

Research Blood Collection

Overview:

Consult with the WCH lab at Study Start-up

- Consult with WCH Lab during the startup process to obtain approval for using lab services (if you will be using them)
- Collaborate with WCH Lab to confirm the content of the 'Research Instructions' *SmartPhrase* to add to the order comments, based on your study-specific requirements
- If your research specimen orders will be collected by nurses (inpatient or outpatient), it is important to have a process in place with the relevant clinical team(s) as to where/when the research specimen is expected to be collected


Where are the Research Specimens Collected?

Depending on the specimen type, research samples may be collected by:

- Lobby Lab (Phlebotomy/phlebotomist on unit)
- Unit/clinic nurse

Research Specimen Collection Orders

*Regardless of where the research sample is collected and who collects it, **every research specimen collection at WCH requires an order to be placed in Epic.** As of December 21, 2022, there will be 1 'Research' specimen collection order available in Epic. More order will be developed and available in 2023.*

	<p>Always consult with WCH Lab at study setup regarding the appropriate orders to place, and follow their guidance with regards to <i>Research Instructions</i> order comments (that your study team will create SmartPhrases from).</p> <ul style="list-style-type: none">■ Please see the Appendix for a complete list of these Research specimen orders, along with the order 'synonym' code that appears on their barcoded specimen labels when collected
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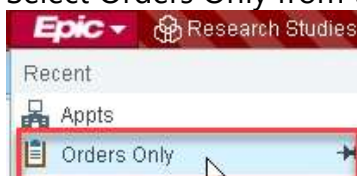
Name	Type	Pref List	Px Code
  Research Blood Collection Order	Lab	LABS	LAB9135

Which Encounter to Use When Placing a Research Specimen Order?

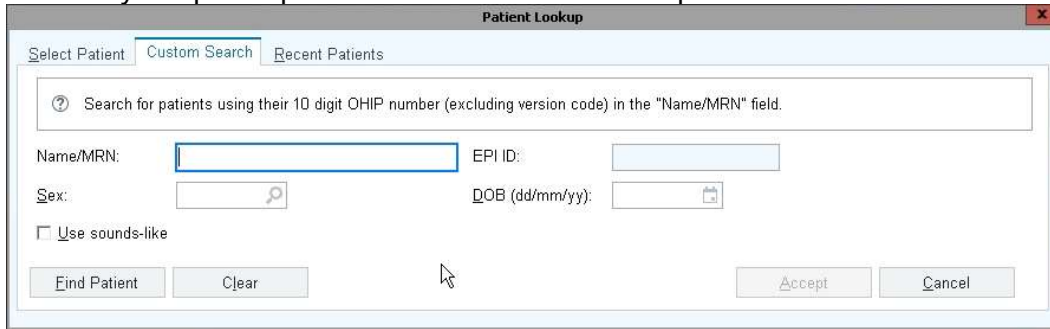
It is recommended that the research order be placed/pended in an **Orders Only encounter**.

To place an order in Epic using the Orders Only encounter, follow these steps:

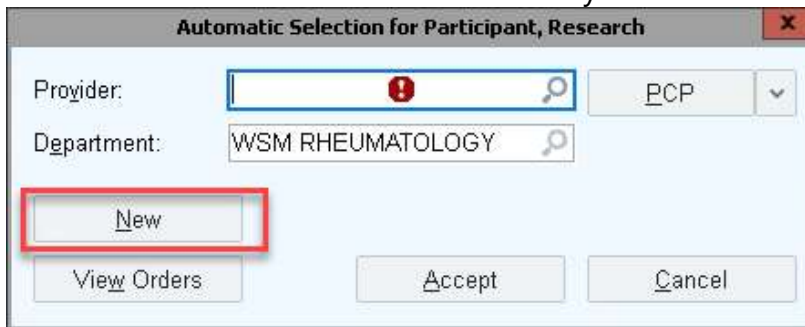
1. Select Orders Only from the Epic button



2. Choose your participant from the Patient Lookup window




3. Choose a provider (i.e., your study PI or Qualified Investigator) and Department, and click the **New** button to create the Orders Only encounter



Your new **Orders Only** encounter workspace will open, allowing you to enter the study orders.

Non-clinical research staff (e.g. Research Assistants, Research Coordinators, Research Managers, PhD non-clinical Investigators) will use the Orders Only Navigator to pend their study orders.

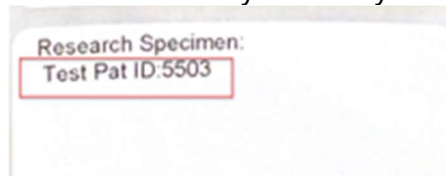
4. Click Add Order button  at the bottom left of the screen
5. In the search order dialog box type Research Blood Collection
6. Select the order (LAB9135) from the order search dialog box
7. Click Accept

8. Complete the order form:

The screenshot shows the 'Research Blood Collection Order' form. At the top, there are buttons for 'Accept' and 'Cancel'. Below that, the 'Expected Date' is set to 20/12/2022, and 'Expires' is set to 20/06/2023. The 'Priority' is set to 'Routine' (with 'STAT' also visible), and the 'Class' is 'WCH Lab Collect'. The 'Specimen/container description' field contains 'Test for research - Participant ID #345-AB3421'. The 'What study is this order placed for?' field contains 'WCH Testing Study'. The 'Study Principal Investigator?' field contains 'WCH RESEARCH PI PROVIDER'. The 'Number of tubes required' is set to 2. The 'Are lab services required?' field has 'Yes' selected. The 'Services' section has 'Aliquot' checked and 'Spin' unchecked. The 'Is this timed collection?' field has 'One Time Collection' selected. The 'Cc Provider' field is empty. The 'Who is the study coordinator for this study?' field is empty. The 'Comments' field contains the following text: 'Please collect in the 2 tubes provided as follows: - purple top - 2ml; - yellow top - 1ml Once collected, send to lab to spin and aliquot as follows: - spin ant 500rpm Store each tube at -20 degree'. Red callout boxes with numbers 1 through 7 point to the following fields: 1. Priority dropdown, 2. Class dropdown, 3. What study is this order placed for? text box, 4. Study Principal Investigator? text box, 5. Number of tubes required input box, 6. Are lab services required? Yes/No buttons, 7. Comments text area.

Choose the order date and Priority (WCH Lab Collect or WCH Clinic Collect)

1. Choose the place where the blood will be collected
2. Enter the information to be printed on the label. Use this field to describe the container to be used for collection, e.g. Red top tube AND/OR you can also enter the REB number of your study AND/OR patient ID, etc.



For example:

This information will be printed onto the barcoded sample labels during the collection process, and will help the specimen collector to easily identify/match which container to place the barcode on.

3. Use this field to enter your study – use the name or REB # to search for your study record. Note that this is a mandatory field. Remember that you are still required to **associate the order to your study using the Research Association button!**

4. Search for your study Principal Investigator by name. Note that this is a mandatory field.
5. If the WCH Lab is providing collection containers/tubes, then select '**No**' as a response. If you are bringing your own study containers, or the specimen is being collected by a nurse in a clinic/unit, then select '**Yes**' as a response.
IMPORTANT NOTE: This question is currently *not* available, and the number of tubes will **have to be provided in the Comments** section of the order. In addition, you will need to choose the number of tubes/containers. The number of labels will print based on this number (if 3 is chosen, then 3 labels will print – one on each tube). Note, this is a mandatory field.
6. This is a cascaded question. Answering '**Yes**' means that you require WCH Core Lab services, therefore the system will prompt you to select the services required, i.e.:
 - i. Aliquot
 - ii. Spin

Note that each service has a cost attached to it.

If your research samples are to be collected and sent by the study team directly to the study sponsor, or processed in a research lab, without being processed/resulted in any way by WCH Lab, then select '**No**' as the response for this question.

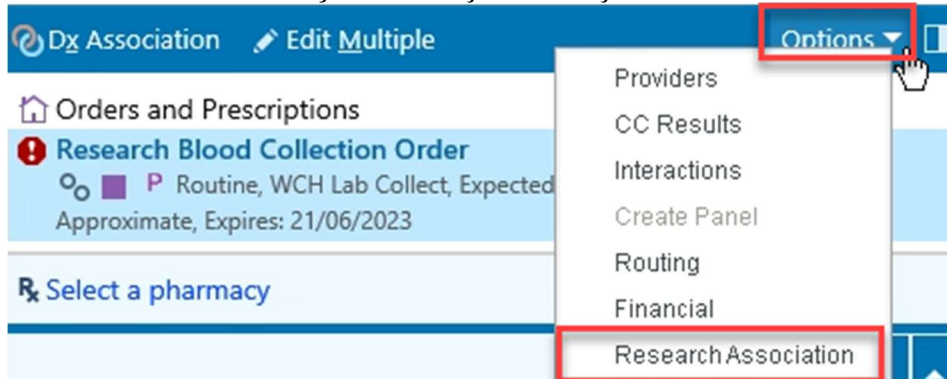
NOTE: You will also need to specify when you want your sample to be collected. If your sample is a one-time request for the day then select '**One Time Collection**'. If your sample should be collected prior/post intervention, then make the appropriate selection.

7. In the **Comments** box you may enter one or more of the following:
 - i. Let the specimen collector know when the sample should be collected; for example, 'ONLY collect sample with next Nephrology clinic visit on May 23, 2023'
 - ii. Number of tubes needed or provided
 - iii. Which tube(s) is to be used for collection (e.g. Orange top tubes)
 - iv. Amount of blood to be collected
 - v. Research team's contact information
 - vi. Any Lab collection/processing/storage instructions (e.g. storage temperature)

NOTE: All Research Instructions can be entered in a SmartPhrase

9. Click Accept

10. Click the **Research Association** button from the **Options** list and use the checkmark grid to link this Phlebotomy order to your study



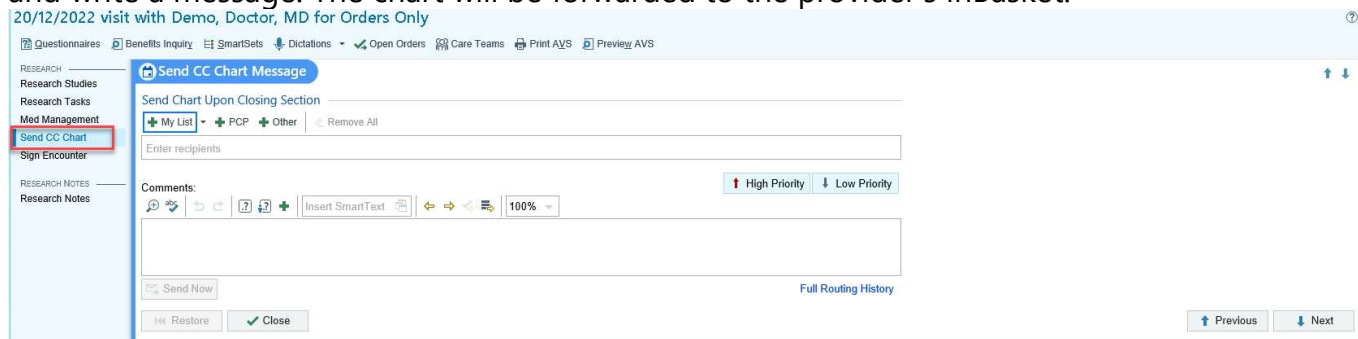
11. This Research Association button will only appear if the patient is research active

Your study order is now marked with an icon to indicate that it is research-associated

12. Click the Pend button to save this order in the patient's chart

In a paper world, pending would be the equivalent of writing the orders on a piece of paper or filling out an order sheet and leaving it for a provider to sign

13. Click the Send CC Chart section of the Visit Navigator, choose the appropriate provider and write a message. The chart will be forwarded to the provider's InBasket.



14. Click Close to send your message

'Closing' this section sends the message when the dropdown menu to the left of the Send Chart section is set to "Send on Closing Section.

Since this sample collection is for research purposes only and it is not being processed/resulted the results will not be automatically available in the patient's Epic chart.

Tracking Research Specimen Collection Orders

A. Chart Review activity > Labs tab

Epic users (including research coordinators and clinical users) can view research specimen collection orders in the Chart Review activity tab as follows:

1. In the Chart Review activity, select the Labs tab

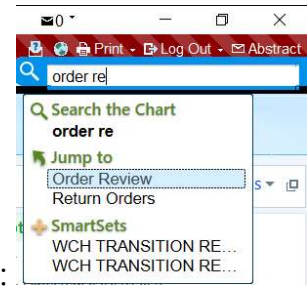
A...	Date/Time	Test	Status	Encounter Type	Patient Sharing	Research
Recent						
	20/12/2022 13:10	Research Blood Collection Order	Active	Orders Only	Not Released	
	20/12/2022 12:03	Research Blood Collection Order	Active	Orders Only	Not Released	
	20/12/2022 10:20	Research Blood Collection Order	Active	Orders Only	Not Released	
	20/12/2022 10:20	Research Blood Collection Order	Active	Orders Only	Not Released	

- The 'Status' (i.e. Order Status) column of the Labs tab may show the following statuses:
 - o Future - outpatient order that has been signed but not yet released to be collected
 - o Sign&Held - inpatient mode order that has been signed by study physician/PI, and can be released to be collected
 - o Collected – specimen label was printed for this signed order and collection has been documented
 - o Discontinued - order has been cancelled/discontinued
 - o Expired - outpatient order that has expired
 - o Final result – order has been finalized – no result will be filed for Research orders

B. Order Review activity > WCH Released Orders

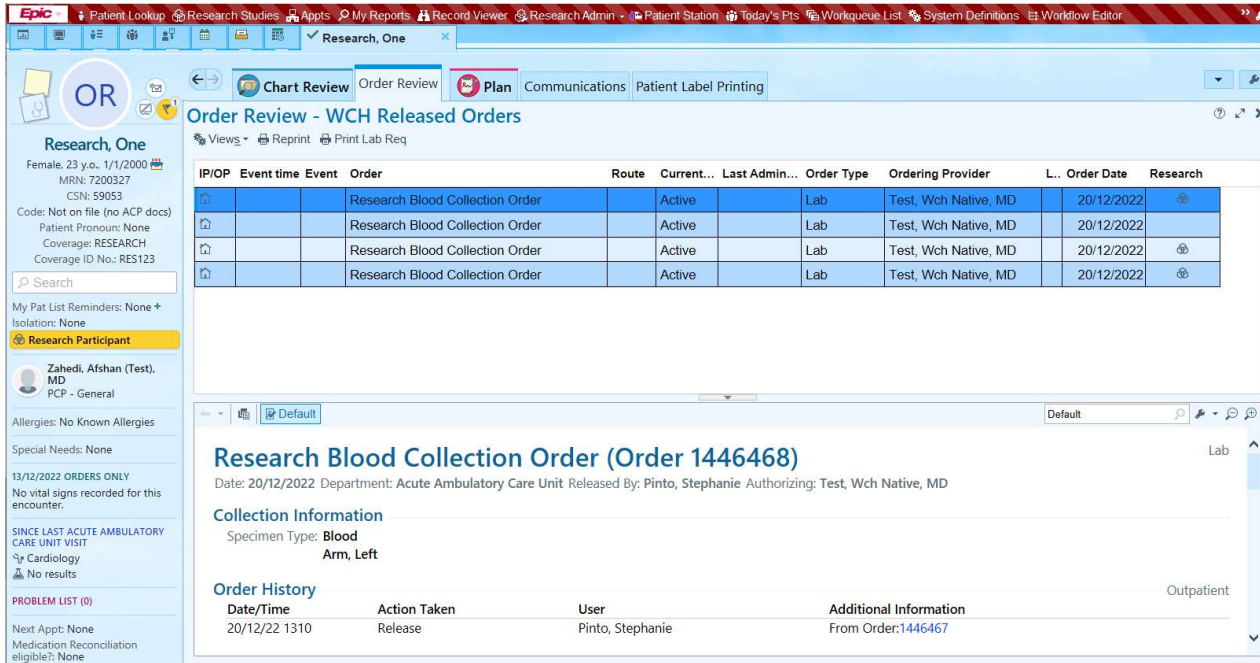
Research staff have access to the Order Review activity through the 'Research Studies' activity. The Order review report provides a convenient tool to review clinical and research-related blood collection and lab tests. You may access this tool as follows:

- 1) Look-up a patient via the Research Studies button in the Hyperspace toolbar



2) Go to the Order Review activity (search for it in the search dialog box):

The following window will display:



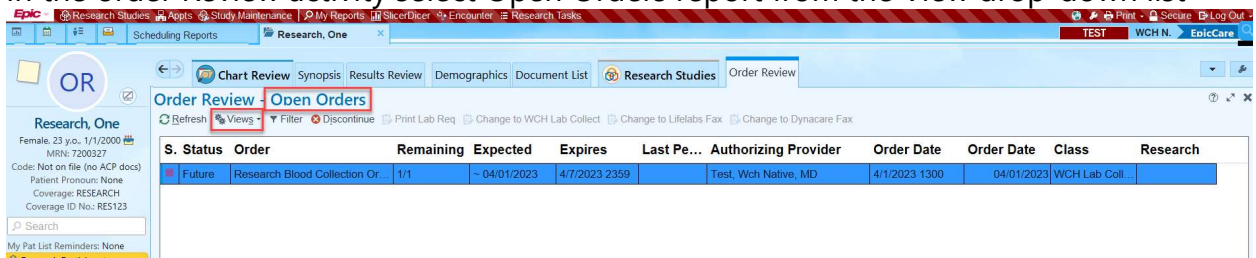
To view the orders that have not been released as yet, click on the Views button in the toolbar (gears icon) and select the Open Orders option

C. Cancelling Research Lab/Specimen Orders

Study Coordinators may be able to cancel/discontinue select 'Research' orders in Epic that have been signed by a study physician but not yet acted on.

To cancel an order:

1. In the order Review activity select Open Orders report from the View drop-down list



- Click on the order you would like to cancel and then click the "Discontinue" button
- Select the appropriate reason for discontinuing the order

Cancel Order ✕

Research Blood Collection Order

Reason for canceling:

Comments:

✓ Accept
✕ Cancel

- Add comments if needed
- Click on Accept button

The order will display in the patient's Chart review -> Labs as discontinued.

The screenshot shows the 'Chart Review' interface with the 'Labs' tab selected. A table lists several 'Research Blood Collection Order' entries. The entry for 'Today at 13:00' is highlighted in blue, and its 'Status' is 'Discontinued'. The other entries are 'Active'.

A...	Date/Time	Test	Status	Encounter Type	Patient Sharing	R...
	Today at 13:00	Research Blood Collection Order	Discontinued	Orders Only	Not Released	
	20/12/2022 13:10	Research Blood Collection Order	Active	Orders Only	Not Released	
	20/12/2022 12:03	Research Blood Collection Order	Active	Orders Only	Not Released	
	20/12/2022 10:20	Research Blood Collection Order	Active	Orders Only	Not Released	
	20/12/2022 10:20	Research Blood Collection Order	Active	Orders Only	Not Released	