



# Capital Health

## INTERDISCIPLINARY CLINICAL MANUAL

### Policy and Procedure

<b>TITLE:</b> Laboratory Requisition, Specimen Labeling, Supplementary Requests for Diagnostic Testing	<b>NUMBER:</b> CC 85-015
Effective Date: July 2014	Page 1 of 5
Applies To: Holders of Interdisciplinary Clinical Manual	

#### POLICY

1. Clinical laboratory testing must be requested by those with the knowledge, skills and authority to select the appropriate test(s) and to interpret the laboratory results. See Capital Health's policy CC 85-018 *Clinical Laboratory Diagnostic Test Ordering*
2. Laboratory requisitions, electronic orders and specimens submitted to the Department of Pathology and Laboratory Medicine (Laboratory) for diagnostic testing must be complete and adhere to the *Laboratory Specimen Acceptance and Rejection for Diagnostic Testing (CC 85-016 policy)*.
3. The Laboratory collaborates with its stakeholders to develop and revise requisitions (electronic or paper), whenever appropriate.
4. Initial requests for testing must be on a Capital Health approved laboratory requisition or by an electronic order.
5. Specimens that accompany the initial request must:
  - 5.1. be suitable for processing,
  - 5.2. be labeled at the time of collection in front of the patient with accurate and sufficient identifying information,
  - 5.3. match the information on the requisition or electronic order.
6. In the case of a specimen for Blood Transfusion, both the phlebotomist and the witness must sign their **full signatures** on the Blood Transfusion requisition and initial the specimen label in **the presence of the patient**.
7. Only supplementary test requests can be submitted verbally and are accepted if a suitable specimen has been collected.

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8. Tests requests on laboratory requisitions expire one year from date of issue.
9. The Laboratory will record the date and time of specimen receipt.

## DEFINITIONS

<b>Account Number:</b>	Capital Health Financial Number assigned by the Hospital Information System.
<b>Ancillary request:</b>	A test request submitted by an authorized requestor within the Laboratory to add test orders to a previously accepted specimen; e.g., pathologist requests additional stains on tissues to complete the diagnosis.
<b>Approved laboratory requisition</b>	A Capital Health requisition or test request form in an acceptable format that has been reviewed and approved by the Laboratory. Request forms that are not in an approved format will not be accepted e.g., prescription pads, e-mails.
<b>Authorized Prescriber</b>	<ol style="list-style-type: none"><li>1. Qualified physicians and dentists registered to practice medicine or dentistry in their respective province or country.</li><li>2. Nurse practitioner registered in the province of Nova Scotia and who has a collaborative practice agreement within Capital Health</li></ol> <p><b>Note</b> - Clinical Clerks are <b>not</b> authorized prescribers. An ordering authorized prescriber is the authorized prescriber who has ordered a diagnostic test, and who is responsible for initiating follow-up of abnormal results.</p>
<b>Authorized Requestors:</b>	In addition to an authorized prescriber, anyone who has been delegated the authority to order a test through medical (care) directives, delegated medical functions, expanded role designation, specific policies, etc. {e.g., Emergency Department medical directives, Expanded Role nurses (ordering Pap tests), Physiotherapists (ordering x-rays) etc}
<b>Authorized Requester's Information:</b>	Full name and second identifier that is unique (e.g., Provincial Physician's Registration number) or full mailing address.
<b>Client's Information:</b>	Requesting client name (e.g., hospital name) and mailing address.
<b>Initial request submitted by an authorized requestor:</b>	<ul style="list-style-type: none"><li>• <b>Using a requisition:</b> A request for testing sent to the laboratory on a requisition. The requisition accompanies the collected specimen or may be sent to the laboratory prior to initiating a request for venipuncture collection by laboratory employee.</li></ul>

- **Using an electronic order:** The test request is entered in or transferred to Laboratory Information System (LIS) and specimen label(s) containing the LIS accession number is printed.

<b>Standing Order:</b>	Authorized requestor issues a requisition to be used multiple times by the patient; e.g., monthly request for the same test(s).
<b>Supplementary request:</b>	A test request submitted by an external authorized requestor to add test orders to a previously accepted specimen; e.g., nursing unit verbally requests a test order.
<b>Test Order:</b>	The result of a test request being entered into the LIS that generates a test order.

## GUIDING PRINCIPLES AND VALUES

1. With increasing pressure to cut costs, coupled with increased testing demand, it is critical that testing guidelines, standards of practice and consultation with users of the service inform appropriate utilization. See Capital Health's Laboratory webpage: [Laboratory Utilization](#)
2. Complete and legible test request information prevents delays in testing and allows for correct and timely distribution of laboratory results.
3. Confirming the patient's identity is the **most crucial step** in collection of laboratory specimens. Many patients have similar names and the same date of birth. Unique identification is required to ensure results are reported on the correct patient.
4. Labeling specimens at the point of collection and in front of patient will reduce errors ensuring safe patient care.
5. All specimen aliquots, portions and slides shall be traceable to the patient through the information provided on the original requisition and specimen label.
6. Quality and patient safety is the ultimate goal.

## PROCEDURE

### 1. Requesting Laboratory Tests

- 1.1. Prior to requesting laboratory tests see Capital Health's Laboratory webpage: [what do I need to know before requesting a test?](#) and [Laboratory Utilization](#) to ensure appropriateness of the request.
- 1.2. Submit the initial request on a Laboratory requisition or by an electronic order.

**Note:** Supplementary requests can be submitted verbally.

### 2. Completing the Requisition

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2.1. The authorized requestor completes the requisition ensuring the information entered is complete and legible, and in the appropriate format. (See Capital Health's Laboratory webpage: [Required information for completing laboratory requisitions](#))

2.1.1. To obtain a Capital Health Requisition see Capital Health's Laboratory webpage: [How to Obtain Laboratory Requisitions](#)

2.1.2. For information on requesting tests and completing requisitions, see Capital Health's Laboratory webpage: [Specimen & Collection Requirements](#)

2.1.3. When a standing order is required ensure it is indicated on the requisition. Provide the following information:

- test name
- frequency and duration, within one year of requisition issue date
- date requested

### 3. Verifying the Patient's Identity

3.1. Verify the patient's identity at the time of specimen collection. Refer to: CH 30-040 *Patient Identification and Same Name Alert* and Capital Health's Laboratory webpage: [Verifying Patient Identity](#)

### 4. Supplementary Requests

**Note:** When supplementary test requests are received, testing will be performed if the specimen meets appropriate criteria.

4.1. Submit supplementary test requests either verbally or by electronic order.

4.2. At a minimum, include the following information when submitting a supplementary request:

- Patient identification – patient's full name and a second identifier that is unique e.g., Medical Record number, Health Card Number
- Test requested
- Authorized requester's information
- Date and time of request

### 5. Ancillary Requests

**Note:** Ancillary requests are internal to the Laboratory Department

5.1. Follow Divisional policies and procedures.

### 6. Specimen Labeling

6.1. Verify that the patient's information on the specimen's label(s) matches the patient's identity and the information on the requisition or electronic order.

6.2. Label the specimen appropriately as per the CC 85-016 Laboratory Specimen Acceptance and Rejection for Diagnostic Testing policy

- 6.3. Ensure the label is complete and legible. See: [Required formats/additional information for Specimen Labeling](#).
- 6.4. Clearly identify specimens and slides with a legible patient's full name and a minimum of one other unique identifier as described above. See Capital Health's Laboratory webpage: [Labeling requirements](#)
- 6.5. Label glass slides in pencil on the frosted end.
- 6.6. The collector labels the specimens in front of the patient immediately following specimen collection.
  - 6.6.1. In rare circumstances the labeling may be delegated e.g., a specimen obtained during surgery.
- 6.7. Place labels so that there is no interference with opening and closing of container and to allow the contents of the container to be viewed.
  - 6.7.1. Do not cover existing patient identifiers.
  - 6.7.2. Ensure there is a label on the specimen container itself and not just the top.
- 6.8. When placing the Laboratory Information System (LIS) labels, apply the bar code to the specimen container according to the requirements of the laboratory.

## RELATED DOCUMENTS

### Policies

- CH 07-041 Unidentified Patient
- CH 30-040 Patient Identification and Same Name Alert
- CC 85-079 Venipuncture
- CC 85-017 Diagnostic Tests – Requesting, Reporting of Results and Follow-up
- CC 85-018 Clinical Laboratory Diagnostic Test Ordering
- CC 85-016 Laboratory Specimen Acceptance and Rejection for Diagnostic Testing

### Other

Capital Health's Laboratory Specimen & Collection Requirements webpages:

- [Specimen & Collection Requirements](#)
- [Requesting Tests](#)
- [Collection](#)
- [Rejection Criteria](#)
- [Laboratory Utilization](#)

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