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PATIENT INQUIRIES IN SAFETRACE TX

☒ St. Joseph Medical Center, Tacoma, WA   ☒ St. Anthony Hospital Gig Harbor, WA   ☐ Harrison Medical Center, Bremerton, WA
☒ St. Francis Hospital, Federal Way, WA   ☒ St. Elizabeth Hospital Enumclaw, WA   ☐ Harrison Medical Center, Silverdale, WA
☒ St. Clare Hospital Lakewood, WA   ☐ Highline Medical Center Burien, WA   ☐ PSC

PURPOSE

To describe how to locate miscellaneous patient information which includes test results & subtests, how to perform a patient inquiry regarding products associated with the patient, and how to view the status of units that have been crossmatched as well as any factors that might be on a unit.
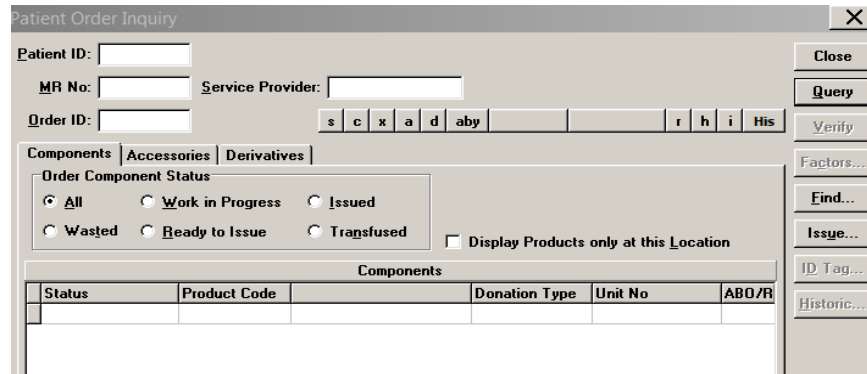
RELATED DOCUMENTS

M-W-TS-0105   Patient History Check
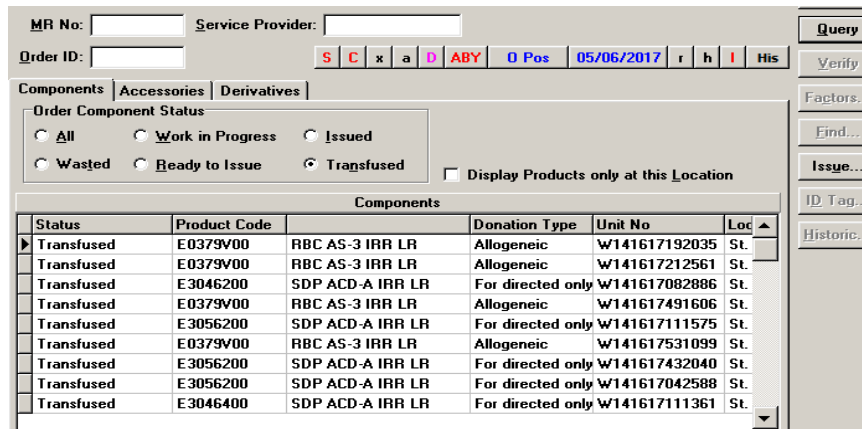M-W-TS-0349   Order Management – SafeTrace Tx

STEPS

Patient Order Inquiry

First search for the patient profile in order to pick up on the Patient ID #. You must know either the Patient ID, the MRN, or the Patient name to get started.

1. In the Patient Order module, select **Product > Patient Order Inquiry**. The Patient Order Inquiry form displays with the '**All**' radio button selected in the Order Component Status group box.
   - Type in the Patient ID
   - Click Query to populate all the units attached to the patient.

- You will notice that not only the product code displays, but also the product name – which makes it easier to count how many of each component type have been transfused

2. Enter desired component search criteria and click the **Query** button. The patient's ordered blood component search results display in the **Components grid**.
   - If no ordered components are found an informational message displays '**No possible matches found.'**

3. **Other functions** that can be performed in Patient Order Inquiry include:
   a. The **Verify button** can be used to verify that a **Ready to Issue** component is indeed ready for issue.
      - This will run the same final checks that are performed at product issue.
      - Be aware that a component can be in "Ready to Issue" status but **final issue checks may fail** for such reasons as the expiration of the related specimen or expiration of the component.
      - This will verify that all components listed in the Components grid are truly ready to issue.
   b. The **Factors button** can be used to indicate why a product in a **Work in Progress** status is still not ready to issue.
      - Only one component at a time may be selected from the Components grid to view prohibiting factors.
   c. The **Issue button** will load the **Product issue form** with information for the patient identified.
   d. The **ID Tag button** will display the **Print Multiple Tag form** with all the components that have the status of Work in Progress or Ready to Issue.
      - From this form, the user can have all the selected product ID tags printed.
   e. The **Historic button** will display the **Conversion History form**.
      - This button will only be enabled if at least one historical record exists for the patient.
      - The user can view information brought into the system through the conversion process using the conversion history form.

4. Click the **Close button to exit** out of the Patient Order Inquiry form.

Review of Previous Test and Subtest Results

1. From the **Patient/Order** module, select **File > Open > Result**. The Open Result window opens.

2. Enter at least one search condition. If desired, multiple search criteria may be entered.
   - Product tests on an order for a patient will display when queried by Order ID, Completed By, and Completed Date range – but NOT by Patient ID
     i. Component tests that were not part of a patient's order will NOT list when the Patient ID is queried
   - When querying by Patient ID, only patient tests will display
   - Component information may be entered either manually or by barcode to query for completed test results for a component

3. Click the **Query** button. The matching tests display on the Completed Tests Grid.

4. Select the desired results from the **Completed Tests** grid and click **OK**

5. The **Result Entry window opens** displaying previously a read-only version of saved test results

6. When finished reviewing the results, close the window

REFERENCES

AABB Standards for Blood Banks and Transfusion Services, current edition

AABB Technical Manual, current edition

DOCUMENT APPROVAL	*Please Complete All Sections*

Purpose of Document:

(to be completed for Forms, Flowcharts and other documents that will be uploaded as attachments to parent documents in PolicyStat)

New document

Was Document Title Changed?	☒ No	☐ Yes – Previous Title: ___NA_____
Was New Document ID # Assigned?	☐ No	☒ Yes – Previous ID #: ___NA_____

Reason for Change:

Attached Documents *(list documents that should be linked/attached to this document in PolicyStat):*

Committee Approval	☐ Required (for multi-site / regional documents) Date Approved: _____ ☒ Required for New Document Date Approved: _____ ☐ N/A – revision of department-specific document which is used at only one facility
Effective Date	☒ As soon as approved by FLOAT and/or uploaded ☐ Specific Date: _____
Medical Director Approval	☐ *No significant change to process in above revision.* *Per CAP, this revision does not require further Medical Director approval.* ☒ *Medical Director approval needed – to be done in PolicyStat.*