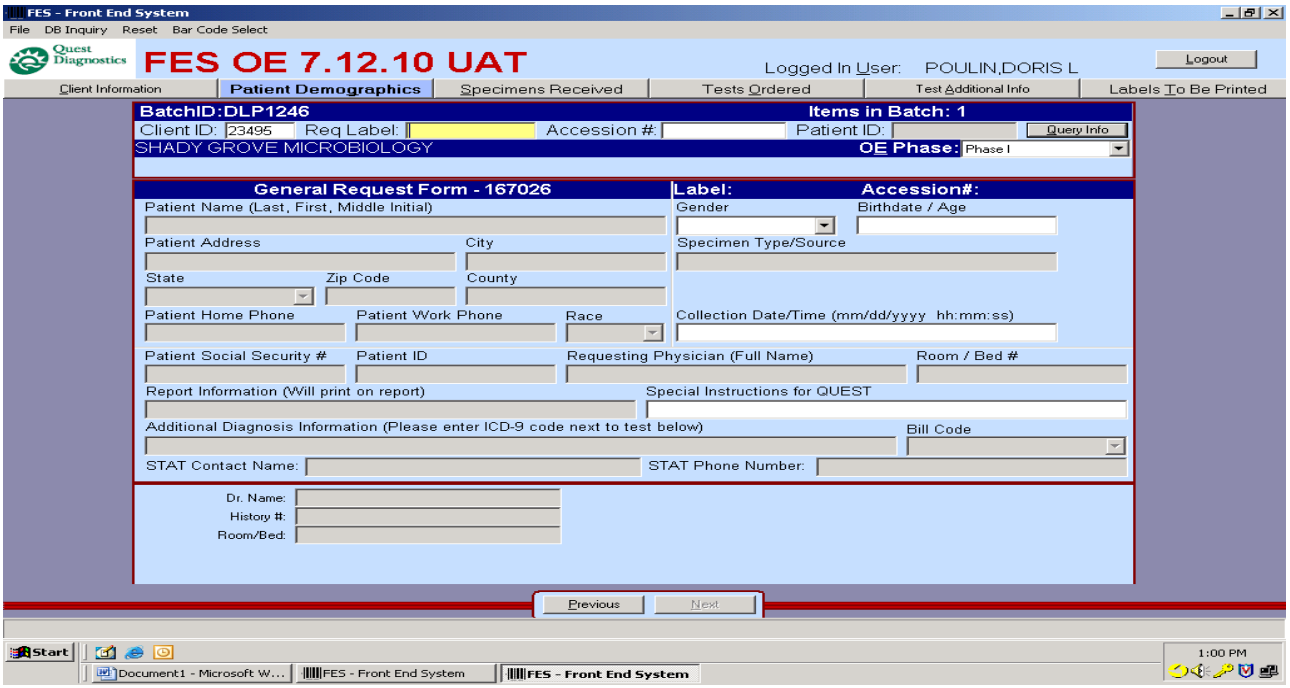
Master Label, change to 0

If you see A or P, go back to previous screen. You entered the incorrect source or condition for the order.

File Accession and Print Labels	Pressing ENTER, label screen will display. You can REPRINT or press ENTER for DONE.



The Accession Screen will display for the next LIS Accession to be scanned in.



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	Before proceeding to scan the next LIS Accession number, label your specimen and plates and return them to the biohazard bag. **Work with only one specimen at a time**. Do NOT take all the specimens and plates from their individual bags at the same time and line them across the table.
	1. Verify the patient name on both the Quest Tandem Labels and the LIS labels. 2. Place the first label on the specimen. The specimen label has the specimen source on it, i.e., SRC=EYE AND RESP BROTH. **Label is placed with tube top facing your right.** 3. Next place PLATE labels on the plates/broth. 4. Place that patient's specimen/plates in a Biohazard bag. If you accidentally printed extra labels, place in the outside of the pouch of Biohazard bag. 5. Continue to scan the next LIS Accession #. 6. Place the "BATCH END" label on the Sunquest ROB packing list which will give you a total number of specimens processed and the FES Courier List. 7. Verify the number of specimens processed is the same as the number of specimens on the ROB list. Note: The number of **specimens** processed on the ROB list may be different than the number of **accessions** on the ROB list since a blood culture with both XIDS and XIDSN will have the same LIS accession but 2 different Tandem accessions. 8. Each ROB batch should correspond to an FES batch. Do not combine several ROB batches to make one large FES batch. **The maximum number of specimens on a batch is 15.** At this point, the Previous / File buttons at the bottom of the screen will change to Reprint / Done. **Note**: In the event the printer jammed or not enough labels were produced, the labels can be printed again by selecting the Reprint option. Press the ENTER key or click on the Done button to return to the Patient Demographics screen.
STEP II: Creating Batch list	Next step is to add the FES accessions to a Batch list. From the File option select the – OSA Batch option. See below. OR use the FES Offsite icon

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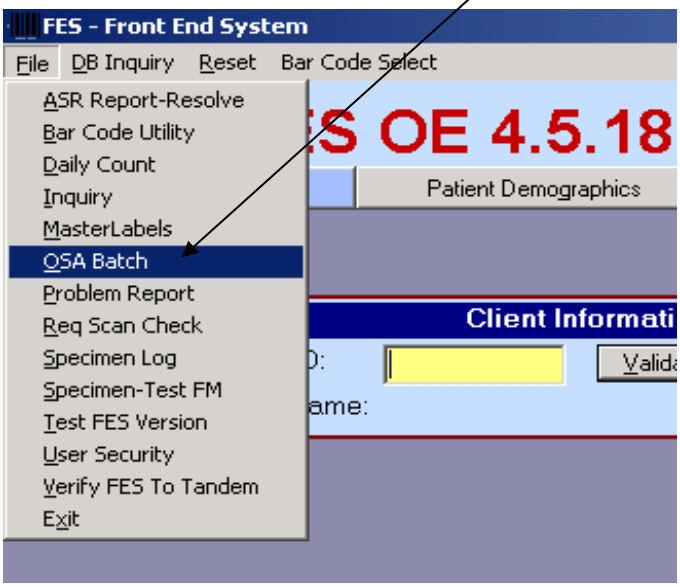
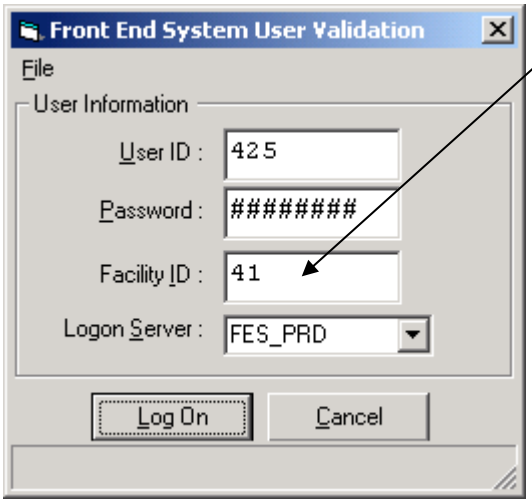


	The following login screen displays. Enter the facility ID. WAH: 43 SGAH: 42 Then click on LogOn.



	Once successfully logged into the system, the initial OSA screen will display.

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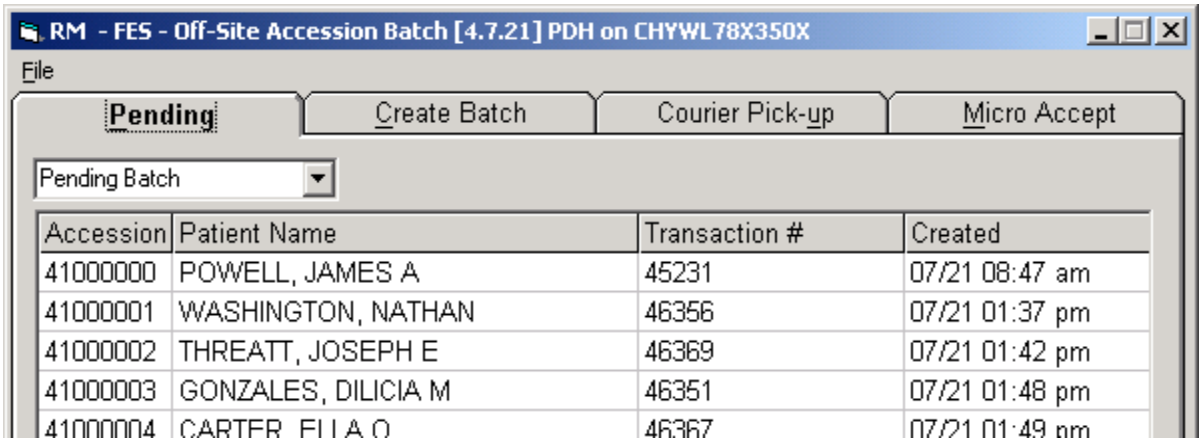
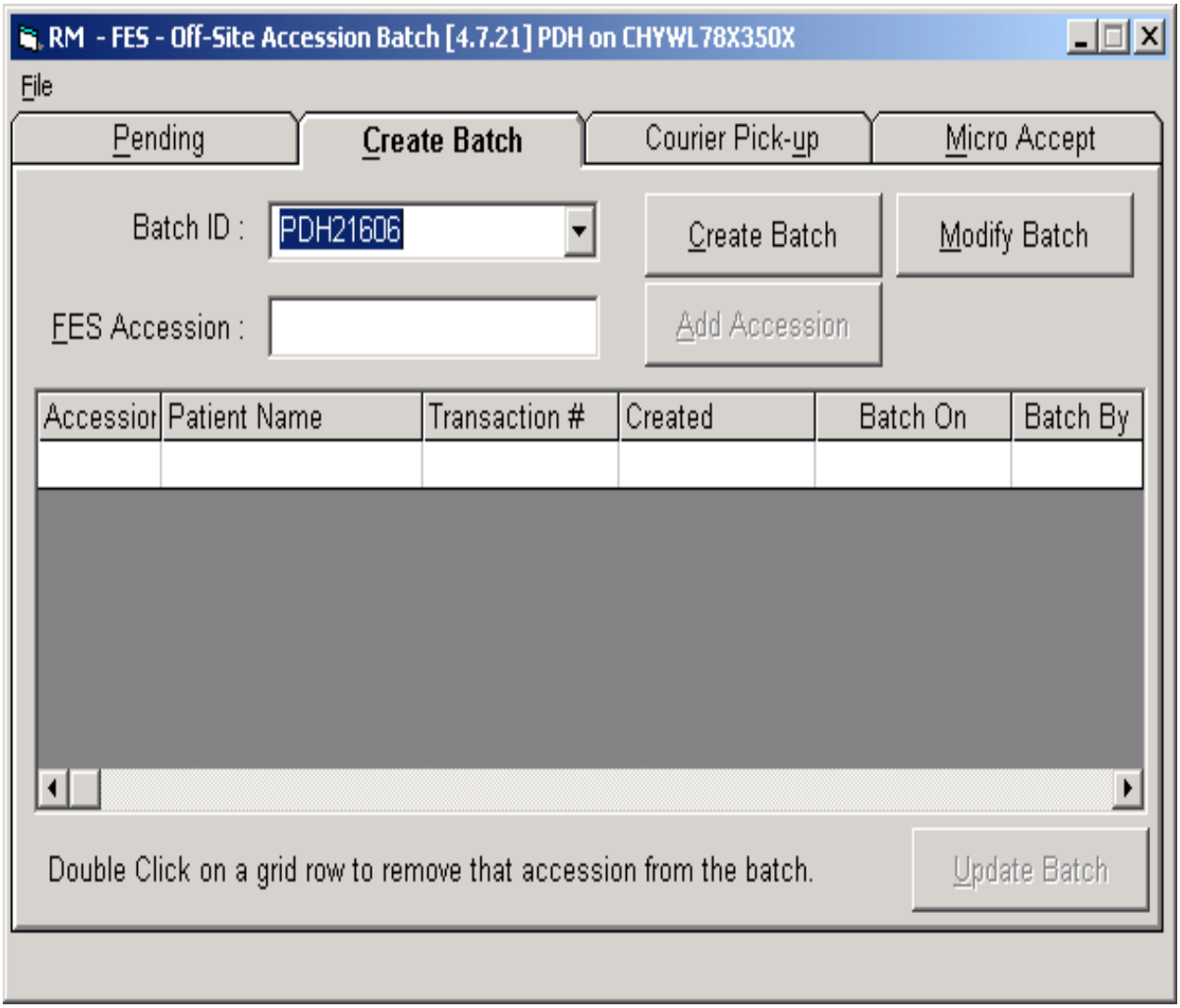


	Note: OSA will automatically set your CAPS LOCK and NUMBER LOCK status. Also, the OSA will automatically log the user off after a period of inactivity. Unlike FES/UI, OSA will warn the user starting approximately three (3) minutes before the program actually terminates.
	Pending Tab (Informational): This tab shows information about pending actions for OSA. There are three (3) actions that can be pending: Pending Batch: This is a list of accessions that have been entered in FES but have not yet been assigned to a [Courier] Pick-Up batch. ***You must always go back to the Pending Tab after you have created a batch. The Pending Tab should NOT have any orders pending once you have created a batch.*** **If you have patients in the Pending Tab which are greater than one day:** 1. **Check in Sunquest, if canceled, notify a lead tech or supervisor.** 2. **IF NOT CANCELED IN SUNQUEST, YOU MUST TROUBLESHOOT THE PROBLEM.** Pending Pick-Up: This is a list of batches created that have not yet been picked-up by the courier. This will generally have only one entry. If there are batches older than 24 hours, you need to contact Quest Chantilly Micro to resolve pending Pending Accept: This is a list of batches that have been picked-up by the courier but not yet accepted by the Chantilly Lab. This will have multiple entries only if multiple batches are created for courier pick-up. If there are batches older than 24 hours, you need to contact Quest Chantilly Micro to resolve pending.

Create Batch Tab	Select the "Create batch" Tab. (The Batch ID will default in. It is a combination of the current user's three-character initials followed by the last digit of the day-of-month and then the hour and minute component of the current time. For example, if the option was accessed at 12:34 on the 10th day of the month by Alice B. Cooper, the batch ID displayed would be "ABC01234.")



	Click on the Create Batch button
	* Batches should not contain more than 15 microbiology specimens each. If there are more than 15 specimens, smaller batches should be prepared more frequently. 1. Add accessions to the batch by scanning in the FES barcode accession number (Not the LIS Accession number). 2. Once scanned in, the "Add Accession" button becomes active and defaults.

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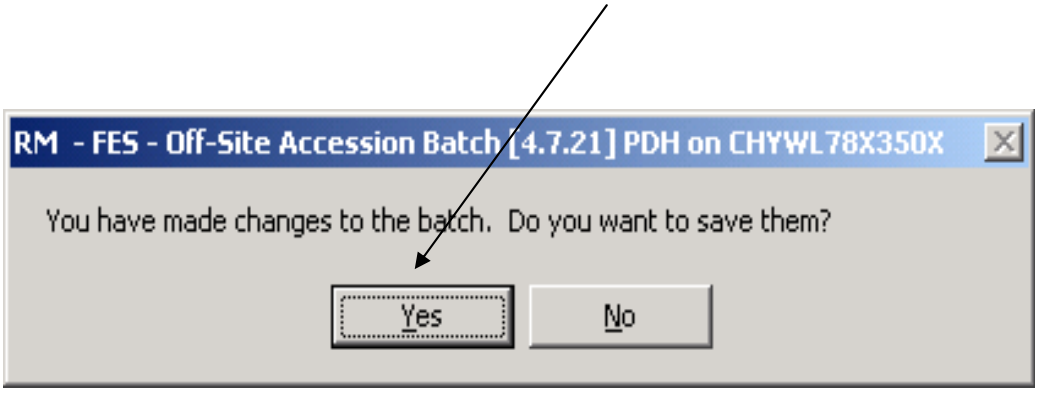
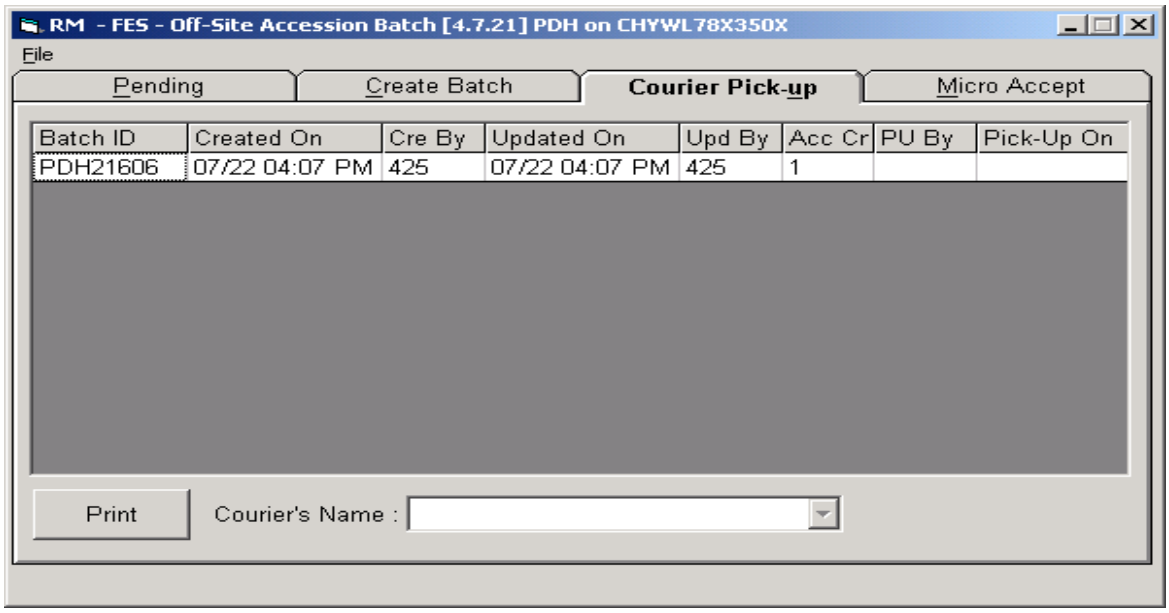
	3. Press ENTER. The accession number will now be placed on the batch list (grid row). ****You should have a one-to-one match for every item being sent to Chantilly**.** 4. Once you have completed adding Accessions to the Batch then click on the "Batch Update" button. You must go back to the PENDING Tab to see if there are any orders pending. If orders are present from your batch, modify the batch you created. The PENDING Tab must be empty until the next ROB is queued from the LIS (Sunquest).
	Note: If the accession is already on the packing list, a message box is displayed noting the position of the accession on the list. If the accession is not pending for the packing list (i.e. the accession is not on the list of pending accession from the first tab), an error message is displayed. An accession can be removed from a batch by double-clicking on the accession in the list of accessions on the batch. No changes are made to the batch until the Update Batch button is selected. If changes are made to the batch and the user attempts to leave the screen before saving them, a message box is displayed allowing the user to save the batch before losing the changes made.



Print Courier Packing List	1. Once a batch is created go to the "Courier Pick Up" tab and print sufficient number of copies of the batch report in order to place one in each Micro bag by clicking on the PRINT button. Verify that specimen/plates and orders match. 2. Log out of FES. When you log out the "BATCH END" label will print. Place this label on the Sunquest packing list and Courier List. 3. Highlight the number of specimens processed from the FES batch label 4. Verify that the numbers match the number of specimens on the ROB batch. Note: The number of **specimens** on the ROB list may be different from the number of **accession numbers** on the ROB list since an XIDS and XIDSN may have the same accession number. If there are AER and ANA blood cultures with the same accession number on the ROB list, verify they have separate FES numbers. You should never have more than 5 plates with the same FES number. 5. Place one copy of the FES/Courier packing list in each microbiology biohazard bag (bag with wide yellow stripe). 6. Staple the following documents together to file and maintain on site for one month: ROB batch list on top, followed by the ROB packing list, and then the FES packing list. 7. When the courier arrives you will need to mark the batch as picked up. Proceed to Step III.



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Example of batch list:

```
        Quest Diagnostics Nichols Institute-CHA
01/30/08 20:42:16          Accession Off-Site List                    Page:  1
User: DPOULIN / 42              Batch: JAS81UJ37                  CHYWDGG9C111

Created on 1/30/2008 7:41:20 PM by JAS
Last modified on 1/30/2008 7:41:20 PM by JAS
15 entries on batch.

Courier:TESTING                                Pick-Up Time: 01/ 30/ 2008    19:4

                                              Drop-Off Time:___/___/_____  ___:_

 1 Accession: 42059514 FES, TEST                                  OE Batch: JAS1911
Client#:23495  Order#:X1010  LabelText:UR-RD  SortCode:J6  RouteCode:BACT

 2 Accession: 42059514 FES, TEST                                  OE Batch: JAS1911
Client#:23495  Order#:X1010  LabelText:UR-RD  SortCode:J6  RouteCode:BACT

 3 Accession: 42059514 FES, TEST                                  OE Batch: JAS1911
Client#:23495  Order#:X1010  LabelText:UR-RD  SortCode:J6  RouteCode:BACT

 4 Accession: 42059514 FES, TEST                                  OE Batch: JAS1911
Client#:23495  Order#:X1010  LabelText:UR-RD  SortCode:J6  RouteCode:BACT

 5 Accession: 42059514 FES, TEST                                  OE Batch: JAS1911
Client#:23495  Order#:X1010  LabelText:UR-RD  SortCode:J6  RouteCode:BACT

 6 Accession: 42059515 FES, TEST                                  OE Batch: JAS1911
```

STEP III: Marking Courier Packing list as picked up	When the courier arrives, access the OSA application and select the "Pick-Up" tab. Select the batch and enter in the couriers name in the "Courier Name's: "field (at least 5 characters) once you enter in the Courier the "Pick-Up Sample" button displays. Click on the "Pick-up Sample button. This will cause the batch to be marked as Picked-Up and the samples each marked In Transit.
	Note: The last 14 couriers associated with a pick-up of specimens is included in the drop-down box for the Courier Name: Rather than entering the name, a previous name from the list can be selected.
Micro Accept	When the courier arrives at the Chantilly laboratory, the OSA specimens are delivered directly to the department (microbiology). At this time, a user in the department must access the OSA options and select the Micro Accept tab. **Note, this is a Chantilly function to perform.**

6. RELATED DOCUMENTS

ROB - Creating Batch for Microbiology Sendouts, Microbiology procedure
FES Password, Specimen Processing procedure

7. REFERENCES

None

8. REVISION HISTORY

Version	Date	Reason for Revision	Revised By	Approved By
		Supersedes SOP S006.006		
001	8/14/12	Section 4: Add Maximum batch size, revise courier list retention time, add SOP to FES access code Section 5: Clarification of placing FES Batch end label on ROB Batch list and verifying specimens processed, changes to Print courier packing list Section 6: Update document titles	R. Master L. Barrett	S. Khandagale

9. ADDENDA AND APPENDICES

LIS Micro Orders and Quest Tandem Order Number.

Culture	Quest Order Code	LIS Code	Misys Source(SDES)	Specimen	Condition (Free Text)	Plates	Broth	SGAH/WAH Default # Plates
AFB Culture and Smear	5202	XAFBC1	Fluid	FL	Source of Fluid	0	0	0
AFB Culture and Smear	5202	XAFBC1	Urine	UC	Leave it blank	0	0	0
AFB Culture and Smear	5202	XAFBC1	Tissue	TIS	Container	0	0	0
AFB Culture and Smear	5202	XAFBC1	Sputum	MI	SP	0	0	0
AFB Culture and Smear	5202	XAFBC1	Bronch Wash	MI	BRON	0	0	0
AFB Culture and Smear	5202	XAFBC1	Aspirate Tube	MI	Aspirate Tube	0	0	0
AFB Blood Cutlure	8518	XAFBL1	Blood	BL	Leave it blank	0	0	1 bottle
AFB Smear	268	XAFSM1	Fluid	FL or SW	Source of Fluid	0	0	0
AFB Smear	268	XAFSM1	Urine	UC	Leave it blank	0	0	0
AFB Smear	268	XAFSM1	Tissue	TIS	Leave it blank	0	0	0
AFB Smear	268	XAFSM1	Sputum	MI	Leave it blank	0	0	0
AFB Smear	268	XAFSM1	Bronch Wash	MI	BRON	0	0	0
AFB Smear	268	XAFSM1	Aspirate Tube	MI	Aspirate Tube	0	0	0
AFB Blood Cutlure	8518	XAFBL1	BL	BL	Leave it blank	0	0	1 bottle
Anaerobic Culture	15871	XANAC	any source	FL or SW	Source of Fluid	5		3
Blood Culture / Aer	18100	XIDS	BL	BL	Leave it blank	4		4
Blood Culture / Anaerobe	18101	XIDSN	BL	BL	Leave it blank	5		5
Fungus Blood Culture	14701	XBLF1	BL	BL	Leave it blank	0	0	1 bottle
CSF Culture (and Gm Stain)	127350	XCSFC	CSF	CS	Leave it blank	4	1	5
Cath Tip Culture	78352	XCTIP	Cath	MI	Leave it blank	1		1
Ear Culture	76951	XEAR	Ear	SW or EAR	Leave it blank	4		4
E Coli O157	4221	XECOL	Stool	ST	Leave it blank	1		1
Environmental Culture	6320	XENVR	any source	WATER	Source of culture	1		1
Eye Culture	76950	XEYE	Eye	EYE	Leave it blank	4		4
Fungus Culture (hair,skin, nail)	7998	XFHSN	Hair, Skin, Nail	MI	Hair, Skin, or Nail	0	0	0
Fluid Culture	1273	XFLC	any source	FL	Source of Fluid	4	1	5
Fungus Smear	270	XFSMR1	any source	MI or SW	Leave it blank	0	0	0
Fungus Culture	105	XFUNC1	any source	MI or SW	Leave it blank	0	0	0
Group B Strep Cult Screen	14537	XGBSC	source	SW	Leave it blank	0	1	1
GC Culture Screen	657	XGCS	source	SW	Leave it blank	2		1
Genital Culture	778	XGENC	source	SW	Leave it blank	4		4
Millipore Water	4120	XH20	source	WA	Leave it blank	1		1
MRSA Screen	752	XMRSA	source	any source	Leave it blank	1		1
MRSA PCR	17656	XMRSAP	Nose	SW	Leave it blank	0		0
Respiratory Culture	769	XRESP	source	MI	SP	4		4
Stool Culture	15292	XSTLC	Stool	ST	Swab/Container	0	1	6
Group A Strep Cult Screen	6470	XSTPAS	Throat	SW	Leave it blank	1		1
Surgical Culture	78353	XSURG	any source	TIS	Leave it blank	5		5
MTB Complex TMA Non Resp	18006	XTBNR	any source	MI	Leave it blank	0		0
MTB Complex TMA Resp	6931	XTBRP	any source	MI	Leave it blank	0		0
Throat Culture	5870	XTC	Throat	SW	Leave it blank	2		2
Tissue Culture (and GS)	78350	XTISC	any source	TIS	Leave it blank	5		5
Urine Culture	URINEX	XURNC	Urine	UC	Leave it blank	2		2
Urine Culture (Sterile, bladder, I/O, Suprapubic)	URINEX	XURNC	Urine	UC	Source of Urine	4		4
VRE Culture	8557	XVRE	any source	ST	Leave it blank	1		1
Wound Culture	78351	XWDAC	any source	SW	Leave it blank	4		4
Would Culture (with Gm Stain)	783	XWDCG	any source	SW	Leave it blank	4		4

Form revised 3/31/00