



University of Washington Medical Center 1959 NE Pacific Street. Seattle, WA 98195 Transfusion Services Laboratory Policies and Procedures Manual	Original Effective Date: 05/19/2020	Number: PC-0076.02
	Revision Effective Date:	
TITLE: Transfusion Service Specimen and Test Order Receipt at Northwest Campus		

PURPOSE:

To provide policies and instructions for verifying specimens are acceptable for testing and receiving orders for testing at the University of Washington Transfusion Services Laboratory (UWMC TSL).

LOCATION:

Northwest TSS

PRINCIPLE & CLINICAL SIGNIFICANCE:

Specimen collection is a critical step in the process, as errors in collection and labeling of the specimen can lead to fatal hemolytic transfusion reactions. To prevent adverse reactions due to mislabeled specimens, University of Washington Medical Center (UWMC) and UWMC TSL have defined requirements for specimen collection, specimen labeling and matching the specimen label with the associated order requisition.

POLICIES:

- Orders should be looked up by scanning the specimen label. If scanning is not an available option, the patient's medical record number (MRN) may be keyed in by hand.
- UWMC has specific requirements for the collection and labeling of specimens sent to and tested by the UWMC TSL
 - Specimen containers must be labeled in the presence of the patient at the time of collection.
 - Patient identification must be legible on the specimen container.
 - **SPECIMENS** must be labeled with the following:
 - Patient's full name as it appears on the armband and in Sunquest (SQ)
 - Patient's Medical Record Number (MRN)
 - Date and time of collection - The year is not required. Samples will not be rejected if the year is discrepant.
 - Phlebotomist and verifier's signature or Sunquest (SQ) Tech ID - Nursing policy at UWMC requires the signature of the phlebotomist and a second licensed clinician who is verifying identification of the patient and specimen labeling in addition to the signature of the phlebotomist
 - Indelible ink.

- The specimen must be accompanied by a matching test requisition.
 - If the test requisitions arrives separate from the specimen, the specimen should be rejected and a new collection requested.
 - **TEST REQUISITIONS** must include the following:
 - Patient's full name as it appears on the armband and in SQ
 - Patient's Medical Record Number (MRN)
 - Phlebotomist and verifier's signature - Nursing policy at UWMC requires the signature of a second licensed clinician who is verifying identification of the patient and specimen labeling in addition to the signature of the phlebotomist
 - Date of collection – Test requisitions print with the date on the form. When the printed date on the test requisition matches the date of collection on the specimen label, the phlebotomist or verifier does not need to write the date and the time of collection on the test requisition

- The UWMC TSL will not accept mislabeled or unlabeled specimens.
 - Mislabeled specimens include:
 - Specimens that are not labeled
 - Specimens that are not labeled with both the patient full name and MRN
 - Specimens labeled with a patient name or medical record number different from that on the accompanying test requisition
 - Specimens drawn or removed from the correct patient, but labeled with the wrong patient identification (patient hospital number, full patient name or date of birth)
 - Specimens labeled with more than one label with conflicting patient identification
 - Specimens with labels and requisitions that match, but have been drawn or removed from a different patient (wrong blood in tube)
 - Specimens labeled with appropriate identifiers but accompanied by test requisitions with patient identifiers from two or more patients, even if one set of identifiers on the test requisitions matches the identifiers on the specimen

CRITICAL: Specimen may not be relabeled, information on the sample cannot be corrected and the sample cannot be returned to the nursing unit for any corrections. If a sample cannot be recollected, contact the UWMC TSL Physician-On-Call (POC) for written approval to accept the specimen for testing. The UWMC TSL POC is the only provider who can approve a mislabeled specimen for testing. This does not include the laboratory medicine resident or fellow.

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- **Cord Blood specimens and Cord Blood Neonatal Evaluation (CORDBT) orders:**
 - Cord blood specimens and accompanying requisitions must meet all requirements specified in this procedure.
 - Not all cord blood specimen require testing. Indications for testing are **ANY** of the following:
 - Mother is Rh neg
 - Mother is group O
 - No ABO/Rh is available on the mother
 - Mother does not have a current antibody screen
 - Mother has a positive antibody screen or no history on file
 - When testing is not indicated due to mother’s history, the order should be canceled, a BBHOLD order placed and the specimen and original requisition sent to UWMC TSL.
 - Cord blood specimens labeled with the mother’s label are NOT acceptable for testing.
- Orders placed in Soarian by the provider are interfaced with SQ and received in SQ using the ‘General Laboratory function. Orders placed on a manual Transfusion Services Test & Blood Product Request Form (UH3364) will need to be ordered in SQ by NW TSS Laboratory staff using the ‘Order Entry’ Function. The exception are Cord Blood Neonatal Evaluation test when the provider will enter the order in Soarian, and the RN uses the manual Cord Blood Neonatal Evaluation requisition to document the phlebotomist and verifier’s signatures or SQ Tech ID.

SPECIMEN REQUIREMENTS:

- 1-6 mL of blood in an appropriately labeled Pink (EDTA), Lavender (EDTA) or Red Top (no additive) Tube.
- Samples must be received within 24 hours of collection and tested within three days of collection. Samples may be stored in the laboratory at 2-6°C, if testing is not performed immediately.

REAGENTS/SUPPLIES/EQUIPMENT:

Reagents:	Supplies:	Equipment:
<ul style="list-style-type: none"> ● NA 	<ul style="list-style-type: none"> ● Accession Labels ● Completed Test Requisition 	<ul style="list-style-type: none"> ● LIS ● Bar-code reader ● Time stamp

QUALITY CONTROL:

NA

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INSTRUCTIONS:

- [Specimen Receipt and Acceptability](#)
- [Receiving Test Orders Found in SQ](#)
- [Entering and Receiving Test Orders NOT Found in SQ](#)
- [Receiving Cord Blood Specimens](#)
- [Labeling and Routing Specimens and Requisitions](#)
- [Rejecting Specimens and Canceling Orders](#)
- [Appendix A: Sunquest Test/Battery Order Codes](#)
- [Appendix B: Cancellation Codes](#)

Specimen Receipt and Acceptability

STEP	ACTION	
1	Confirm specimen is <ul style="list-style-type: none"> • Collected in the correct container • Labeled with the following <ul style="list-style-type: none"> ○ Patient full name ○ Medical Record Number (MRN) ○ Date and time of collection (Circled Date of service printed on the label is acceptable as the collection date – year is not required and should not be rejected if discrepant) ○ 2 signatures or SQ Tech ID (phlebotomist and verifier) 	
2	Verify requisition has 2 signatures (phlebotomist and verifier)	
3	Verify the following information matches EXACTLY on the specimen, the requisition and in SQ: <ul style="list-style-type: none"> • Patient full name (middle name/initial or generational title is not required, but must not be discrepant) • Patient MRN 	
4	If	Then
	All information is present and correct	If test is for
		Then
		Cord Blood Evaluation
	All other test	Go to section Receiving Test Orders Found in Sunquest
	Any information is missing or discrepant	<ul style="list-style-type: none"> • Do NOT receive the order • Go to section Rejecting Specimens and Canceling Orders <p>CRITICAL: Specimen may not be relabeled, information on the sample cannot be corrected and the sample cannot be returned to the nursing unit for any corrections.</p>

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Receiving Test Orders Found in SQ

STEP	ACTION
1	Verify specimen and requisition meet all requirements in section Specimen Receipt and Acceptability , above.
2	Select "General Laboratory" function in SQ.
3	Click on 'Orders' and select <Orders Receipt//Modify> (Order Access box will open).
4	Enter/Scan the MRN from the specimen. Click <Get Patient> and select the correct patient if the 'Patient Select' box appears.
5	Click <Display Orders> and highlight the appropriate order.
6	Update and/or enter the following information in the 'General Information' box: <ul style="list-style-type: none"> Collection Date and Time – update to the collection date and time on the specimen Received Date and Time (Type T for today, <TAB> to accept default of now) Click <SAVE>
7	<ul style="list-style-type: none"> Update the container type, if necessary Add any additional samples if collected Click <Route>
8	<ul style="list-style-type: none"> Click <SAVE>, when Result Entry Box appears Update, if necessary to the collection date and time on the specimen Accession (ACC#) and containers labels (CID#) will print
9	Go to section Labeling and Routing Specimens and Requisitions .

Entering and Receiving Test Orders NOT Found in SQ

STEP	ACTION
1	Verify specimen and requisition meet all requirements in section Specimen Receipt and Acceptability above.
2	Select 'Order Entry' (OE) in SQ.
3	Select "Patient ID" from the 'Lookup by' field and scan the patient's MRN in the 'Value' field.
4	Click <Search>.
5	Verify the correct patient is selected.
6	Highlight the correct "Event" (account #) and click <Search>.
7	Enter Collection Date/Time of the specimen.
8	Enter Receive Date/Time from time stamp on the requisition.
9	Enter any additional info provided (Physician 6 digit #, Comments).

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STEP	ACTION						
10	Enter Diagnosis Code if required						
	<table border="1"> <thead> <tr> <th>If patient is</th> <th>Then the diagnosis code form the provider is</th> </tr> </thead> <tbody> <tr> <td>Outpatient or ER</td> <td> <ul style="list-style-type: none"> Required Enter code from requisition </td> </tr> <tr> <td>Inpatient</td> <td> <ul style="list-style-type: none"> Not required Enter NDX, if no diagnosis is provided </td> </tr> </tbody> </table>	If patient is	Then the diagnosis code form the provider is	Outpatient or ER	<ul style="list-style-type: none"> Required Enter code from requisition 	Inpatient	<ul style="list-style-type: none"> Not required Enter NDX, if no diagnosis is provided
	If patient is	Then the diagnosis code form the provider is					
Outpatient or ER	<ul style="list-style-type: none"> Required Enter code from requisition 						
Inpatient	<ul style="list-style-type: none"> Not required Enter NDX, if no diagnosis is provided 						
11	Enter the code for the test in the 'Order Code' field.						
12	Enter the priority in the 'Modifier' field						
	<table border="1"> <thead> <tr> <th>If priority is</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>Routine</td> <td>Go to next step</td> </tr> <tr> <td>Stat</td> <td>Enter 'S' Go to next step</td> </tr> </tbody> </table>	If priority is	Then	Routine	Go to next step	Stat	Enter 'S' Go to next step
	If priority is	Then					
Routine	Go to next step						
Stat	Enter 'S' Go to next step						
13	Click <SAVE>.						
14	Update the container type, if necessary.						
15	Click <Route>.						
16	Click <Save>.						
17	Go to section Labeling and Routing Specimens and Requisitions .						

Receiving Cord Blood Specimens

STEP	ACTION				
1	Review the mother's medical record to determine if cord blood testing is indicated. NOTE: If the mother's identification is not on the requisition, call the RN for the mother's information and document it on the requisition.				
2	Select 'Laboratory Inquiry' function in SQ.				
3	Enter the mother's MRN .				
4	Perform a history check of the mother's medical record to determine if ANY of the following apply: <ul style="list-style-type: none"> Is Rh negative Is Group O Has no blood type on file Has a history of a positive antibody screen, no current antibody screen or no history on file (a current pregnancy antibody screen is required) 				
	<table border="1"> <thead> <tr> <th>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>None of the conditions are met</td> <td> <ul style="list-style-type: none"> Cancel order following section Rejecting Specimens and Canceling Orders: Steps 4 thru 12. Place a new order for a BBHOLD in SQ following section </td> </tr> </tbody> </table>	If	Then	None of the conditions are met	<ul style="list-style-type: none"> Cancel order following section Rejecting Specimens and Canceling Orders: Steps 4 thru 12. Place a new order for a BBHOLD in SQ following section
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STEP	ACTION	
		Entering and Receiving Test Orders NOT found in Sunquest above.
	ANY of the conditions are met	<ul style="list-style-type: none"> Go to section Receiving Test Orders Found in Sunquest and receive the 'CORDBT' order in SQ.

Labeling and Routing Specimens and Requisitions

STEP	ACTION	
1	Verify information on the ACC# and CID# labels match the specimen and requisition and adhere the labels as follows	
	If	Then
	Specimen	<ul style="list-style-type: none"> Initial the CID# label as verification the information matches Adhere the label lengthwise in a manner to leave the name and MRN on the original label visible NOTE: If additional CID# labels are required, adhere in a manner allowing the original CID#, name and MRN to remain visible.
	Requisition	Attach the ACC# label
2	Batch and send the specimen with accompanying requisition to UWMC TSL (Refer to <i>SOP Batching and Transport of Transfusion Service Specimens</i>)	

Rejecting Specimens and Canceling Orders

STEP	ACTION	
1	Notify the patient's nurse the specimen is unacceptable for testing and the need for re-collection and document the following on the order request: <ul style="list-style-type: none"> Name of person notified Summary of the conversation Date & Time of notification Tech ID 	
2	Initiate a Quality Improvement (QI) form and HC1 case	
3	<ul style="list-style-type: none"> Attach the following to the QI form Requisition Photocopy of the label, if the specimen is rejected due to an unacceptable label issue Send a copy of the QI and attachments to UWMC TSL via fax	
4	If the order is	Then
	NOT received in SQ	Go to the next step
	Received in SQ	Notify the UWMC TSL the order needs to be canceled. NOTE: Once an order is received, SQ requires cancelation by a MLS staff member using the SQ 'Blood Order Processing' function.

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STEP	ACTION
5	<ul style="list-style-type: none"> • Select 'General Laboratory' in SQ • Click <Orders> • Click <Credit>
6	Click on the 'Remove results' radio button in the Credit Mode box.
7	<ul style="list-style-type: none"> • Enter or scan the order's accession number • Click <Inquiry>
8	<ul style="list-style-type: none"> • Highlight the order • Click <Inquiry>
9	<ul style="list-style-type: none"> • Enter 'Cancel Reason' code (refer to Appendix B: Cancellation Codes in the Cancel Reason field) • Click <OK>
10	<p>An alert will appear "crediting the order will remove the results. Do you wish to continue?"</p> <ul style="list-style-type: none"> • Select <continue> to cancel the order and remove results.
11	<p>A second Credit pop-up will appear 'All unit allocation record will also be deleted'</p> <ul style="list-style-type: none"> • Click <OK>
12	Click <Cancel> (do not exit from General Laboratory, before clicking <Cancel>)
13	Discard the specimen, per standard laboratory procedure

CALIBRATION:

NA

PROCEDURE NOTES AND LIMITATIONS:

NA

REFERENCES:

- Technical Manual. Bethesda, MD: AABB Press, current edition
- Standards for Blood Banks and Transfusion Services. Bethesda, MD: AABB Press, current edition

RELATED DOCUMENTS:

SOP Batching and Transport of Transfusion Service Specimens
FORM QI Report

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UWMC SOP Approval:		
CLIA Medical Director	<u>Mark Wener</u> Mark H. Wener, MD	Date <u>10/20/20</u>
Transfusion Service Manager	<u>Nina Sen</u> Nina Sen	Date <u>10/20/20</u>
Transfusion Service Compliance Analyst	<u>Christine Clark</u> Christine Clark	Date <u>10-20-2020</u>
Transfusion Service Medical Director	<u>Monica Pagano</u> Monica Pagano, MD	Date <u>10-20-2020</u>
UWMC Biennial Review:		
		Date _____
		Date _____

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APPENDICES:

Appendix A: Sunquest Test/Battery Order Codes

Sunquest Order Code	Test Name
ABRH	Blood Type
ABRH2	Blood Type Confirmation
ABSCR	Antibody Screen
ABTIGG	Ab Titer RBC IgG or Allo Ab
BBHOLD	Blood Bank Hold Sample
BBRH	Rh Only
CORDBT	Cord Blood/Neonate Type/DAT
DAT	Direct Antiglobulin Test
PREN	Prenatal Testing
RHEV	Rh Immune Globulin Evaluation
TRRX	Transfusion Reaction Workup
TSCR	Type and Screen
TSCREX	Type and Screen, Extended

Appendix B: Cancellation Codes

Text Code	Translation
YCUT	Reorder requested. Blood bank labeling requirements not met.
YDATE	Reorder requested. Draw date missing from Blood bank request or specimen.
YLBTSS	Reorder requested. Sample mislabeled, incorrect patient.
YPAC	Reorder requested within three days of surgery. Preadmission requirement not met.
YSIG	Reorder requested. Signature missing from Blood bank request or specimen.
YBROK	Reorder requested, sample broken or spilled in transit
YDATA	Data entry correction, see updated information
YDUP	Duplicate request
YIMP	Reorder requested, improper tube/sample type
YLACC	Reorder requested, laboratory accident
YLOST	Reorder requested, sample lost
YNR	Not required
YNSR	Reorder requested. No sample received.
YPROV	Canceled by practitioner
YWLAB	Wrong test selected by laboratory
YWPRO	Cancel, Wrong Test Ordered by Practitioner