Saratoga Hospital Laboratory

211 Church Street, Saratoga Springs, NY 12866

**Procedure for Handling Requisitions & Specimens with Issues**

**Purpose:**

The purpose of this procedure is to standardize the handling of requisitions or specimens received by the Saratoga Hospital Laboratory in which at least one required element is missing, or incorrectly documented.

**Scope:**

This procedure applies to all laboratory employees involved with identifying, investigating, or completing requisitions or specimens received by the Saratoga Hospital Laboratory in which at least one required element is missing, or incorrectly documented.

**Materials:**

* Meditech Terminal
* Issue Bin
* Phlebotomy Refrigerator
* Telephone
* Office Supplies

**Quality Control:**

Issues are monitored daily by Accessioning staff, and the Phlebotomy Coordinator through the Customer Service Issue Statistics Report.

1. Sign into Meditech.
2. Under the **Laboratory Module**, select **36. OUTREACH**.
3. Select **40. Customer Service**.
4. Select **40. Customer Service Statistics**.
5. In the **From Entered Date** field type **T-5** followed by the **Enter** key.
6. In the **Thru Entered Date** field type **T** followed by the **Enter** key.
7. Select the **F12** key on the keyboard to print the report.

***Note: The Phlebotomy Coordinator delegates Issue problem solving to additional staff as needed.***

**Load Issue Tracker Procedure:**

1. Sign into Meditech.
2. Under the **Laboratory Module**, select **36. OUTREACH**.
3. Select **40. Customer Service**.
4. Select **20. Process Issues** to load the Issue Tracker.
5. Select the **F10** key to erase the date in the **From Date** field. Type **T-5**, followed by the **Enter** key.
6. Select the **F12** key on the keyboard.

***Note: All entries in the Issue Tracker are color coded. See Quality Control section of this procedure for details.***

* ***Warning: Issues with Warning targets appear on the Issue Tracker with a warning date assigned. If an Issue is not completed by the Warning date, it appears in YELLOW and is highlighted yellow on the Issue Tracker.***
* ***Target: All Issues have target dates assigned. If an Issue is not completed by the Target date, it appears in RED and is highlighted red on the Issue Tracker.***

**Enter New Issue Procedure:**

***Note: All requisitions for issues that cannot be solved at the time of initial entry are filed in the Issue Bin, in Accessioning.***

1. From the Issue Tracker, type **EN** in the **Function** field to load the **Enter/Edit Outreach Customer Service Issue**.
2. Type lab mnemonics, **LAB.\*\***  in the **Caller** field. Select the **Enter** key to move to the next field.
3. In the **Client** field type **N\*first three letters of the provider*** then the **F9** key to look up the ordering provider of the order with the issue. Select the provider.
4. In the **Subject** field enter a brief description of the issue. For example, Wrong DOB on the Req. Select the **Enter** key to advance to the next field.
5. In the **Comment** field, enter the LISSUE canned comment. Fill in the required fields according to the following example.

|  |
| --- |
| Comments |
| [***Req or Spec***] received in lab with [***DOB***] issue on [***today***] @ [***now***] by [***user***]. |

1. If there is a specimen associated with the issue, use the mouse to select the **Specimen Number** field and enter all specimen numbers associated with the issue. If the requisition is not entered into Meditech, proceed to the next step.
2. Use the mouse to select the **Type** field. Press the **F9** key to view the options for this field. Choose the issue that applies. See Attachment 1: Issue Types for a complete list of options. The curser will automatically advance to the next field.
3. In the **Status** field select the **F9** key to view the options for this field. Choose **OPEN**.
4. Select the **F12** key to followed by the **Y** key to **File**.

**Edit Issue Procedure:**

1. From the Issue Tracker, select the issue to be edited.

***Note: The subject and client information can be seen at the bottom of the Issue Tracker when an issue is selected. The entire issue can be viewed by selecting the Shift and the → at the same time.***

1. Type **ED** in the **Function** field to load the **Enter/Edit Outreach Customer Service Issue**.
2. In the **Comments** field, use the following canned comments to describe the update.
	1. **Micro Specimen Setup:** To be used when a specimen has been setup in Micro.

***Note: Specimens with issues that are setup my Micro are kept in the Micro problem specimen bin.***

* + 1. **LSETUP: [Test] was set up by [Tech] on [today] at [now] - Updated on** **[today] @ [now] by [user].**
	1. **Specimens have been Run:** To be used when a technical department has run a test. The results are to be attached to the patient’s requisition and kept in the Issue Bin.
		1. **LTESTRUN: [Test] was run up by [Tech] on [today] at [now]. Results are** **attached to the requisition. Updated on [today] @ [now] by** **[user].**
	2. **Notification of Issue:** To be used when notifying requisition submitter of that there is an issue with a specimen or the requisition.
		1. LNI: **[Who was notified]** was notified by **[user]** on **[today]** at **[now]**. RB&V
	3. **Generic Issue Update Comment:** This comment is used as a general format to update an issue. Information regarding Irretrievable Specimens should be entered using this comment.
		1. **LIU: Issue Update: [Type Update Here] -Updated on [today] @ [now] by [user].**
1. When initially utilizing the LNI or the **LIU** comments, the **Status** fieldof the issue must be transferred from the **OPEN** status to the **INVG** or investigating status.



1. Select the **F12** key to save the edits to the issue.

**Complete Issue Procedure:**

1. From the Issue Tracker, select the issue to be edited.

***Note: The subject and client information can be seen at the bottom of the Issue Tracker when an issue is selected. The entire issue can be viewed by selecting the Shift and the → at the same time.***

1. Type **ED** in the **Function** field to load the **Enter/Edit Outreach Customer Service Issue**.
2. In the **Comments** field, use the following canned comment to describe what has occurred to that has resolved the issue.
	1. **LICOMP: Issue Complete: [Type how the issue was completed here].- Completed on [today] @ [now] by [user].**
3. To finalize the issue the **Status** field of the issue must be transferred from **INVG** to **COMP** or completed.
4. Select the **F12** key to save the edits to the issue.
5. The issue will display in BLUE on the Issue Tracker with an **Sts** of COMP.

**Quality Assurance:**

A customer service report is generated monthly for review by the Quality Assurance Committee.

1. Sign into Meditech.
2. Under the **Laboratory Module**, select **36. OUTREACH**.
3. Select **40. Customer Service**.
4. Select **30. Customer Service Report**.
5. In the **From Date** field enter the first date of the previous month.
6. In the **Thru Date** field enter the last date of the previous month.
7. Select the **F12** key to print the report.

**Procedural Notes:**

During a Meditech Downtime, Attachment 2: Issue Log will be used to record all issues pertaining to incomplete or inaccurate information on requisitions and/or specimens. After the Meditech Downtime, all issues recorded on Attachment 2: Issue Log will be logged into the Customer Service Issue module in Meditech.

**Attachments:**

Attachment 1: Issue Types

Attachment 2: Issue Log

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Date of Origin: | 04/15/15 |  | Prepared By: | Teri Baldwin |
| **Date Placed in Service:** |  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Approved by: |  |  |  |  |  |  |  |
|  | Phlebotomy SupervisorTeri Baldwin |  | Date |  | Saratoga Hospital Laboratory Medical DirectorWilliam E. Field II, MD  |  | Date |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  | Laboratory Administrative DirectorRichard Vandell |  | Date |  |  |  |  |

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**Attachment 1: Issue Types**

|  |  |
| --- | --- |
| **Mneumonic** | **Name** |
| **MISLABELED** | SPECIMEN MISLABELED |
| **MISMATCH**  | INFO ON REQ & SPEC DONT MATCH |
| **MISS INFO** | MISSING INFORMATION ON REQ |
| **MISS SIG**  | MISSING SIGNATURE ON REQUISITION |
| **NO SPECREC** | NO SPECIMEN RECEIVED |
| **ORDERS** | QUESTIONABLE ORDERS ON REQ |
| **UNLABELED** | SPECIMEN UNLABELED |
| **UNSUITABLE** | UNSUITABLE SPECIMEN |
| **VERIFY** | VERIFY INFORMATION ON REQ |
| **WRNG DOB** | WRONG DOB ON SPECIMEN |
| **WRNG SPEC**  | WRONG SPECIMEN RECEIVED |
| **WRONG INFO**  | INCORRECT INFORMATION ON REQ |
| **XTRA SPEC** | EXTRA SPECIMEN RECEIVED |

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**Attachment 2: Issue Log**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Date** | **Time** | **Patient Name** | **Patient DOB** | **Issue** | **LAB.\*\*\*** |
|  |  |  |  |  |  |
| **Was the specimen run and results/was the culture setup.** | **Y N** | **By lab.\_\_\_\_\_\_** | **Location of the specimen Phleb Fridge Walk-In Xtra Rack Freezer** |
| **Issue Update:** |
|  |
|  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Date** | **Time** | **Patient Name** | **Patient DOB** | **Issue** | **LAB.\*\*\*** |
|  |  |  |  |  |  |
| **Was the specimen run and results/was the culture setup.** | **Y N** | **By lab.\_\_\_\_\_\_** | **Location of the specimen Phleb Fridge Walk-In Xtra Rack Freezer** |
| **Issue Update:** |
|  |
|  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Date** | **Time** | **Patient Name** | **Patient DOB** | **Issue** | **LAB.\*\*\*** |
|  |  |  |  |  |  |
| **Was the specimen run and results/was the culture setup.** | **Y N** | **By lab.\_\_\_\_\_\_** | **Location of the specimen Phleb Fridge Walk-In Xtra Rack Freezer** |
| **Issue Update:** |
|  |
|  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Date** | **Time** | **Patient Name** | **Patient DOB** | **Issue** | **LAB.\*\*\*** |
|  |  |  |  |  |  |
| **Was the specimen run and results/was the culture setup.** | **Y N** | **By lab.\_\_\_\_\_\_** | **Location of the specimen Phleb Fridge Walk-In Xtra Rack Freezer** |
| **Issue Update:** |
|  |
|  |