Bassett Healthcare Network

Electronic Specimen Collection v1.2
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Comments for version 1.2

Under **Add Orders on to a Specimen:** Removed #4

Approval and Periodic Review Signatures

Type	Description	Date	Version	Performed By	Notes
Approval	Lab Director	5/23/2022	1.1	Samantha Davenport MD Service Line Chief (M03764)	
Approval	Lab Director	4/21/2022	1.1	John Fisk MD Clinical Laboratory Director (M08480)	
Approval	Lab Director	4/18/2022	1.1	Simha Sastry MD Clinical Laboratory Director (M06625)	
Approval	Lab Director	4/13/2022	1.1	Ghazala Nathu MD Clinical Laboratory Director (S00134)	
Approval	Lab Director	4/13/2022	1.1	Timothy Chapman MD Clinical Laboratory Director (M11669)	
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Version History

Version	Status	Type	Date Added	Date Effective	Date Retired
1.2	Approved and Current	Minor revision	9/8/2023	9/8/2023	Indefinite
1.1	Retired	Initial version	2/10/2022	5/23/2022	9/8/2023

ELECTRONIC SPECIMEN COLLECTION

PURPOSE

When a patient presents, the lab is responsible to ensure that all orders that are due to be collected are electronically released, collected and performed. This procedure outlines the different ways to electronically release and collect all specimens. There are instances when multiple providers see a patient on one date. Each provider may determine that laboratory tests are medically necessary. Proper documentation for these tests will be the providers' responsibility. If the same test is ordered by two providers, care must be taken to make sure the patient is not billed twice. It also discusses what process to follow when a provider orders a miscellaneous test.

PROCEDURE

Inpatients

When collecting specimens on an inpatient, the phlebotomist will use the Rover device and mobile label printer to print specimen labels at the bedside.

View and Manage Draw Lists

When you log in for the first time, you must add the draw list you want to be available to your menu.

1. Tap **Menu** and select **Manage Lists**
2. Tap the appropriate patient list folder to open it, and then tap the draw list you need
3. Continue selecting draw lists as necessary
4. Tap **Accept**. The selected draw lists are added to your drop-down menu
5. The next time you log in, your default draw list opens automatically.
6. If you need to access another draw list, you can switch between your draw list by tapping in the top- right corner and selecting another draw list from the menu

Select Printer and List

1. At the beginning of each shift, you must make sure you **assign a printer** to your Rover device.
2. Tap **Menu** and select **Assign Printer**
3. Select the printer you want to use in the list and **Accept**
4. If you need to change printer, click on **Options at** the bottom right of the screen. Tap on **Printer** and choose the printer to which you want to print
5. Select **Plebe IP Draw List**
6. Select your facility
7. Select desired floor
8. During 0530 morning rounds, select the floor you are assigned to draw.
9. To sort the list, tap on  at the top of the screen
10. Select room/bed
11. If you are assigned pager for the shift, select All Draws MIB
12. To sort the list, tap on  at the top of the screen
13. Select Next Draw Time

Daily Vancomycin Trough Report for 0530 Rounds: (if applicable)

1. Prior to morning rounds, a report is generated listing all vancomycin trough (VANCT) orders. These patients should be drawn first.
2. Click on **My Reports**
3. Choose the **Library** tab and type **Bassett Vanco** in the **Search** field and
4. Enter
5. At **Bassett Vancomycin Trough Order for Lab Review,** click **Edit** to modify the date to the current date.
6. Print the report and review what patient's need to be drawn for the current date.
7. Stop at the nurse's desk on each floor where the nurses will list what patients need to be collected. Follow the collection process.

Print Labels and Collect a Specimen

1. Verify patient information by asking the patient their name and date of birth, compare to wristband. As long as everything matches, **Scan** the patient's wristband with your Rover device. Once you scan the patient's wristband, specimen IDs are created for the selected orders and the labels print automatically.
2. If you are unable to scan the patient's ID band, verify that the correct orders are selected in Order Inquiry, and then tap **Print Labels**. For labels to print, you must enter an override reason, "patients wristband not scanned" and tap **Accept**
3. Have the nurse place a new ID band on the patient
4. If an override was done due to the patients wrist band not being scanned, the specimens must be hand labeled from the patients wristband, time and initials must be written on the specimen(s) and a call must be placed to CLP
5. If collecting a Blood Bank specimen, no overrides can occur. The patient's wristband and the specimens Beaker label must be scanned. If Rover is unable to scan the patient's wristband or specimen labels, CLP and Help Desk (4750) must be contacted to log a ticket for repair and must revert to down time; DO NOT USE BEAKER LABEL; hand label specimen with first and last name and MRN from patient's wristband. Include date, time and initials.
6. Once collection is complete, tubes are labeled with Beaker labels **at patient's bedside.**
7. Once the labels are affixed to the tubes, **scan** the specimen label barcode into the Rover device to begin the collection process. Ensure the correct collection information is entered and then close out of the patient.
8. If you are unable to scan the specimen label, tap the check boxes for the specimens you are collecting, and then tap **Actions > Collect**
9. If an override was done, time and initials must be written on the specimen(s), a second set of initials must be on the sample indicating a second person verified that they specimens are labeled correctly, and a call must be placed to CLP.
10. Review the information that appears. Most details are already completed
11. If you need to change any information, tap **Edit**, make your changes, and tap **Accept** to save your work.
12. You can manually reprint specimen labels from the Print screen
13. In Order Inquiry, tap the orders you want to reprint labels for
14. Tap **Actions** and select **Reprint Labels**. The Print screen opens
15. Select the number of copies and ensure your printer is correct
16. Indicate whether labels should be printed per container or per specimen
17. Indicate whether the selected label should be printed for all specimens
18. Tap **Print**

Collection Process is complete. If collections are complete for that patient, he/she will drop off the list. If more draws are scheduled for later, he/she will stay on the list

Redraw a Specimen
This function is used when a specimen has already been collected but is unsuitable for testing and is still needed on inpatients only. Please refer to the "Cancellation & Specimen Recollection Follow up Policy and Procedure"
1. Using the Rover device, in Order Inquiry, tap the order for the specimen you need to redraw
2. Tap **Redraw**
3. Select a reason
4. Tap **Accept**

Defer a Draw
This function is used if the phlebotomist is unable to collect a specimen at the requested time. Deferring the draw un-assigns the patient and applies a flag that other phlebotomists can see.
1. Using the Rover device, in Order Inquiry, tap the orders you want to defer
2. Tap **Actions** and select **Defer Draw**
3. On the menu that appears, tap the reason for deferring the draw or select
4. **Other** and free text the reason
5. Notify the nurse taking care of the patient that someone else will return to collect the specimen

Patient Refusal
If someone hesitates to let you collect a blood specimen(s), explain to them that their blood test results are important to their care. However, patients have a right to refuse blood tests. If the patient still refuses, it must be reported to the nurse or physician and cancelled.
1. Using the Rover device, in Order Inquiry, select the orders and then tap **Print Labels**
2. Orders must be cancelled using reason "Patient Refused"
3. The nurse or physician the refusal was reported to must be noted in the comment section of the cancellation
4. It is up to the ordering physician to place new orders

Add Orders on to a Specimen
1. Using the Rover device, in Order Inquiry, tap the order you are adding to a specimen
2. Tap **Add on**
3. Tap a specimen to add the order to it

For STAT patients (ordered as Unit collect but are collected by the Lab)
1. Nurse will NOT print label, will only page the phlebotomist
2. Follow collection process.

OUTPATIENTS
Orders are placed directly into the EMR. The Order Inquiry Activity screen will reflect how the lab test orders were placed by the providers. Patients presenting with orders from multiple providers will have all labs collected unless the provider(s) entered an Expected/Approximate date. A laboratory appointment needs to be created for all outpatients presenting for blood work and for receiving drop off specimen(s) into the laboratory.

Book it Workflow
1. Go to APPT and locate patient
2. Click on **Book It** in the activity toolbar
3. Verify Department is correct
4. Add Visit type: Lab Drop off, Lab Walk in or Laboratory visit (this is used when prescheduling a visit)
5. Select appropriate date and time.
6. Click on **Schedule** at the bottom right of the screen
   On the Appointment Review Screen verify that all information is correct and click Schedule
7. In the Appointment Deck, select lab appointment

8. Click C**heck in** on the bottom of screen.
9. Go to patient station find patient click on Arrived visit to access Order Inquiry.

Expected Dates
1. If no expected date, than the lab should complete the orders when the patient presents to the lab.
2. If approximate expected date (~) than the lab should complete the orders 30 days before/after specified date.
3. If expected date than the lab should not complete the orders before specified date unless the ordering provider is contacted but should collect any time after specified date.

Print Labels and Collect Specimen(s)
1. Click on **Patient Station** and enter the patient's MRN
2. Double click on arrive laboratory visit
3. Access the orders for each provider in the EMR, highlight and click Collect
4. If there are duplicate orders from multiple providers, highlight all testing that is not the same (i.e. CMP &BMP) and click Collect, for any testing that is the same (i.e CMP & CMP) they will need to have the sticker printed seprately. Only one set of samples will be collected any extra stickers will be placed in the specimen bag and sent with the samples. Be sure to complete a credit request form for any duplicate testing.
5. If there are orders that the patient needs to collect themselves, **do not release or print labels** until the patient returns with the specimen
6. Review selected tests to ensure you have all tests needed
7. Select **Print Label**. The LIS will generate the specimen labels
8. Samples must be collected following established protocol and labeled with the LIS label in **the presence of the patient**
9. Once all specimens are collected and labeled, **Scan** each barcodes to fill in the collection information while in the collection activity.
10. Review for correct phlebotomist, date/time collected
11. The LIS will pull the collecting department from the location of the visit that is used to release lab orders to ensure that the "Collection Dept." is your current location; e.g., MIB LABORATORY 200702

If collecting a Blood Bank specimen for an outpatient transfusion within 3 days or elective surgery within 28 days must have one of the following on the day of the scheduled procedure, Patient Identification Card or Outpatient Wristband, see Network Patient ID Card and Outpatient Wristband Policy

Once all collection information is in the LIS, exit out of the patient's chart

Reordering a Lab Miscellaneous Test
When a provider orders a Lab Miscellaneous test, the provider has entered the test in an answer field. This must be reordered at the Outpatient lab desk before the phlebotomist draws the patient's blood. Research may be needed to determine where the test will be performed. Once you have determined where the test will be performed, the order information must be entered into the LIS
1. Specimen requirements: tube type and volume
2. Temperature requirements for transportation: ambient, refrigerated or frozen
3. LIS codes for tests performed at **Mayo** Medical Laboratories (MML):
   a. Ambient shipping, LAB2113, RCMISCT
   b. Refrigerated shipping, LAB2111, RCMISCR
   c. Frozen shipping, LAB2112, RCMISCF
4. LIS codes for tests performed at **ARUP**
   a. Ambient shipping, LAB5102
   b. Refrigerated shipping, LAB5100
   c. Frozen shipping, LAB5101

   d. ARUP MISC, LAB4957
5. LIS codes for tests at a **non-Mayo** Laboratory **with results** expected: when this is ordered the lab staff will need to answer the questions, what testing is being ordered and if it is being sent due to insurance.
   a. Ambient shipping, LAB221120, RMISCT
   b. Refrigerated shipping, LAB22111, RMISCR
   c. Frozen shipping, LAB221130, RMISCF
6. LIS codes for tests at a **non-Mayo** Laboratory **with no results** expected
   a. All temperatures, LAB2236, RSOT
7. Ensure you answer the order questions associated with the new miscellaneous order by clicking the Questions tab
   a. Reference Lab: Name of Reference Lab
   b. Order Code: Test # or alpha code
   c. Test Description: Name of test

Multiple Providers with Duplicate Tests
1. If duplicate tests are ordered, only one vial will be collected.
2. Label the vial with the LIS specimen label that contains the largest amount of tests.
3. The label for the second LIS specimen number will be **highlighted.**
4. Place the specimen(s) and all the label(s) in a specimen bag.
5. The CLP receiver will notice that there is a tube with an accession number and an extra set of labels with a different specimen number (**this label will be highlighted).**
6. All labels will be scanned into receiving. Deliver the specimens along with the label(s) for the duplicate specimens to the sections for testing still in the specimen bag.
7. The person delivering the specimens should **alert the technologist** that the specimen is to be resulted on duplicate specimen numbers.
8. The desk person or the phlebotomist will document the information concerning the patient to be credited for the duplicate testing.
   a. MRN
   b. Patient name
   c. Specimen numbers
   d. Tests ordered as duplicate

The credit request will be forwarded to the Laboratory Billing Coordinators who will credit the appropriate test(s).

Automatically Faxing Results – "CCResults"
Results can automatically be faxed to providers when requested. The provider's information must be verified with the information already in the **Phone Book** in the EMR. If the provider is not in the Phone book, a Provider Dictionary Update form must be filled out and forwarded to Physician Billing.
1. Go to Order Inquiry
2. Highlight the orders that need to be faxed
3. Select **CC Results**
4. To add in a free text fax number, in the CC Recipient field, click * and then Enter
5. Fill in the **Full Name and/or location and Fax number,** double check that it was entered correctly before continuing Under the Orders for, you can uncheck orders, where you don't want to send a particular test to this provider
6. Click **Accept**
7. If the provider is not in the phone book, see *Test Requisition and Order Entry* procedure.

Patient Refusal

If someone hesitates to let you collect a blood specimen(s), explain to them that their blood tests results are important to their care. However, patients have a right to refuse blood tests. If the patient still refuses, it must be reported to the nurse or physician and cancelled.

1. In hyperspace, in Order Inquiry, select the orders and then select **Cancel**.
2. Orders must be cancelled using reason "Patient Refused"
3. The nurse or physician the refusal was reported to must be noted in the comments section of the cancellation
4. It is up to the ordering physician to place new orders.