



<b>University of Washington Medical Center</b> <b>1959 NE Pacific Street. Seattle, WA 98195</b> <b>Transfusion Services Laboratory</b> <b>Policies and Procedures Manual</b>	<b>Original Effective Date:</b> <b>02-11-16</b>	<b>Number:</b> <b>PC-0039.03</b>
	<b>Revision Effective Date:</b> <b>08-14-18</b>	
<b>TITLE: Patient History Check (HXCK)</b>		

**PURPOSE:**

To provide instructions on how to perform patient historical check in the Sunquest LIS

**PRINCIPLE & CLINICAL SIGNIFICANCE:**

A review of historical testing records is required by AABB Standards to ensure any discrepancies with historical type, difficulty in typing and previous history of antibodies are identified. This step is critical to the safety of transfusion by ensuring that antibodies from previous testing are not missed due to weak reactivity below the limits of detection. Review of the patient historical record also includes review of required product attributes and special processing such as volume reduction of platelets.

**POLICIES:**

- The history check is documented in Sunquest (SQ) Blood Order Processing (BOP) on the history check test
- Antigen negative red blood cell components should be provided for all historical clinically significant antibodies regardless of testing facility
- ABO/Rh testing performed at sites other than the UWMC TSL are not considered valid for transfusion purposes and do not display under the **Accessions** tab in Blood Bank Inquiry
- All SCCA patients must be provided irradiated blood products and the Irradiated (IRR) attribute must be added to the Blood Administrative Data (BAD) file in SQ if not already present.
- UWMC and SCCA patients use “U” medical record numbers. The records of linked Harborview patients (identified by medical record numbers starting with “H”) must be reviewed and any antibodies, product attributes and special requirements should be honored
- Any new attributes should be added to the patient SQ record at the time of order receipt:
  - Clinical laboratory technicians (CLT) should ask a medical laboratory scientist (MLS) to update the record at the time of order receipt
  - Medical laboratory scientists (MLS) should update records upon identification of new requirement and requested by CLT staff
- Order requisitions should be reviewed for the following and the patient recorded updated when needed following the instruction in the SOP
  - **Blood Bank Requirements (BBR)** is an alert of patient clinical status that requires blood components with special testing, attributes or additional component processing. A requisition listing blood bank requirements may print independent of a product order or be listed on the product order.

<b>TITLE: Patient History Check (HXCK)</b>	<b>Number: PC-0039.03</b>
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- **Attributes** are additional blood component tests or processing required. Attributes are intended to interface between ORCA and SQ and automatically update the patient's BAD file; although there may still be situations when the attribute will not be automatically updated. Attributes in SQ act as an electronic hardstop preventing the issue of blood components that do not meet these attributes. Attributes consist of:
  - **Irradiation, Washed and Hgb S** are requirements that may interface to the Transfusion attribute tab in the patient's SQ BAD file if order is available in SQ General Laboratory.
  - **Volume Reduced** attribute does not update the Transfusion attribute tab in the patient's SQ BAD file
- **Special Requirements** specify the type of platelet component a patient with restrictions may receive (refer to SOP *Selection of Platelet Component*)

**REAGENTS/SUPPLIES/EQUIPMENT:**

Reagents:	Supplies:	Equipment:
NA	Test or Component Requisition	LIS

**QUALITY CONTROL:**

NA

**INSTRUCTIONS:**

- [History Check when Receiving All Orders](#)
- [History Check when Performing Testing](#)
- [History Check when Receiving Product Orders](#)
- [History Check when Allocating or Issuing Blood Components](#)

**History Check when Receiving All Orders**

STEP	ACTION	
1	Stamp the paper requisition with History Check Stamp	
2	Open Blood Bank Inquiry (BBI) in Sunquest (SQ)	
3	Select <u>L</u> ookup by 'PatientID' and enter the patient medical record number (MRN)	
4	Determine if the patient has multiple medical record numbers (MRN) with the same name and date of birth (e.g. UWMC/SCCA "U", Harborview "H") Go to ORCA Powerchart, type in U#, enter. Patient H# will be listed next to the U#s for the patient. MRN in parenthesis ( ) are inactive numbers for the patient. Only one U# should be current for a patient	
	If the Patient has	Then
	Only a "U" MRN	Go to the next step
A combination of "H" and "U" MRNs	The records must be linked in SQ to ensure any antibodies and special product requirements will display at both sites. Refer to SOP <i>Patient Record Maintenance</i>	

STEP	ACTION			
6	<b>Review the requisition for Blood Bank Requirements</b>			
	<b>Blood Bank Requirement</b>	<b>Action</b>		
	Cancer/BMT/BM failures	<ul style="list-style-type: none"> <li>Check SQ BAD file has Irradiation attribute</li> <li>Update SQ BAD file with IRR attribute if not present</li> </ul>		
	Sickle Cell/Thalassemia	<ul style="list-style-type: none"> <li>Check SQ BAD file has Irradiation and Hgb S attributes</li> <li>Update SQ BAD file with IRR and HBS attribute if not present</li> <li>Refer to SOP <i>Antigen Typing of Red Cells and/or Selection of Red Blood Cell Components</i> for red cell antigen matching requirements</li> </ul>		
	ECMO	<ul style="list-style-type: none"> <li>Check SQ BBI for current type and screen (TSCR)</li> <li>Alert clinical team if no current TSCR</li> <li>Alert on-call UWMC BB MD</li> </ul>		
	Intrauterine Transfusion	<ul style="list-style-type: none"> <li>Check SQ BAD file has Irradiation and Hgb S attributes</li> <li>Update SQ BAD file with IRR and HBS attribute if not present</li> <li>Check SQ BBI for current TSCR</li> <li>Alert clinical team if no current TSCR</li> <li>Alert on-call UWMC BB MD</li> </ul>		
	Solid Organ Transplant	<ul style="list-style-type: none"> <li>Check SQ BBI for current TSCR</li> <li>Alert clinical team if no current TSCR</li> <li>Alert on-call UWMC BB MD</li> </ul>		
	Neonate	<ul style="list-style-type: none"> <li>Check SQ BAD file has Irradiation, Hgb S attribute</li> <li>Update SQ BAD file with IRR and HBS attribute if not present</li> </ul>		
7	<b>Review the requisition for Attributes</b>			
	<b>Requisition</b>	<b>SQ Attributes</b>	<b>If</b>	<b>Then</b>
	Irradiation	Irradiation	No discrepancy	Go to next step
			Discrepancy	<ul style="list-style-type: none"> <li>Go to step 8 and update BAD file with IRR attribute</li> </ul>
	Washed	Washed	No discrepancy	Go to next step
			Discrepancy	<ul style="list-style-type: none"> <li>Update BAD file with Washed attribute</li> <li>Review with MLS Lead/Manager</li> <li>Notify TSL MD on call</li> </ul>
	Hgb S	HBS	No discrepancy	Go to next step
			Discrepancy	<ul style="list-style-type: none"> <li>Update BAD file with HBS attribute</li> <li>Review with MLS Lead/Manager</li> </ul>

<b>TITLE: Patient History Check (HXCK)</b>	<b>Number: PC-0039.03</b>
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STEP	ACTION			
	<b>Requisition</b>	<b>SQ Attributes</b>	<b>If</b>	<b>Then</b>
	Volume Reduced	RV instructions in the comments field	No discrepancy	Go to next step
			Discrepancy	<ul style="list-style-type: none"> <li>Review with MLS Lead/Manager</li> <li>Notify TSL MD on call</li> </ul> <p><b>NOTE:</b> RV instructions will be entered to the BAD file by TSL Managers</p>
8	<b>Review the requisition for Special Requirements</b>			
	<b>Requisition</b>	<b>SQ Comments</b>	<b>If</b>	<b>Then</b>
	Apheresis	Apheresis only, may be specific for PAS or plasma apheresis	No discrepancy	Go to next step
			Discrepancy	<ul style="list-style-type: none"> <li>Review with MLS Lead/Manager</li> <li>Notify TSL MD on call</li> </ul>
	HLA	HLA selected or HLA matched	No discrepancy	Go to next step
			Discrepancy	<ul style="list-style-type: none"> <li>Review with MLS Lead/Manager</li> <li>Notify TSL MD on call</li> </ul>
	Pooled	Pooled only	No discrepancy	Go to next step
			Discrepancy	<ul style="list-style-type: none"> <li>Review with MLS Lead/Manager</li> <li>Notify TSL MD on call</li> </ul>
9	Record Tech ID in the appropriate area of the History Check Stamp as indication the history check is complete			

### History Check when Receiving Product Orders

STEP	ACTION	
1	Verify required testing is complete	
	<b>If order is for</b>	<b>The following is required</b>
	TRBC, TGRAN, (Red blood cell or granulocyte components)	<ul style="list-style-type: none"> <li>Two ABO/Rh test results from two independently collected specimen with testing performed by UWMC Blood Bank</li> <li>In-date type and screen test (expires 3 days after collection) <ul style="list-style-type: none"> <li>TSCR</li> <li>TXM</li> <li>TSCREX – may be activated up to 30 days from collection if notified the patient qualifies for extension</li> <li>BBHold – may be converted to a TXM using the original collection date</li> </ul> </li> </ul>

STEP	ACTION	
	<b>If order is for</b>	<b>The following is required</b>
	TNRBC	Type and screen performed on the Cord Blood or peripheral blood specimen  <b>NOTE:</b> Current maternal antibody screen may be used when an antibody screen cannot be performed on the patient
	TPLT, TFFP, TCRYO (platelet, plasma, cryoprecipitate)	ABO/RH: may be from a previous admission performed at UWMC Blood Bank

**History Check when Performing Testing**

STEP	ACTION	
1	Perform a history check in SQ Blood Order Processing (BOP)  <b>NOTE:</b> Alternatively, this information may be reviewed in other SQ functions such as Blood Bank Inquiry (BBI)	
2	Review the SQ BAD file ABORh	
3	<b>Click on the following buttons</b>	<b>Review for the following</b>
	Demographics	<ul style="list-style-type: none"> <li>• Problems</li> <li>• Antigen/Antibodies</li> <li>• Comments                             <ul style="list-style-type: none"> <li>○ Bone Marrow Transplant (BMT) recipient and donor types</li> <li>○ Difficulties in testing</li> </ul> </li> </ul>
	Linked/Archived	Displays information listed under the demographics button that is specific to a linked or archived patient record, most often from another UW institution
	History	<ul style="list-style-type: none"> <li>• Previous test results</li> <li>• Review all testing for the past 12 months for prenatal orders</li> </ul>
4	Resolve any discrepancies prior to interpreting or saving test results	
5	Go to section <b>Results Reporting in Sunquest</b>	

**History Check when Allocating or Issuing Blood Components**

STEP	ACTION	
1	Go to section <i>History Check when Receiving Blood Component Orders</i> and verify testing is complete	
2	Perform a history check in SQ Blood Order Processing (BOP)  <b>NOTE:</b> Alternatively, this information may be reviewed in other SQ functions such as Blood Bank Inquiry (BBI)	

<b>TITLE: Patient History Check (HXCK)</b>	<b>Number: PC-0039.03</b>
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STEP	ACTION	
3	Review the SQ BAD file ABORh	
4	<b>Click on the following buttons</b>	<b>Review for the following</b>
	Demographics	<ul style="list-style-type: none"> <li>• Problems</li> <li>• Antigen/Antibodies</li> <li>• Comments <ul style="list-style-type: none"> <li>○ Bone Marrow Transplant (BMT) recipient and donor types</li> <li>○ Special requirements for platelet orders <ul style="list-style-type: none"> <li>▪ Volume reduced</li> <li>▪ Component type</li> </ul> </li> <li>○ Plasma/Cryo restrictions</li> </ul> </li> <li>• Attributes <ul style="list-style-type: none"> <li>○ Irradiation</li> <li>○ Hgb S</li> <li>○ Washed</li> </ul> </li> </ul>
	Linked/Archived	Displays information listed under the demographics button that is specific to a linked or archived patient record, most often from another UW institution
	History	Current and previous test results

**CALCULATIONS/RESULTS REPORTING/NORMAL VALUES/CRITICAL VALUES**  
**Results Reporting in Sunquest**

STEP	ACTION		
1	Document the results of the history check in Blood Order Processing (BOP) on the history check test		
2	<b>If a previous record is</b>	<b>Then enter</b>	<b>SQ Hot Key</b>
	Found	Pt History Found	HXF (H)
	<b>NOT</b> found	No Patient History Found	HXNF (Q)

**PROCEDURE NOTES AND LIMITATIONS:**

The TSL is notified by clinical staff of patient TSCREX eligibility on day of procedure  
TSCREX eligibility verification is e-mailed to the TSL department the day prior to scheduled surgery or can also be looked in up in ORCA on the pre-op checklist

**REFERENCES:**

AABB, Standards for Blood Banks and Transfusion Services, Current Ed.

**RELATED DOCUMENTS:**

- SOP *Patient Record Maintenance*
- SOP *Selection of Platelet Component*
- SOP *Antigen Typing of Red Cells*
- SOP *Selection of Red Blood Cell Components*

<b>TITLE: Patient History Check (HXCK)</b>	<b>Number: PC-0039.03</b>
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<b>UWMC SOP Approval:</b>	
<b>UWMC CLIA Medical Director</b>	_____ Date _____
	Mark H. Wener, MD
<b>Transfusion Service Manager</b>	_____ Date _____
	Nina Sen
<b>Compliance Analyst</b>	_____ Date _____
	Christine Clark
<b>Transfusion Service Medical Director</b>	_____ Date _____
	John R. Hess, MD
<b>UWMC Biennial Review:</b>	
	_____ Date _____
	_____ Date _____

**REVISION HISTORY:**

10/3/16: Added the use of a stamp to record review of irradiation needs to each requisition and addition of the irradiation attribute to the patient record in Sunquest when applicable. Step 11 revised for clarity.

8/14/18: Revised for implementation of interfaced inpatient product orders.

8/23/18: Added 12-month review of patient test records for prenatal test orders to section History Check when Performing Testing, step3. New signatures not required.