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Blood Bank Pre-Surgery Testing		

Printed copies are for reference only. Please refer to the electronic copy for the latest version.

I. PURPOSE

To describe the process for submitting samples to the Blood Bank for patients who are scheduled for elective surgery.

II. SCOPE

This process applies to all patients who will have elective surgery at Methodist, University and Riley Hospitals.

III. EXCEPTIONS

All exceptions are outlined in the procedure below.

IV. DEFINITIONS

AABB: Association for the Advancement of Blood & Biotherapies

CAP: College of American Pathologists

Type & Screen: ABO and Rh, IAT (indirect antiglobulin test)

V. POLICY STATEMENTS

- A. Pre-surgery Blood Bank specimens may be collected at any IU Health facility.
- B. All specimens must be collected following Blood Bank Specimen Collection and Identification policy.
- C. All pre-surgery patient samples received in the Blood Bank will have a type and screen performed, regardless of the patient's recent transfusion and/or pregnancy status.
- D. Pre-surgery patient samples can be retained for crossmatching for a period of 30 days if the patient meets the extended specimen eligibility guidelines.
- E. Extended specimen eligibility guidelines:
 1. No blood transfusion (red blood cells or platelets) within the past 90 days.
 2. No pregnancies within the last 90 days.
 3. Surgery is scheduled in the next 30 days.
 4. Pre Surgery Questionnaire Form completed and submitted with the patient specimen.
- F. Disqualification Criteria

- i. Patients with known clinically significant allo or auto antibodies.
 - ii. Patients transfused with red blood cells or platelets within the last 90 days.
 - iii. Patients pregnant within the last 90 days.
 - iv. Surgery date is greater than 30 days from the specimen collection date.
 - v. Patients with a new positive antibody screen.
2. For patients falling into the above disqualification categories, a sample for Type and Screen should still be sent to the Blood Bank when the patient presents for Pre-Admission Testing.
 3. A new sample will be required the day of surgery.

VI. PROCEDURES

- A. Order a Type and Screen in Cerner and collect the specimen following policy Blood Bank Specimen Collection and Identification.
- B. Complete the Pre Surgery Questionnaire Form.
 1. Affix a patient chart label in top right corner of form.
 2. Document the following:
 - i. Date surgery is scheduled.
 - a. If date of surgery is not known, document "TBD".
 - ii. Hospital location for surgery. (e.g. Methodist, University, Riley)
 - iii. Full name of surgeon/ordering provider.
 - iv. Planned procedure.
 3. Ask the patient the following questions and document responses in the Patient Medical History section:
 - i. Has the patient been transfused red blood cells in the last 90 days?
 - ii. Has the patient been transfused platelets in the last 90 days?
 - iii. Has the patient been pregnant in the last 90 days?
 4. Instruct the patient to notify their physician or Pre-Admission Testing immediately if they are transfused or become pregnant before their surgery.
 5. Review the form with the patient and have the patient sign the form.
 6. The person completing the form: Print your name, document the phone number that the Blood Bank can utilize to call if there are any questions or problems, then sign and date.
- C. Submit the sample and completed form to the Blood Bank.
 1. Scan page 1 of the form and email to AHCBBloodBankPreSurgForms@iuhealth.org.
 2. Send the original form to Medical Records.
 3. Order a Type and Screen in Cerner.
 4. Place a Cerner order for required blood products with "Date to be Given" as the date of surgery.
 5. If date of surgery is not known, notify Blood Bank once the patient has a surgery date.
 6. If the blood product order is not received the day before the surgery, there may be a delay in blood day of surgery.
 7. Send Type and Screen sample to Blood Bank.

8. Note: If no form is sent to Blood Bank, sample expiration date will not be extended.
- D. Upon admission for surgery, verify with the patient that they have not been transfused or become pregnant since their pre-surgical specimen was collected.
1. If the patient has been transfused or became pregnant, notify Blood Bank immediately and order new ABO, Rh, and IAT testing.

VII. CROSS REFERENCES

Blood Bank Specimen Collection and Identification

VIII. REFERENCES/CITATIONS

AABB Standards: Current edition

CAP Inspection Checklists, Transfusion Medicine: Current Edition

IX. FORMS/APPENDICES

Pre Surgery Questionnaire Form

X. APPROVAL BODY, IF APPLICABLE

None



Pre Surgery Questionnaire Form


Patient Label

Specimen must be drawn within 30 days of surgery

Patient Information:

Date Surgery Scheduled:		Full Name of Surgeon/Ordering Practitioner:	
Hospital:		Planned Procedure:	

Patient Medical History:

Please answer all 3 of the following questions.	Yes	No
Has the patient been transfused red blood cells within the last 90 days?		
Has the patient been transfused platelets within the last 90 days?		
Has the patient been pregnant within the last 90 days?		
 Patient instructions: If you receive any blood products between today's date and date of surgery, or if you become pregnant, notify your Surgeon's office immediately.		
Patient/Guardian signature		

Further instructions:

- Scan Page 1 of this completed form and email to AHCBloodBankPreSurgForms@iuhealth.org. Send the original to Medical Records.
- Order a Type and Screen in Cerner.
- Place a Cerner order for required blood products with "Date to be Given" as the date of surgery. If date of surgery is not known, please write "TBD" for "Date Surgery Scheduled" above. Please notify Blood Bank once the patient has a procedure date. If blood product order is not received the day before the procedure, there may be a delay in getting blood day of surgery.
- See Page 2 for Additional Information about the Blood Bank Pre-Surgery process.

Person completing Form (please print): _____ Clinic Phone #: _____

Signature: _____ Date: _____

For Blood Bank use only:

Please document the following:	Yes	No
Does the patient qualify for the Pre-Surgery Process?		
If NO, what is the reason for disqualification (circle one):		
Answered YES to a question above Antibody screen is positive History of antibody Surgery >30 days from sample draw date		
Name of Provider Notified: _____	Date: _____	Time: _____
Name of Blood Bank Team member completing this section: _____		



Specimen must be drawn within 30 days of surgery**Additional Information about the Blood Bank Pre-Surgery Process:**

- If the patient does NOT qualify to have their sample expiration extended to 30 days, the Blood Bank will notify the Surgeon/Ordering Practitioner listed at the top of page 1.
- Reasons for disqualification:
 - Patient answered “Yes” to at least 1 of the 3 questions on page 1
 - Patient’s antibody screen (IAT in Cerner) in the Type and Screen sample is positive
 - Patient has a history of antibody
- Patients who do NOT qualify will need a new sample drawn within 3 days of surgery.
- Specimen must be collected via Positive Patient Identification (PPID). If PPID is not used, there may be delays in getting blood day-of-surgery.
- The Type and Screen sent can only be extended up to 30 days. If the procedure is more than 30 days from sample collection, it cannot be used for this process.
- All patients must have 2 ABO/Rh results on file with IU Health Blood Bank to receive blood products. PPID-collected samples will count as both samples. Samples collected without PPID or with PPID override will require a separate sample to be sent to Blood Bank before blood products can be released.
- A sample drawn day-of-surgery will lead to delays in preparing blood for the OR.
- This form is NOT a product order. A Cerner order for blood products will be required before Blood Bank can crossmatch and dispense products.
- Orders should be placed at least 24 hours prior to patient’s scheduled procedure to ensure there are not delays in having products ready for the start of patient’s surgery.