


Name of Policy: Reconciling Orders with Specimens Policy Number: 3364-107-120 Approving Officer: Medical Director, Clinical Pathology Responsible Agent: Director, Clinical Pathology Administrative Director, Lab Scope: Pathology Laboratory University of Toledo Medical Center		 Effective date: 01/04/2025 Original effective date: 03/01/2011	
Key words: Customer service, excellence, patient safety, outstanding lists, test add-ons			
<input type="checkbox"/>	New policy proposal	<input type="checkbox"/>	Minor/technical revision of existing policy
<input type="checkbox"/>	Major revision of existing policy	<input checked="" type="checkbox"/>	Reaffirmation of existing policy

(A) Policy statement

To achieve excellence in customer service and patient safety, each order for blood and other specimen type testing must be reconciled with a specimen when they are received or entered into a final status.

(B) Purpose of policy

Each order must be reconciled by collection verification and test completion or, if appropriate, cancellation with an explanatory comment. All technologists in every department must track and follow each order on their respective Outstanding/Expected Lists until the order is placed into a final state to enable timely service recovery.

(C) Procedure

Each department has a general Outstanding/Expected Lists set up to track specimen collection, transport and completion. Outstanding/Expected Lists must be running and must be checked several times throughout the shift by all technologists. With proper investigation and vigilance, “Missed” orders appearing in the Outstanding/Expected Lists section may be caught and completed. It is important that every technologist on each shift be responsible for investigating and reconciling all orders appearing in each section of their department(s) monitor, as well as orders for tests performed in their department appearing on the Outstanding/Expected Lists.

Check for:

- Tests added on after being received such as culture added to urinalysis, Chem, Heme or Micro tests added on fluids, additional Chemistries ordered on Chem-8, etc.

- Tests not received on specimens already received such as PTT not received on a PT specimen, BNP not received on a CBC specimen, Urine Tox screen not received on a UA, Stool Guaiac not received on a C. diff.

After investigation, orders outstanding for more than 48 hours or orders for a patient that has been discharged (such ER patient) must be cancelled with an appropriate comment.

<p>Approved by:</p> <p>/s/</p> <hr/> <p>Name: Amira Gohara, M.D. Title: Medical Director, Clinical Pathology</p> <p>1/10/2025</p> <hr/> <p>Date</p> <p><i>Review/Revision Completed by:</i></p> <p><i>Joshua Otiso, Administrative Director, Lab</i></p>	<p>Policies Superseded by This Policy:</p> <ul style="list-style-type: none">• <i>P-10</i> <p>Initial effective date: 03/01/2011</p> <p>Review/Revision Date: 01/04/2025</p> <p>Next review date: 01/04/2027</p>
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