



University of Washington Medical Center
1959 NE Pacific Street, Seattle, WA 98195
Transfusion Services Laboratory
Policies and Procedures Manual

Original Effective Date:
03-11-16
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03/27/2021

Number:
PC-0040.06

TITLE: Specimen Acceptability and Receiving Test Orders

PURPOSE:

To define specimen acceptability for use in the University of Washington Medical Center-Transfusion Services Laboratory (TSL) and how to maintain records of specimen and order receipt within the laboratory.

PRINCIPLE & CLINICAL SIGNIFICANCE:

Specimen collection is a critical step in the pre-transfusion process and errors in labeling of samples can lead to misidentification and fatal hemolytic transfusion reactions

POLICIES:

- The following test orders should be processed as **STAT** even if ordered as routine by the provider:
 - Operating Room orders
 - Emergency Department orders
 - Test orders associated with a Massive Transfusion Protocol (MTP) activation
- Patient's at UWMC (Northwest, Montlake, SCCA) and Harborview Medical Center have the same medical record number. The correct record is determined by the HID. HID=U for UWMC patients:

| Name | Patient ID | HID | Date of Birth | Sex | Status |
|---------------|------------|-----|---------------|-----|--------|
| ZZTEST,FRI... | U9035893 | U | 10/23/1962 | F | ACT |
| ZZTEST,FRI... | U9035893 | H | 10/23/1962 | F | PRE |



- **ALL SPECIMENS** must be accurately labeled to ensure patient safety and prevent errors in patient diagnosis and treatment secondary to misidentified specimens. The UWMC TSL will not accept mislabeled or unlabeled specimens. **CRITICAL:** Specimen may not be relabeled, information corrected or sample returned to the nursing unit. If a sample can not be recollected, contact the TSL MD on-call for written approval to accept and perform testing.
- **SPECIMENS** must be labeled with the following:
 - Patient's first and last name as it appears 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 signature, initials or SQ tech ID
 - 2nd licensed person verifying patient identification signature, initials or SQ tech ID
 - Indelible ink

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- Mislabeled specimens include:
 - Specimens that are not labeled
 - Specimens that are not labeled with two identifiers
 - Specimens labeled with a patient name or medical record number (MRN) different from that on the accompanying 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 and 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 requisitions with patient identifiers from two or more patients, even if one set of identifiers on the requisitions matches the identifiers on the specimen
 - Specimens labeled with truncated names
- 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
- ABO/Rh confirmation specimen collected for pre-transfusion testing must be collected separate and independent from the type and screen (TSCR) specimens and requires a separate verification of patient identifiers. If collected at the same time as the TSCR, reject the sample and request a recollect.
- Specimens for compatibility testing batteries are valid for three days from the date of collection except for type and screen extended specimens (TSCREX). **TSCREX** extension (up to 30 days) is approved based on documentation that the patient has not been transfused or pregnant in the last three months and have no history of antibodies.
- **REQUISITIONS are not required for test orders placed in EPIC that interface to SQ.**
 - Test orders placed in EPIC will interface with Sunquest and be received using SQ General Laboratory function. A requisition is only required when a pending test order is not found in Sunquest.
 - Specimens labeled with EPIC ADT label sent without a requisition
 - Accept if there is a pending TSL SQ order
 - Reject if there is not a pending TSL SQ order
 - Operating rooms will not use EPIC to place test orders. They will use manual requisition UH3364 *Transfusion Services Test & Blood Product Request Form* for test orders. The specimen will be sent with the requisition to the TSL. This may also apply to other clinical locations and during computer downtimes
 - When a requisition is sent, the following apply:
 - Patient's name and MRN matches exactly the name and MRN on the specimen label and Sunquest. If the name and/or MRN are discrepant, the specimen should be rejected and recollection requested
 - Requisitions that do not arrive with the specimen may be accepted as long as the name and MRN match

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| If specimen labeled with | Then |
|---|---|
| SQ label  | <ul style="list-style-type: none"> Specimen will be sent WITHOUT a requisition Receive specimen in SQ Do not relabel the specimen |
| EPIC ADT label  | <ul style="list-style-type: none"> Specimen will be sent WITH a manual requisition <p>NOTE: If no requisition, check SQ for available TSL orders and receive if available. If no order in SQ, reject specimen.</p> <p>Requisition must include the following:</p> <ul style="list-style-type: none"> ○ Patient's full name as it appears on the specimen and in SQ ○ Patient's Medical Record Number (MRN) ○ Test to be performed on collected sample |

SPECIMEN REQUIREMENTS:

- 1-6 mL of blood in an appropriately labeled Pink (EDTA), Lavender (EDTA) or Red Top (no additive) Tube
- Must be received within 24 hours of collection and tested within three days of collection.
- Specimens 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 stamper |

QUALITY CONTROL:

NA

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INSTRUCTIONS:

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- [Processing Cord Blood Orders \(CORDBT\)](#)
- [Processing Type and Screen Extend Orders \(TSCREX\)](#)
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- [Appendix B: Identifying Baby's Mother in EPIC](#)

Specimen Receipt and Acceptability

| STEP | ACTION | |
|------|---|---|
| 1 | Time stamp the requisition if sent with specimen | |
| 2 | 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 first and last name ○ Medical Record Number (MRN) ○ Handwritten date and time (year is not required and should not be rejected if discrepant) ○ 2 signatures, initials or SQ tech IDs (phlebotomist and verifier) | |
| 3 | Verify the following information matches EXACTLY on the specimen, in Sunquest, and the requisitions (if sent): <ul style="list-style-type: none"> • Patient first and last name (middle name/initial or generational title is not required, but must not be discrepant) • Patient MRN | |
| 4 | If | Then |
| | No discrepancies | Go to the next section |
| | Discrepancies | <ul style="list-style-type: none"> • Contact clinical care staff to verify the correct information and what is listed on the patient's armband • Go to section Specimen Rejection <p>CRITICAL: Specimen may not be relabeled, information corrected or sample returned to the nursing unit</p> |

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Receiving Interfaced EPIC/Sunquest Test Orders

| STEP | ACTION | | | | | | | | | | | | | | | | | | | | | |
|---------------|---|--|-------------------------|------|---|------------|-----|---------------|-----|--------|---------------|----------|---|------------|---|-----|---------------|----------|---|------------|---|-----|
| 1 | If test ordered is | Then | | | | | | | | | | | | | | | | | | | | |
| | ALL TEST orders except CORDBT or TSCREX | Go to next step | | | | | | | | | | | | | | | | | | | | |
| | CORDBT | Go to section Processing Cord Blood Orders (CORDBT) | | | | | | | | | | | | | | | | | | | | |
| | TSCREX | Go to section Processing Type and Screen Extend Orders (TSCREX) | | | | | | | | | | | | | | | | | | | | |
| 2 | Perform a patient history check per SOP <i>Patient History Check</i> | | | | | | | | | | | | | | | | | | | | | |
| 3 | If label is | Order is in Sunquest? | Then | | | | | | | | | | | | | | | | | | | |
| | Sunquest label | Yes | Go to next step | | | | | | | | | | | | | | | | | | | |
| | EPIC ADT label or other label | Yes | Go to next step | | | | | | | | | | | | | | | | | | | |
| | | No | If received Requisition | Then | Go to section Sunquest Order Entry and Receipt and order the test | | | | | | | | | | | | | | | | | |
| | | | No Requisition | Then | Go to section Specimen Rejection | | | | | | | | | | | | | | | | | |
| 4 | Select "General Laboratory" function in Sunquest | | | | | | | | | | | | | | | | | | | | | |
| 5 | <ul style="list-style-type: none"> Click on 'Orders' Select <Orders Receipt/Modify> (Order Access box will open) | | | | | | | | | | | | | | | | | | | | | |
| 6 | If labeled with | Then | | | | | | | | | | | | | | | | | | | | |
| | SQ label | <ul style="list-style-type: none"> Select <Container ID> from the dropdown selection Scan container ID from the labeled specimen Click <Get Patient> | | | | | | | | | | | | | | | | | | | | |
| | EPIC ADT label | <ul style="list-style-type: none"> Enter/Scan the MRN from the specimen Click <Get Patient> and select the correct patient if the 'Patient Select' box appears Select patient record under HID location:U <table border="1"> <thead> <tr> <th>Name</th> <th>Patient ID</th> <th>HID</th> <th>Date of Birth</th> <th>Sex</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>ZZTEST,FRI...</td> <td>U9035893</td> <td>U</td> <td>10/23/1962</td> <td>F</td> <td>ACT</td> </tr> <tr> <td>ZZTEST,FRI...</td> <td>U9035893</td> <td>H</td> <td>10/23/1962</td> <td>F</td> <td>PRE</td> </tr> </tbody> </table> <p>NOTE: Order must be placed in the correct location. HID: U belongs to patient at UWMC. HID: H belongs to patient at HMC</p> | | | Name | Patient ID | HID | Date of Birth | Sex | Status | ZZTEST,FRI... | U9035893 | U | 10/23/1962 | F | ACT | ZZTEST,FRI... | U9035893 | H | 10/23/1962 | F | PRE |
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| ZZTEST,FRI... | U9035893 | H | 10/23/1962 | F | PRE | | | | | | | | | | | | | | | | | |
| 7 | Click <Display Orders> and highlight the appropriate order | | | | | | | | | | | | | | | | | | | | | |
| 8 | Update and/or enter the following information in the 'General Information' box <ul style="list-style-type: none"> Collection Date and Time - update the collection date and time from the specimen label Received Date and Time (Type T for today, <TAB> to accept default of now) Enter tech code in the <Phlebotomist Code> if specimen is drawn by a phlebotomist. "Ver 1" on label will be a SQ tech code indicating phlebotomy draw | | | | | | | | | | | | | | | | | | | | | |

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| STEP | ACTION | |
|---|---|--|
| 9 | If | Then |
| | SQ label | <ul style="list-style-type: none"> Click <Receive> Verify checkmark X is next to the CID number that is the same as the labeled specimen Click <SAVE> |
| | EPIC ADT label | <ul style="list-style-type: none"> Update the container type, if necessary Click <Route> Click <SAVE> when Result Entry Box appears. |
| NOTE: Notify Specimen Processing (SPS) if a non TSL order was received in error | | |
| 10 | Accession (ACC#) and containers labels (CID#) will print for specimen with EPIC ADT label | |
| NOTE: Reprint label can be done using SMART function, click <Utilities>, click <Reprint label> | | |
| 11 | Go to section Labeling and Routing Specimens for Testing | |

Sunquest Order Entry and Receipt

| STEP | ACTION | | | | | | | | | | | | | | | | | | |
|---|---|--|---------------|------------|--------|---------------|-----|--------|---------------|----------|---|------------|---|-----|---------------|----------|---|------------|---|
| 1 | Open Order Entry (OE) in Sunquest |  | | | | | | | | | | | | | | | | | |
| 2 | Look up the patient by the MRN | | | | | | | | | | | | | | | | | | |
| 3 | Select patient record under HID location: U | | | | | | | | | | | | | | | | | | |
| | <table border="1"> <thead> <tr> <th>Name</th> <th>Patient ID</th> <th>HID</th> <th>Date of Birth</th> <th>Sex</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>ZZTEST,FRI...</td> <td>U9035893</td> <td>U</td> <td>10/23/1962</td> <td>F</td> <td>ACT</td> </tr> <tr> <td>ZZTEST,FRI...</td> <td>U9035893</td> <td>H</td> <td>10/23/1962</td> <td>F</td> <td>PRE</td> </tr> </tbody> </table> | | Name | Patient ID | HID | Date of Birth | Sex | Status | ZZTEST,FRI... | U9035893 | U | 10/23/1962 | F | ACT | ZZTEST,FRI... | U9035893 | H | 10/23/1962 | F |
| Name | Patient ID | HID | Date of Birth | Sex | Status | | | | | | | | | | | | | | |
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| ZZTEST,FRI... | U9035893 | H | 10/23/1962 | F | PRE | | | | | | | | | | | | | | |
| NOTE: Order must be placed in the correct location.HID: U belongs to patient at UWMC and H belongs to patient at HMC | | | | | | | | | | | | | | | | | | | |
| 4 | Select the correct "Event" (account#) | | | | | | | | | | | | | | | | | | |
| 5 | Enter the collection date and time on the specimen label in the <Collect Date> and <Collect Time> field | | | | | | | | | | | | | | | | | | |
| 6 | Enter the receive date and time from the time stamp on the requisition in the <Receive date> and <Receive time field> | | | | | | | | | | | | | | | | | | |
| 7 | Enter any additional info provided. (Physician 6 digit#,comments) | | | | | | | | | | | | | | | | | | |
| | NOTE: Enter UNK000001 if physician code not available or found | | | | | | | | | | | | | | | | | | |

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| STEP | ACTION | | | | | | |
|--|--|------------------------|------------------------|------------------|---|-----------|---|
| 8 | Enter diagnosis code | | | | | | |
| | <table border="1"> <thead> <tr> <th>If patient is</th> <th>Then diagnosis code 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 diagnosis code 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 diagnosis code 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 | | | | | | |
| <ul style="list-style-type: none"> Enter the appropriate test code using the SQ code – refer to Appendix A: Sunquest Test/Battery Order Codes Enter <S> in the modifier filed if order is STAT <p>NOTE: Operating room, emergency department and MTP orders should be ordered as STAT even if ordered as routine by the provider</p> <ul style="list-style-type: none"> Click <SAVE> | | | | | | | |
| 10 | Click <Route> at the Container and Specimen Entry pop up window | | | | | | |
| 11 | <ul style="list-style-type: none"> Accept the default physician instructions NONE Enter units ordered (%UO) in the Result Entry box. Note: %UO can be updated if there is a pending red cell component order Click <SAVE> | | | | | | |
| 12 | <ul style="list-style-type: none"> Retrieve labels from printer Go to section Labeling and Routing Specimens for Testing | | | | | | |

Labeling and Routing Specimens for Testing

| STEP | ACTION | | | | | | |
|--------------|--|--------------|------|-------------|---|--------------|--|
| 1 | Verify information on the ACC# and CID# labels match the specimen and requisition and adhere the labels as follows | | | | | | |
| | <table border="1"> <thead> <tr> <th>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>Requisition</td> <td>Attach the ACC# label</td> </tr> <tr> <td>Specimen</td> <td> <ul style="list-style-type: none"> Initial the CID# label as verification that specimen acceptability has been checked Adhere the CID# label lengthwise in a manner to leave the name and MRN on the original EPIC ADT label visible. Specimens with SQ label do not need to relabeled unless a new order such as TXM is placed on a BBHOLD Adhere additional CID# labels in a manner allowing the original CID#, name and MRN to remain visible </td> </tr> </tbody> </table> | If | Then | Requisition | Attach the ACC# label | Specimen | <ul style="list-style-type: none"> Initial the CID# label as verification that specimen acceptability has been checked Adhere the CID# label lengthwise in a manner to leave the name and MRN on the original EPIC ADT label visible. Specimens with SQ label do not need to relabeled unless a new order such as TXM is placed on a BBHOLD Adhere additional CID# labels in a manner allowing the original CID#, name and MRN to remain visible |
| | If | Then | | | | | |
| Requisition | Attach the ACC# label | | | | | | |
| Specimen | <ul style="list-style-type: none"> Initial the CID# label as verification that specimen acceptability has been checked Adhere the CID# label lengthwise in a manner to leave the name and MRN on the original EPIC ADT label visible. Specimens with SQ label do not need to relabeled unless a new order such as TXM is placed on a BBHOLD Adhere additional CID# labels in a manner allowing the original CID#, name and MRN to remain visible | | | | | | |
| | | | | | | | |
| 2 | Check samples for clots prior to centrifugation | | | | | | |
| | <table border="1"> <thead> <tr> <th>If clots are</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>Detected</td> <td>Mark across the top of the cap with a Sharpie to indicate that the sample must be tested manually</td> </tr> <tr> <td>Not detected</td> <td>Go to next step</td> </tr> </tbody> </table> | If clots are | Then | Detected | Mark across the top of the cap with a Sharpie to indicate that the sample must be tested manually | Not detected | Go to next step |
| | If clots are | Then | | | | | |
| Detected | Mark across the top of the cap with a Sharpie to indicate that the sample must be tested manually | | | | | | |
| Not detected | Go to next step | | | | | | |
| | | | | | | | |

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| STEP | ACTION | | |
|--------------------------------|---|--------------------------------|--|
| 3 | Centrifuge specimen and check for the following: | | |
| | If | Then | |
| | Low Volume | MLS to assess for recollection | |
| | | Acceptable | Go to next step |
| | | Not Acceptable (QNS) | Go to section ' Specimen Rejection ', the specimen is unacceptable for testing |
| Moderate to Gross Hemolysis | Route the sample to the manual testing bench to prevent delays in testing due to interference with Tango test interpretation. | | |
| Moderate to Gross Lipemia | | | |
| Contamination with I.V. Fluids | Go to section ' Specimen Rejection ', the specimen is unacceptable for testing | | |
| 4 | Route specimens to the appropriate test area based on the following: <ul style="list-style-type: none"> Order priority (Stat vs. Routine): <ul style="list-style-type: none"> Use method that will meet required TAT – Manual may be faster In the case of MTP or emergency blood request, consider performing a manual ABORh to allow issue of compatible plasma components Staffing and Workload Grossly hemolyzed or lipemic specimen: Processing on Vision may result in invalid results Short draw specimen: May be QNS on Vision due to dead space requirements for pipetting Clotted specimen: Test specimen using manual method | | |

Specimen Rejection

| STEP | ACTION | |
|------|--|--|
| 1 | <ul style="list-style-type: none"> Notify the patient's nurse the specimen is unacceptable and needs to be re-collecting if testing is required Document the following on a QI: <ul style="list-style-type: none"> Name person notified Summary of the conversation Date & Time of notification Tech ID | |
| 2 | If order is | Then |
| | Not received in Sunquest | Cancel the order following the instruction in SOP Sunquest: Canceling Orders and Correcting Results |
| | Received in Sunquest | Give sample to a MLS and ask them to cancel the order following SOP Sunquest: Canceling Orders and Correcting Results |

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| STEP | ACTION |
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| 3 | Complete the QI and attach the following to the QI form <ul style="list-style-type: none"> • Requisition if provided • Photocopy of the specimen label |
| 4 | Place the specimen in the unacceptable specimen bin |

Processing Cord Blood Orders (CORDBT)

| STEP | ACTION | | | | | | |
|---------------------------------------|---|------|------|--------------------------------------|---|---------------------------------------|-----------------|
| 1 | Review the mother's medical record to determine if cord blood testing is indicated NOTE: Follow instructions in Appendix B: Identifying Baby's Mother in EPIC to identify the mother or call the RN for the mother's information | | | | | | |
| 2 | <ul style="list-style-type: none"> • Go to Sunquest Blood Bank Inquiry (BBI) • Retrieve the mother's record using the MRN obtained in step 1 above | | | | | | |
| 3 | Perform a history check of the mother's SQ record to determine if the mother: <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 | | | | | | |
| | <table border="1"> <thead> <tr> <th>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>Any of the conditions are met</td> <td> <ul style="list-style-type: none"> • Receive the CORDBT order in SQ according to the appropriate section above – sections Receiving Interfaced EPIC/Sunquest Test Orders or Sunquest Order Entry and Receipt • Go to step 5 </td> </tr> <tr> <td>None of the conditions are met</td> <td>Go to next step</td> </tr> </tbody> </table> | If | Then | Any of the conditions are met | <ul style="list-style-type: none"> • Receive the CORDBT order in SQ according to the appropriate section above – sections Receiving Interfaced EPIC/Sunquest Test Orders or Sunquest Order Entry and Receipt • Go to step 5 | None of the conditions are met | Go to next step |
| | If | Then | | | | | |
| Any of the conditions are met | <ul style="list-style-type: none"> • Receive the CORDBT order in SQ according to the appropriate section above – sections Receiving Interfaced EPIC/Sunquest Test Orders or Sunquest Order Entry and Receipt • Go to step 5 | | | | | | |
| None of the conditions are met | Go to next step | | | | | | |
| | | | | | | | |
| 4 | <ul style="list-style-type: none"> • Cancel order-refer to SOP <i>Canceling Orders and Correcting Results in Sunquest</i> • Reorder test as a BBHOLD according to section Sunquest Order Entry and Receipt • Save sample - refer to SOP <i>Specimen and Unit Segment Management</i> • Go to next step | | | | | | |
| 5 | Enter the mother's information and the baby's MRN on the Cord Blood Log for all cord blood specimens regardless of order placed (CORDBT or BBHOLD) NOTE: <ul style="list-style-type: none"> • If a peripheral blood sample (TSCR) is received in place of a CORD sample, the order should be written on the Cord Blood Log. • Cord Blood Log is reviewed to ensure that every patient that delivers at UWMC is evaluated for Rh immune globulin administration | | | | | | |

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| 6 | MLS staff reviews the Cord Blood Log daily to: <ul style="list-style-type: none"> • Verify that Rh Immune globulin was administered for qualifying mothers • Contact TSL MD on call for the following was indicated but not done: <ul style="list-style-type: none"> ○ Rh immune globulin was not administered ○ Rh immune globulin workup (RHEV) was not ordered |
|---|--|

Processing Type and Screen Extend Orders (TSCREX)

| STEP | ACTION | | | | | | |
|--|---|----|------|--|--|---|---|
| 1 | Receive specimen and verify acceptability per section Specimen Receipt and Acceptability | | | | | | |
| | Verify that patient has not been pregnant or transfused last 90 days | | | | | | |
| | <table border="1" style="width: 100%;"> <thead> <tr> <th style="text-align: left;">If</th> <th style="text-align: left;">Then</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;">Patient was NOT transfused or pregnant last 90 days</td> <td style="vertical-align: top;"> Patient is eligible for type and screen extend <ul style="list-style-type: none"> • Receive the TSCREX order in SQ according to the appropriate section above – sections Receiving Interfaced EPIC/Sunquest Test Orders or Sunquest Order Entry and Receipt • MLS enters EXTS- Sample eligible to extend for planned procedure under BBC (Blood Bank Comment) in Blood Order Processing </td> </tr> <tr> <td style="vertical-align: top;">Patient was transfused or pregnant last 90 days</td> <td style="vertical-align: top;"> Patient is not eligible for type and screen extend <ul style="list-style-type: none"> • Receive the TSCREX order in SQ according to the appropriate section above – sections Receiving Interfaced EPIC/Sunquest Test Orders or Sunquest Order Entry and Receipt • Notify caregiver that the patient is not eligible for sample extension and the specimen will expire in 3 days. If blood is needed after 3 days, a new specimen will need to be collected. Document who was notified, date and time and patient is not qualified on the requisition • MLS enters NOEXT- Sample ineligible to extend and expires three days from collection. Redraw if procedure is more than three days from collection under BBC </td> </tr> </tbody> </table> | If | Then | Patient was NOT transfused or pregnant last 90 days | Patient is eligible for type and screen extend <ul style="list-style-type: none"> • Receive the TSCREX order in SQ according to the appropriate section above – sections Receiving Interfaced EPIC/Sunquest Test Orders or Sunquest Order Entry and Receipt • MLS enters EXTS- Sample eligible to extend for planned procedure under BBC (Blood Bank Comment) in Blood Order Processing | Patient was transfused or pregnant last 90 days | Patient is not eligible for type and screen extend <ul style="list-style-type: none"> • Receive the TSCREX order in SQ according to the appropriate section above – sections Receiving Interfaced EPIC/Sunquest Test Orders or Sunquest Order Entry and Receipt • Notify caregiver that the patient is not eligible for sample extension and the specimen will expire in 3 days. If blood is needed after 3 days, a new specimen will need to be collected. Document who was notified, date and time and patient is not qualified on the requisition • MLS enters NOEXT- Sample ineligible to extend and expires three days from collection. Redraw if procedure is more than three days from collection under BBC |
| If | Then | | | | | | |
| Patient was NOT transfused or pregnant last 90 days | Patient is eligible for type and screen extend <ul style="list-style-type: none"> • Receive the TSCREX order in SQ according to the appropriate section above – sections Receiving Interfaced EPIC/Sunquest Test Orders or Sunquest Order Entry and Receipt • MLS enters EXTS- Sample eligible to extend for planned procedure under BBC (Blood Bank Comment) in Blood Order Processing | | | | | | |
| Patient was transfused or pregnant last 90 days | Patient is not eligible for type and screen extend <ul style="list-style-type: none"> • Receive the TSCREX order in SQ according to the appropriate section above – sections Receiving Interfaced EPIC/Sunquest Test Orders or Sunquest Order Entry and Receipt • Notify caregiver that the patient is not eligible for sample extension and the specimen will expire in 3 days. If blood is needed after 3 days, a new specimen will need to be collected. Document who was notified, date and time and patient is not qualified on the requisition • MLS enters NOEXT- Sample ineligible to extend and expires three days from collection. Redraw if procedure is more than three days from collection under BBC | | | | | | |
| 2 | | | | | | | |

Extending TSCREX Day of Surgery (MLS only)

| STEP | ACTION | | | | |
|---------------|---|---------------|------|---------|-----------------------|
| 1 | Receive verification from the clinical team the patient was not transfused or become pregnant since the TSCREX specimen was collected | | | | |
| 2 | Verify the TSCREX order has a comment indicating the patient qualifies for specimen extension | | | | |
| | <table border="1" style="width: 100%;"> <thead> <tr> <th style="text-align: left;">If comment is</th> <th style="text-align: left;">Then</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;">Present</td> <td style="vertical-align: top;">Continue to next step</td> </tr> </tbody> </table> | If comment is | Then | Present | Continue to next step |
| If comment is | Then | | | | |
| Present | Continue to next step | | | | |

| | |
|--|---------------------------|
| TITLE: Specimen Acceptability and Receiving Test Orders | Number: PC-0040.06 |
|--|---------------------------|

| STEP | ACTION | |
|------|--|---|
| | NOT present | Notify caregiver that the patient is not eligible for sample extension and a new T&S sample must be submitted |
| 3 | Verify the sample was collected within the last 30 days | |
| | If collected | Then |
| | < 30 days ago | Continue to next step |
| | > 30 days ago | Notify caregiver that the patient is not eligible for sample extension and a new T&S sample must be submitted |
| 4 | Verify the following criteria are met since sample collection: | |
| | <ul style="list-style-type: none"> No history of clinically significant antibodies Current antibody screen negative No history of transfusion in last 3 months (review history in Sunquest in addition to patient response to questions) No pregnancy in last 3 months | |
| | If criteria are | Then |
| | Met | Continue to next step |
| | Not met | Notify caregiver the patient is not eligible for sample extension and a new T&S sample must be collected |
| 5 | Select the TSCREX order in Sunquest BOP | |
| 6 | <ul style="list-style-type: none"> Update the sample expiration with an additional 3 days (T+3) and perform electronic crossmatch on any requested units Override the QA failure according to SOP <i>Sunquest: Responding to Quality Assurance Failures</i> | |
| 7 | Click <Save> | |

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:

FORM Quality Improvement
 FORM Cord Blood Log
 SOP Patient History Check (HXCK)

TITLE: Specimen Acceptability and Receiving Test Orders

**Number:
PC-0040.06**

SOP Canceling Orders and Correcting Results in Sunquest
SOP Blood Component Order Receipt and Processing

TRAINING

| | |
|--|---------------------------|
| TITLE: Specimen Acceptability and Receiving Test Orders | Number: PC-0040.06 |
|--|---------------------------|

| | |
|---|-------------------|
| UWMC SOP Approval: | |
| UWMC CLIA Medical Director | _____ Date _____ |
| | Mark H. Wener, MD |
| Transfusion Service Manager | _____ Date _____ |
| | Nina Sen |
| Compliance Analyst | _____ Date _____ |
| | Christine Clark |
| Transfusion Service Medical Director | _____ Date _____ |
| | Monica Pagano, MD |
| UWMC Biennial Review: | |
| | _____ Date _____ |
| | _____ Date _____ |

REVISION HISTORY:

- 4/21/17: Updating the SOP to include the following changes:
 - The year of collection is not required on specimens and will not be rejected if discrepant
 - Written date and time of collection on the requisitions is not required of the phlebotomist and the specimen will not be rejected if discrepant
- 8/14/18: Revised for implementation of interfaced inpatient product orders.
- 2/02/19: Added referral to SOP Order Processing to receive neonatal RBC orders (TNRBC)
- 3/27/2021: Updating the SOP to include the following changes:
 - Updated for implementation of EPIC for inpatient and outpatient electronic medical record. Specimens with orders in SQ will no longer require a paper requisition.
 - Revision include new specimen acceptability requirements and instructions how to look up mother's ID for cord blood evaluations.
 - Added instructions for processing test orders from the operating room, emergency room and associated with MTP as STAT even if ordered as ROUTINE by provider.
 - Changed name of SOP form Specimen Acceptability and Order Receipt to Specimen Acceptability and Receiving Test Orders

| | |
|--|---------------------------|
| TITLE: Specimen Acceptability and Receiving Test Orders | Number: PC-0040.06 |
|--|---------------------------|

APPENDICES:

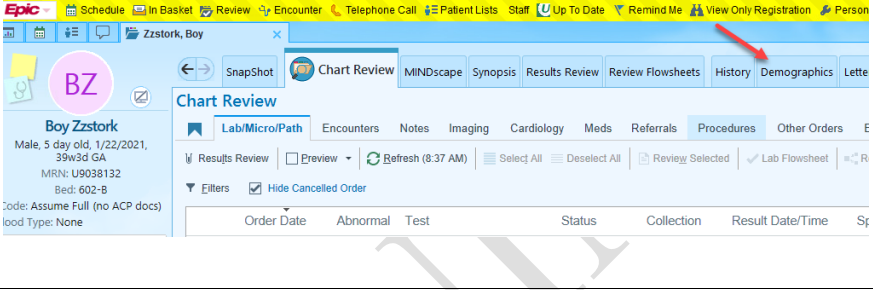
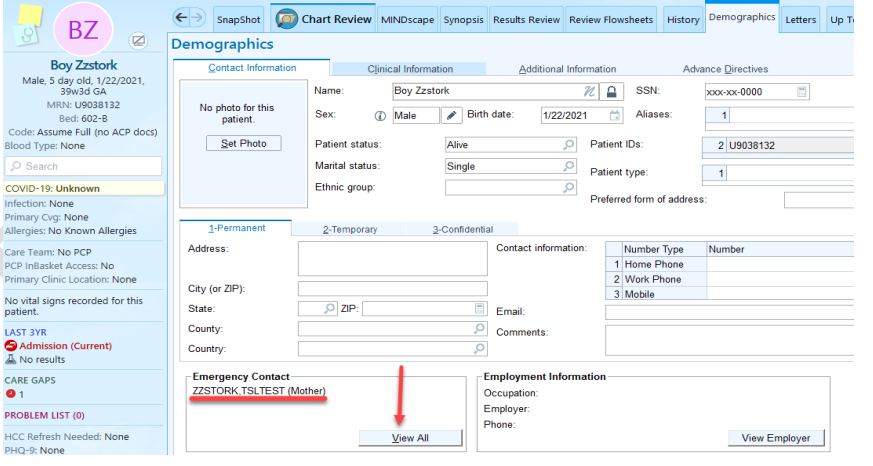
Appendix A: Sunquest Test/Battery Order Codes

| Sunquest Code | Description |
|---------------|-------------------------------|
| ABRH | Blood Type |
| ABRH2 | Blood Type confirmation |
| ABSCR | Antibody Screen |
| ABTA | Antibody Titer RBC Anti A |
| ABTB | Antibody Titer RBC Anti B |
| 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 |
| ELUT | Antibody Elution |
| ER | Emergency Release |
| PREN | Prenatal testing |
| RHEV | Rh Immune Globulin Evaluation |
| RHPHEN | Rh Phenotype |
| SAPHEN | Single Phenotype |
| TRRX | Transfusion Reaction Workup |
| TSCR | Type and Screen |
| TSCREX | Type and Screen, Extended |
| TXM | Type and Crossmatch |
| XPINK | Additional Blood Bank Sample |

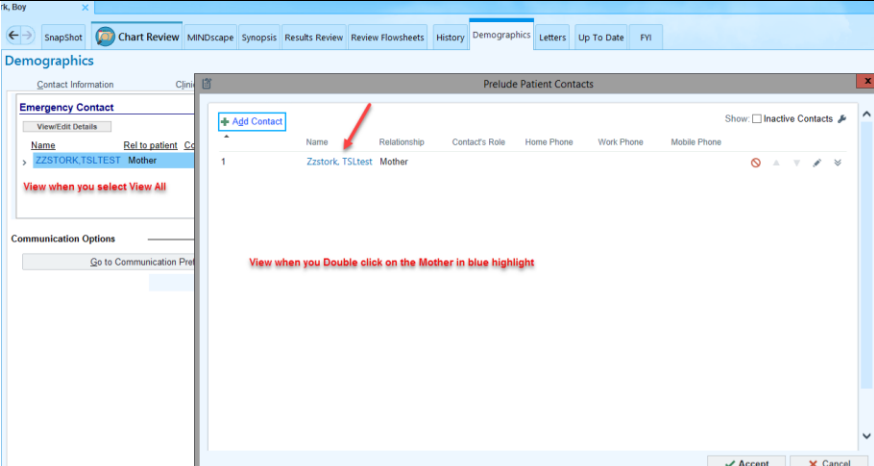
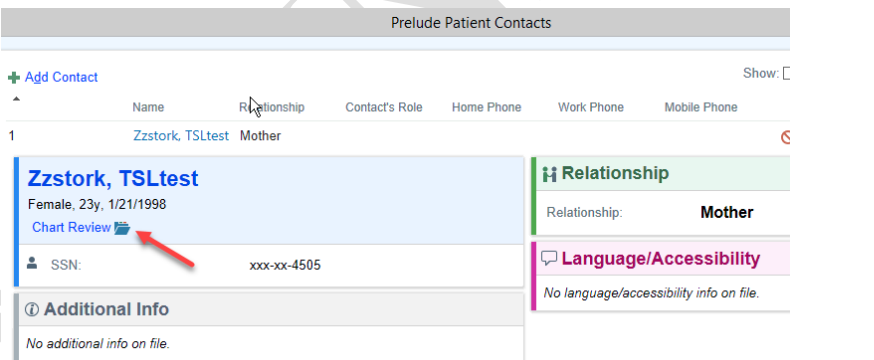
Commented [SN1]: We should move crediting tests charge to SQ: Canceling orders and correcting results SOP

| | |
|--|---------------------------|
| TITLE: Specimen Acceptability and Receiving Test Orders | Number: PC-0040.06 |
|--|---------------------------|

Appendix B: Identifying Baby's Mother in EPIC

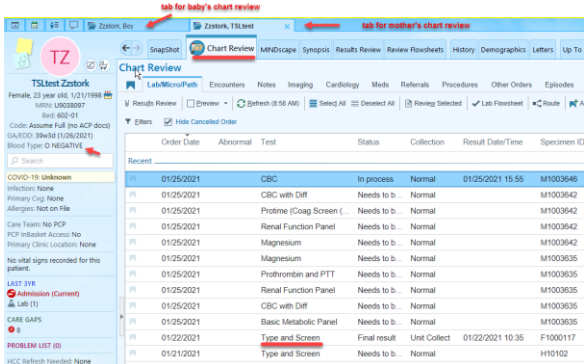
| STEP | ACTION |
|------|--|
| 1 | <ul style="list-style-type: none"> Log into EPIC Select the 'Review' tab |
| 2 | <ul style="list-style-type: none"> Enter the baby's <MRN> Click <Select> to select the correct patient |
| 3 | <p>Select the 'Demographics' tab to display the baby's demographic information</p>  |
| 4 | <p>Click the <View All> button in the Emergency Contact box where the mother's name is listed. This will open the Emergency Contact Field</p>  |
| 5 | <ul style="list-style-type: none"> Double click on the blue highlighted area with the mother's name to open a Prelude Patient Contacts dialog box Double click on the 'mother's name' |

| | |
|--|---------------------------|
| TITLE: Specimen Acceptability and Receiving Test Orders | Number: PC-0040.06 |
|--|---------------------------|

| STEP | ACTION |
|------|--|
| |  |
| 6 | <ul style="list-style-type: none"> Click on the blue <Chart Review> link under the mother's name to open a tab for the mother under chart review  <p>NOTE: Baby's chart review is still open on an earlier tab so user can float between mother and baby chart</p> |
| 7 | <p>Obtain the mother MRN and go to section Processing Cord Blood Orders (CORDBT) step 2 to perform a history check in Sunquest to determine if cordblood testing is indicated</p> <p>IMPORTANT: Mother's blood type is listed in the patient demographic section. This is historical and should NOT be used to determine if testing of the baby's cordblood is indicated or if a confirmation ABO/RH is needed for a blood order because it does not</p> |

TITLE: Specimen Acceptability and Receiving Test Orders

Number: PC-0040.06

| STEP | ACTION | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|------------|--|--------------|---------------|------------------|-------------|------------------|-------------|------------|-----|------------|--------|------------------|----------|------------|---------------|-------------|--------|--|----------|------------|------------------------|-------------|--------|--|----------|------------|----------------------|-------------|--------|--|----------|------------|-----------|-------------|--------|--|----------|------------|-----------|-------------|--------|--|----------|------------|---------------------|-------------|--------|--|----------|------------|----------------------|-------------|--------|--|----------|------------|---------------|-------------|--------|--|----------|------------|-----------------------|-------------|--------|--|----------|------------|-----------------|--------------|--------------|------------------|----------|------------|-----------------|-------------|--------|--|--------|
| | <p>designate where and when the blood type was performed. To find current ABO/RH on mother, review results in Sunquest or open the type and screen results in EPIC .</p>  <table border="1" data-bbox="430 699 885 930"> <thead> <tr> <th>Order Date</th> <th>Abnormal Test</th> <th>Status</th> <th>Collection</th> <th>Result Date/Time</th> <th>Specimen ID</th> </tr> </thead> <tbody> <tr> <td>01/25/2021</td> <td>CBC</td> <td>In process</td> <td>Normal</td> <td>01/25/2021 15:55</td> <td>M1003645</td> </tr> <tr> <td>01/25/2021</td> <td>CBC with Diff</td> <td>Needs to b.</td> <td>Normal</td> <td></td> <td>M1003642</td> </tr> <tr> <td>01/25/2021</td> <td>Protime (Coag Screen (</td> <td>Needs to b.</td> <td>Normal</td> <td></td> <td>M1003642</td> </tr> <tr> <td>01/25/2021</td> <td>Renal Function Panel</td> <td>Needs to b.</td> <td>Normal</td> <td></td> <td>M1003642</td> </tr> <tr> <td>01/25/2021</td> <td>Magnesium</td> <td>Needs to b.</td> <td>Normal</td> <td></td> <td>M1003642</td> </tr> <tr> <td>01/25/2021</td> <td>Magnesium</td> <td>Needs to b.</td> <td>Normal</td> <td></td> <td>M1003635</td> </tr> <tr> <td>01/25/2021</td> <td>Prothrombin and PTT</td> <td>Needs to b.</td> <td>Normal</td> <td></td> <td>M1003635</td> </tr> <tr> <td>01/25/2021</td> <td>Renal Function Panel</td> <td>Needs to b.</td> <td>Normal</td> <td></td> <td>M1003635</td> </tr> <tr> <td>01/25/2021</td> <td>CBC with Diff</td> <td>Needs to b.</td> <td>Normal</td> <td></td> <td>M1003635</td> </tr> <tr> <td>01/25/2021</td> <td>Basic Metabolic Panel</td> <td>Needs to b.</td> <td>Normal</td> <td></td> <td>M1003635</td> </tr> <tr> <td>01/22/2021</td> <td>Type and Screen</td> <td>Final result</td> <td>Unit Collect</td> <td>01/22/2021 10:35</td> <td>F1000117</td> </tr> <tr> <td>01/21/2021</td> <td>Type and Screen</td> <td>Needs to b.</td> <td>Normal</td> <td></td> <td>H10102</td> </tr> </tbody> </table> | Order Date | Abnormal Test | Status | Collection | Result Date/Time | Specimen ID | 01/25/2021 | CBC | In process | Normal | 01/25/2021 15:55 | M1003645 | 01/25/2021 | CBC with Diff | Needs to b. | Normal | | M1003642 | 01/25/2021 | Protime (Coag Screen (| Needs to b. | Normal | | M1003642 | 01/25/2021 | Renal Function Panel | Needs to b. | Normal | | M1003642 | 01/25/2021 | Magnesium | Needs to b. | Normal | | M1003642 | 01/25/2021 | Magnesium | Needs to b. | Normal | | M1003635 | 01/25/2021 | Prothrombin and PTT | Needs to b. | Normal | | M1003635 | 01/25/2021 | Renal Function Panel | Needs to b. | Normal | | M1003635 | 01/25/2021 | CBC with Diff | Needs to b. | Normal | | M1003635 | 01/25/2021 | Basic Metabolic Panel | Needs to b. | Normal | | M1003635 | 01/22/2021 | Type and Screen | Final result | Unit Collect | 01/22/2021 10:35 | F1000117 | 01/21/2021 | Type and Screen | Needs to b. | Normal | | H10102 |
| Order Date | Abnormal Test | Status | Collection | Result Date/Time | Specimen ID | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 01/25/2021 | CBC | In process | Normal | 01/25/2021 15:55 | M1003645 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 01/25/2021 | CBC with Diff | Needs to b. | Normal | | M1003642 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 01/25/2021 | Protime (Coag Screen (| Needs to b. | Normal | | M1003642 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 01/25/2021 | Renal Function Panel | Needs to b. | Normal | | M1003642 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 01/25/2021 | Magnesium | Needs to b. | Normal | | M1003642 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 01/25/2021 | Magnesium | Needs to b. | Normal | | M1003635 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 01/25/2021 | Prothrombin and PTT | Needs to b. | Normal | | M1003635 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 01/25/2021 | Renal Function Panel | Needs to b. | Normal | | M1003635 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 01/25/2021 | CBC with Diff | Needs to b. | Normal | | M1003635 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 01/25/2021 | Basic Metabolic Panel | Needs to b. | Normal | | M1003635 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 01/22/2021 | Type and Screen | Final result | Unit Collect | 01/22/2021 10:35 | F1000117 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 01/21/2021 | Type and Screen | Needs to b. | Normal | | H10102 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

TRAINING