

ORDERING OF LABORATORY INVESTIGATIONS BY REGISTERED NURSES AND ALLIED HEALTH PROFESSIONALS

Ordering of laboratory investigations by registered nurses and allied health professionals

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1. Introduction

Sharing staff resources more effectively through a redesign of roles reduces patient waiting times and enables more patients to flow through the system. This in turn contributes to keeping things moving through the system and reduces delay in the whole patient journey (NHS Scotland, 2011)

It was recognised that delays in the patient's journey through NHS Lothian could be reduced if Registered Nurses or Allied Health Professionals (Healthcare Professionals) were able to order baseline laboratory investigations.

This policy was reviewed by the Head of Equality & Diversity to examine the likelihood of impacts on equality. None were identified so an impact assessment is not required.

2. Aim of the policy

This policy document identifies the list of clinical conditions and related baseline investigations for which designated registered nursing and allied health professionals (healthcare professionals) are approved to order. For the purpose of this document laboratory investigations are defined as:

- Biochemistry blood and urine investigations
- Haematological blood investigations
- Microbiological blood, urine and sputum investigations

The document also outlines the responsibility of the healthcare professional in relation to ordering baseline investigations

3. Policy scope

This policy relates to all registered nurses, allied health professionals and other healthcare professionals who will be ordering laboratory Investigations within NHS Lothian.

4. Responsibility of the Healthcare Professional and Medical Staff when ordering laboratory investigations

The consultant in charge of the patient is ultimately responsible for the patient's care. Interpretation of results and clinical management plan is the responsibility of the consultant in charge of the case or designated medical practitioner, or appropriately trained:

- Advanced practitioner or
- Clinical nurse practitioner or
- Nurse specialist.

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The healthcare professional that is approved to order laboratory investigations for selected clinical conditions is responsible for ensuring that he or she is competent to undertake the duties required. The approved person is also responsible for ensuring that he/she has a clear understanding of the ethical and legal issues surrounding obtaining and ordering laboratory investigations and that the procedure is carried out within the terms of this policy and according to his or her code of professional practice and conduct.

5. Hazard Labelling of Specimens

All specimens pose a risk of infection. Managers must ensure that safe systems are in operation, which prevent HCW contamination during specimen procedures. However, compliance with Advisory Committee for Dangerous Pathogens (ACDP) guideline necessitates additional labelling to denote a high risk of infection.

Specimens should be labelled "Danger of Infection" if the patient has, or is suspected of having, Group 3 & 4 pathogens. The full list of microbiological agents and their classification is available on <http://www.hse.gov.uk/pubns/misc208.pdf>

Contact the Infection Control Doctor (ICD) or consultant microbiologist before obtaining a specimen from a patient with a suspected Group 4 pathogen or SARS

Danger of Infection labelling is necessary not just if the specimen contains a transmissible agent, but also for those specimens suspected of containing one. (Refer to Transmission Based Precautions Policy section in the [infection control manual](#))

6. Inclusion Criteria

- **All patients who present to hospital will have an admission set of baseline bloods these are outlined in Appendix 3. Except if Viral Haemorrhagic Fever is a possibility in which case, the investigations must be discussed with a consultant ID physician and senior laboratory staff before collection.**
- **Any patient presenting with the following actual or suspected clinical condition will have baseline blood and additional laboratory investigations as outlined in Appendix 4.**
 - Confusion
 - Stroke/TIA
 - Renal Colic
 - Seizures

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- Pleuritic Chest Pain
- Chest Pain
- Asthma
- GI Bleed
- Collapse
- Sepsis
- Cellulitis
- DVT
- Abdominal Pain
- Pancreatitis

7. Exclusion Criteria

All persons who have a feverish illness, rash or sore throat within 3 weeks of having visited West or Central Africa should be considered to be at risk of Viral Haemorrhagic Fever. Once patients in this category have been identified they should immediately referred to Regional Infectious Diseases Unit. **The investigations must be discussed with a consultant ID physician and senior laboratory staff before collection.**

8. Healthcare Professional Requirements

- Evidence of continued post registration experience/education related to laboratory investigations.
- Registered Nurse or Allied Health Professional nominated by Line Manager to order baseline laboratory investigations.
- Health care professional assessed as competent in venepuncture.

9. Required Education and Training

- The healthcare professional will undertake an approved NHS Lothian training programme on the process of ordering baseline laboratory investigations.
- The healthcare professional should use TRAK labels on samples wherever possible.
- The healthcare professional will undergo a period of supervised clinical practice with a suitable supervisor on ordering of baseline laboratory investigations
- The healthcare professional will be responsible for undertaking a yearly review and ensuring that they are using up to date clinical practice

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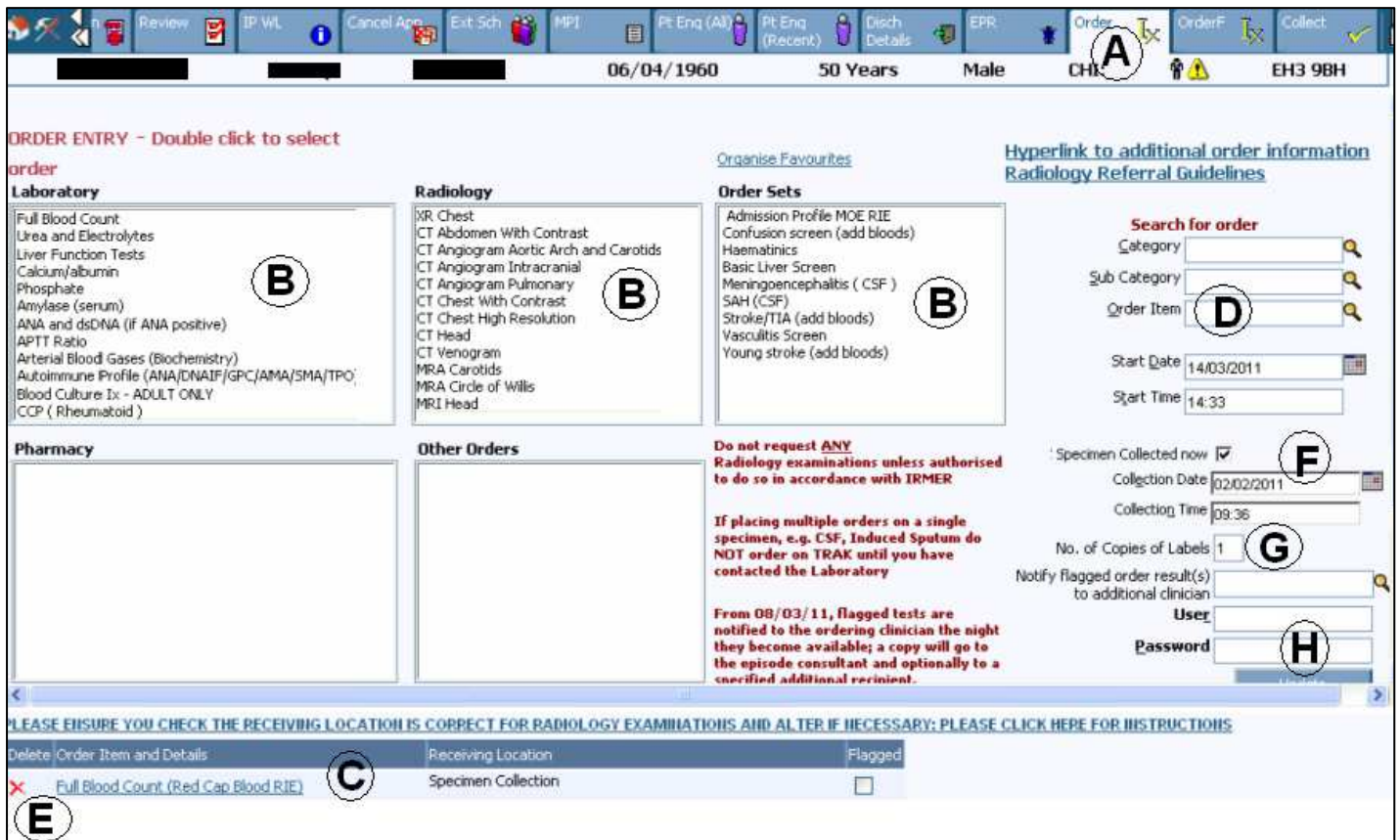
10. References:

Improving NHS Scotland: redesigning nurse roles to improve patient flows available at http://www.improvingnhsscotland.scot.nhs.uk/case-studies/Pages/Redesigning_nursing_roles_to_improve_patient_flow.aspx . Last accessed: 17/03/2011

NHS Lothian Infection Control Manual: Specimen Policy available at <http://intranet.lothian.scot.nhs.uk/NHSLothian/Healthcare/A-Z/InfectionControl/icm/Pages/cp006.aspx> . Last accessed: 18/5/2011

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Appendix 1 Ordering Bloods on TRAK



1.0 Order Specimens

1. Click the patient from the floor plan or the holding area and click the order tab from top of screen. (See Letter A above)
2. Double click on the test to be carried out in any of the order entry boxes. (See B above)
3. The selected orders will either appear in the order items and details box (C above) or you may need to confirm a pop up box by clicking on update. Make sure you read the message as this usually contains instructions relating to the test.
4. If you can't find the test you require, type the test name (or first three letters) within the 'Order Items' box (D) and click the search icon next to this box. Click on the correct test to select.
5. To delete an order click on the red cross in the delete column (E).
6. Tick the 'specimen collected now' box (F) if you are collecting the specimen now. Your label(s) will only print when this box has been ticked, otherwise the order and label will be stored on Trak waiting for you to collect. (See 2.0 Collect an Order, page 8)
7. Change the number of labels needed (G) only if you are requesting one test e.g. Blood culture investigation as this test requires a label for each bottle.

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8. Enter password and click **Update (H)**.
9. On the questionnaire page that appears, fill in all the necessary fields as you would normally on a paper order and click update to complete the order. Your label will now print

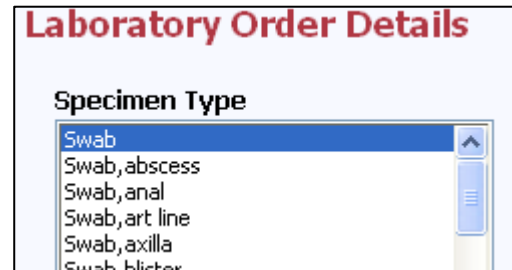
NOTE: The field marked with bold text is a mandatory field

1.1 Adding Sample Sites

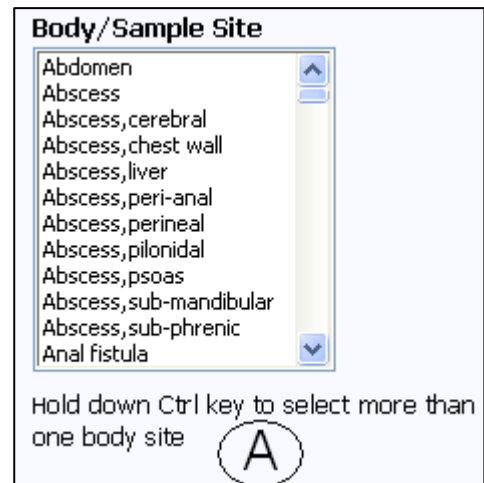
1. Click the patient from the floor plan or the holding area and click the **Order** tab from top of screen.
2. Double click on the required test to be carried out in the Laboratory order entry box.
3. Click update through any order entry message(s) noting what they are telling you.



4. You will now be presented with the Laboratory order details screen (see right) In **Specimen Site** column select the appropriate specimen type. **NOTE:** you can only select one Specimen Type

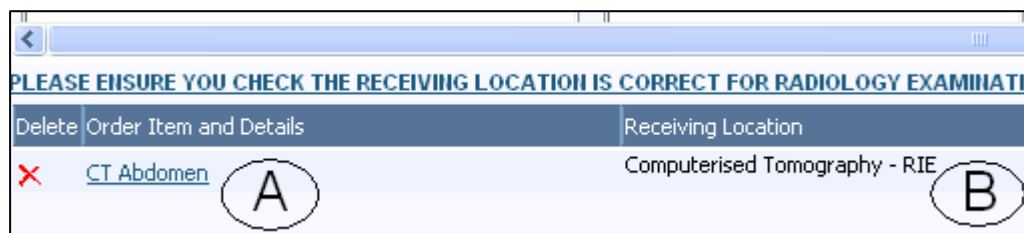


5. On the right hand side is the Body/sample site. Click once on the sample site. When selecting more than one site hold down the Ctrl and by using your mouse click on other sites. The instruction are marked on the TRAK Ordering screen (see letter A picture left)



1.2 Ordering and changing a radiology test

NOTE: You should not order any Radiology tests unless you are IRMER trained



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1. Double clicking on the required test from the Radiology order box. The test will now appear in the order box (see letter A above)
2. To change the order details select the test in the orders box (See letter A above) The orders details box will now appear

Order Item CT Abdomen

Processing Notes

Priority Routine C

Status Inactive

Receiving Location Computerised Tomography - R D

Start Date 17/03/2011 E

Start Time 09:35 E

Requested By F

Order Location WGH Lower Ground Floor (OP) G

Urgent Report Required H

Mobile Required I

Preferred Radiologist J

[Change Item](#)

3. To change the priority delete the 'Routine' and select the desired priority (See letter C)
 - Urgent investigations – Select Urgent and contact the relevant radiology department
 - Urg-tracking - for cancer tracking and the patient is seen within 2 weeks
 - 72 hour tracking is patient has cancer must be seen within 72 hours
4. Receiving location is used to request where the tests are to be carried out. Simply delete the current location and use the search icon to select the required locating. (See letter D) You will now notice the 'Receiving location' will now be updated on the main screen (See letter B page5)
5. For future orders change the 'Start date' and 'Start time' You do not need to change the 'Start Date' & 'Start Time' on the main ordering screen (See letter E)

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6. Requested By field should populate with your name if you are legally entitled to request radiology examinations. If not, and you are a doctor or a non medical referrer who has received the appropriate IRMER training contact 85050 as this tells the radiographer that you have the required training to order the test (See letter F)
7. Order Location is where the paper report is will be sent back to. (See letter G)
8. Urgent Report Required means the report will be prioritised by the radiographer (See letter H)
9. Mobile Required, if a visit to the Patient required. (See letter I)
10. Preferred Radiologist is used to allocate the required test to a Doctor/specialist. This means if a radiographer has any questions regarding the care of the patient they will know who to contact in their department. (See letter J)
11. Click update to confirm
12. Please ensure that for requesting OP examinations the OPD menu or the Schedule menu is used, and for IP examinations the floor plan is used as this mean that the examination will be directed to the appropriate radiology receiving location and the report should be sent back to the appropriate order location.

NOTE: DO NOT WRITE ANY DETAILS IN THE PROCESSING NOTES BOX

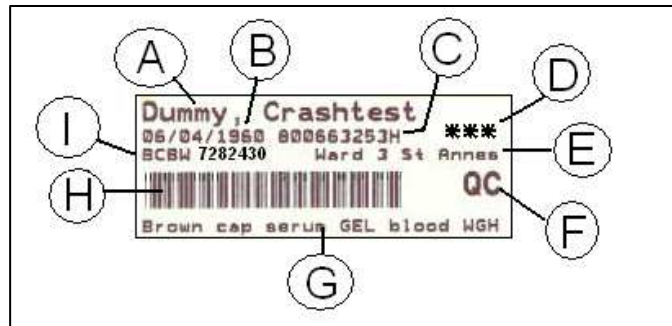
1.3 Future Orders

1. To prepare an order for collection at a future time, follow steps 1 to 5 above (page 4, Order Specimens).
2. Enter Start Date and Start Time you wish the test to be collected (See the letter A right)
3. **Do not tick** the Specimens Collected Now box collected (See the letter B right)
4. The questionnaire screen will display. Fill in all the necessary fields as you would normally on a paper order and click **Update** to complete the order. **NOTE:** No label will be printed at this time

The screenshot shows a portion of a laboratory order form. It includes the following fields and annotations:

- Start Date:** 16/03/2011 (with a calendar icon)
- Start Time:** 15:05 (with a circled 'A' next to it)
- Collected now:** (with a circled 'B' next to it)
- Collection Date:** (with a calendar icon)
- Collection Time:** (with a calendar icon)
- copies of Labels:** 1
- order result(s):** (with a magnifying glass icon)
- ditional clinician:** (with a magnifying glass icon)

1.4 Specimen label



- A. Patients Name
- B. Patients Date of Birth
- C. Patients UHPI Number
- D. Three stars indicates a high risk and will only appear if the question 'Is the specimen HIGH RISK?' is answered on the clinical question section when ordering
- E. Location of patient
- F. Lab Identification code
- G. Specimen type
- H. Barcode
- I. Visit number. This number identifies your label with the order on TRAK (see picture right)

Select	Visit No.	Order Name	Specimen
<input type="checkbox"/>	7282430	Liver Function Tests	Brown cap GEL blood
<input type="checkbox"/>	7282463	XR Orthopantomogram	
<input type="checkbox"/>	7282444	MRSA Screen	Swab, wor

1.5 Specimen bag

- Do not remove the paper sleeve
- Write urgent on the sleeve when the job is classed as 'URGENT'
- When the specimen is 'HIGH RISK' put the 'high risk sticker' on the bag

2.0 Collect an Order

1. Click on 'collect' tab on the top of the screen.
2. Check the 'End Collection Date' is the date you want to collect up to e.g.: today or tomorrow.
3. Check the order start date; does it need to be collected today?
4. Check the order start time; does it need to be collected now?
5. Click on the collected 'sheet' icon for the patient you want collect the specimen for.

6. Un-tick any box for the specimen you **don't** want to take.
7. Click update to complete the order and your label(s) will now print.

2.1 Checking for an outstanding order

1. To check whether an order has or has not been collected select the patient from the ward floor plan
2. Select the EPR icon

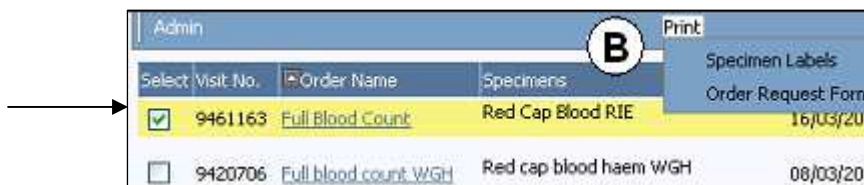
Radiology Status	Specimen Collection Date	Specimen Collectio
Ord		
Ord	16/03/2011	14:49

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3. Click the 'Orders Details Tab'
4. Identify your order and use the scroll right till you see the 'Specimen Collection Date field.'
5. If the field is empty then the specimen has not been collected on Trak (see example above)

3.0 Print Additional Labels

1. Select the patient from the floor plan and select **EPR** tab at top of screen.
2. Select **Order details** by clicking on the down arrow at the left side of the EPR screen and clicking on Order details tab.

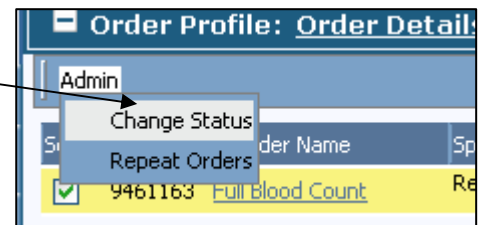


3. From the '**Select**' column tick the boxes (by clicking in them) for each specimen that requires an additional label.
4. On the mid-blue banner, hover the mouse over **Print** and from the dropdown list select **Specimen Labels**. (See letter B above)

4.0 Discontinue an Order

NOTE: You should only discontinue an order if it has not been sent to the labs

1. Select patient and select the EPR Tab.
2. Select **Order Details** by clicking on the down arrow at the left side of the EPR screen and clicking on Order details tab.
3. Tick the box for the order you wish discontinue.
4. On the mid blue banner, hover the mouse over **Admin**. Click on **Change Status** when it appears and a 'Change Status' box will display. Fill in the details, enter password and click **Update**.

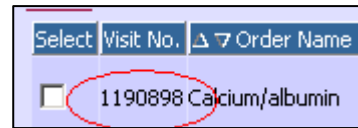


5.0 Add an Order to an Existing Order


NOTE: You must only add an order if the specimen has **not** been sent to the lab

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1. Select patient details and select the EPR tab
2. Select Order details by clicking on the down arrow at the left side of the EPR screen and clicking on Order details tab



3. Note visit number (See picture right)

4. Close order details box by clicking on the  at the top right of the box (**NOT** the top right of the screen). Select order at the top of screen. (see example right)

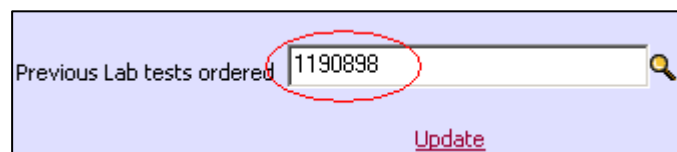


5. Select the test that you wish to add.

6. In the orders box you should see the test. Click on the link (see picture below)

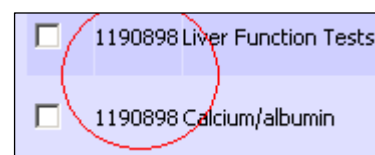


The laboratory orders details box will now appear



7. Enter the visit number of the test you are adding to into the 'Previous lab tests ordered' field or use the search icon to find your test. (See example above)
8. Select **update**. If you are adding more than one order, this must be done for each one.
9. Select the **specimen collected now** box.
10. Enter user name and password and complete the rest of the order as you would normally.

Note: To check if the add-on has been done correctly go to the EPR/Order details screen. Your added test should have the same visit number as the original test (see picture right)



Appendix 2 Ordering when TRAK is not available

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A Laboratory request received with inaccurate or incomplete data is a **Clinical Governance issue.**

The associated risks include:

1. Incorrect results assigned to the wrong Patient.
2. Multiple Patient records produced for a single Patient. This is extremely time consuming for reviewing Patient records, accordingly results may be missed.
3. Patient's results may inadvertently be filed in the wrong patient's files. Down to inadequately or wrongly labelled tests results.
4. The ability to view cumulative reports is restricted with multiple files from the same patient.

Requests for laboratory analysis within NHS Lothian may be rejected if the specimen container or the request forms do not comply with the Mandatory Data Requirements.

Inadequately or wrongly labelled test requests, which have a precious specimen element, will be referred through the Laboratories Specimen rejection policy.

PID labels, available in patient's healthcare records, must be used in all cases.

Only in situations where there are no labels should the following information be legibly handwritten:

Mandatory Data Set (MDS)

Mandatory patient demographics:

5. Patient Identifier Number (PAS,CHI).
6. Surname
7. Forename
8. Date of Birth
9. Gender
10. Location

NB. If the Patient Identifier Number is unavailable then the MDS includes:

11. Postcode

Mandatory information required on the sample:

12. Surname
13. Forename (preferably) or initial
14. Date of Birth
15. Sample date /time.

NB. Microbiology samples must have the sample type and site recorded.



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NB. PATIENT LABELS SHOULD NOT BE USED ON THE FOLLOWING TUBES:

- BTS samples
- ESR tubes
- Haematology samples at **RIE** site
- ALL paediatric samples.

REQUESTS MAY NOT BE PROCESSED UNLESS THE MANDATORY DATA SET IS PROVIDED

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Appendix 3 Baseline Investigations for All Patients Presenting to Hospital

All patients who present to hospital will have an admission set of baseline bloods that will consist of:

- Full Blood Count (FBC)
 - Glucose
 - Urea and electrolytes (U/E)
-
- **Except if Viral Haemorrhagic Fever is a possibility in which the investigations must be discussed with a consultant ID physician and senior laboratory staff before collection.**

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Appendix 4 - Additional Investigations

All patients who present with the following conditions or suspected clinical condition will have the following bloods taken:

Diagnosis	Blood Sets
Confusion	FBC, U/E, Glucose, CRP, Urine for microbiological examination
Stroke/TIA	FBC, U/E, lipids, ESR, glucose
Renal Colic	FBC, U/E, LFT, Urate, Ca+
Seizures	FBC, U/E, LFT, glucose, CRP, Ca+ Epileptic Drug assays
Pleuritic Chest Pain	FBC, U/E, CRP, D-Dimer, Coag
Chest Pain	FBC, U/E, lipids, admission Trop, glucose
Asthma	FBC, U/E
GI Bleed	FBC, U/E, LFT, Group and Save, Coag
Collapse	FBC, U+E, Glucose
Sepsis	FBC, U/E, LFT, glucose, CRP, lactate
Cellulitis	FBC, U/E, glucose
DVT	FBC, U/E, LFT, Coag, D-Dimer
Abdominal Pain	FBC, U/E, LFT, Amylase, Urine for microbiological examination, Urine pregnancy test (if female and of child bearing age).
Pancreatitis	FBC, U/E, LFT, Amylase, Calcium, CRP, Urine for microbiological examination, LDH, Triglycerides.