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, <u>every</u> 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.

Always consult with WCH Lab at study setup regarding the appropriate orders to place, and follow their guidance with regards to *Research Instructions* order comments (that your study team will create SmartPhrases from).

 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

		Name	Туре	Pref List	Px Code
	0	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. <u>Select Orders Only from the Epic button</u>

Epic -	🚱 Research	Studies
Recent		
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2. Choose your participant from the Patient Lookup window

		Patient Lookup		
Select Patient Cust	om Search <u>R</u> ecent Pati	ents		
⑦ Search for pat	ients using their 10 digit C	HIP number (excluding version code) in the "Name	e/MRN" field.	
Name/MRN:		EPI ID:	79	
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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

A	utomatic Selection for Participant,	Resea	rch	
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View Orders	Accept	191	Cancel	

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

🕈 ADD ORDER 🛛 🞘

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:

Research Blood	Collectio	n Order						Accept X Cance	el
	Expecte	d Date: 20/12/2022	Today Tom	orrow 1 Week	2 Weeks 1 M	onth 3 Months	6 Months 1 Year	Approx.	
	Expires:	20/06/2023	1 Month 2	Months 3 Mon	ths 4 Months	6 Months 1 Yea	ar 18 Months 2 Y	ears 3 Years	
Priority:	Routine	P Routine	STAT	1	2				
Class:	WCH Lab	C,O WCH Lab	Collect WCH Clini	c Collect					
Specimen/conta description	ainer	Test for research -	Participant ID #345-	AB3421					
What study is the placed for?	his order	WCH Testing Study					-	- 3	
Study Principal Investigator?		WCH RESEARCH PI	PROVIDER				4	- 4	
Are the collection	on <mark>c</mark> ontai	ners provided by re	search team?	_					
Number of tube required:	es	2		5					
Are lab services required?		Yes No	6						
Services:		✓ Aliquot Sp	in						
Is this timed col	llection?	Pre-Intervention	Post-Intervention	One Time Colle	ection				
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Who is the stud coordinator for study?	ly this								
Comments:	🔁 🥸	5 2 2 2 4	Insert SmartText	Ē 😓	⇒ 👍 🛼				
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Show Additional C	Order Det	ails ₩							~
Next Required								Accept X Cance	el

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.

	Research Specimen: Test Pat ID:5503	
For evample:		

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.

 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 <u>associate the order to your study</u> <u>using the Research Association button!</u>

- 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. <u>IMPORTANT NOTE</u>: 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 or 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 enter 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

	Options T	. 🗖
 Orders and Prescriptions Research Blood Collection Order P Routine, WCH Lab Collect, Expected Approximate, Expires: 21/06/2023 	Providers CC Results Interactions Create Panel	¢)
R Select a pharmacy	Routing Financial	
	Research Association	

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.

20/12/2022 visit	with Demo, Doctor, MD for Orders Only	٢
In generation and a second state of the second	G Send CC Chart Message Send CC Chart Message Send CC Chart Message Image: Send CC Ch	t I
	Full Routing History	1 Previous 1 Next

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

Epic - 🛊 Patient Lookup 🛞	Research Studies 🔒 Appts 🔎 My Reports 💾 Record Viewer 🔞 Research Admin	- 🗈 Patient Station 🐞 Today's Pts 🖷 Workque	ue List 🐐 System Definitions 🗉 Workflow Edit
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	Chart Review Review Flowsheets History Allergies Prot	olems Immunizations Encounter Place	Orders Write Note Send Letter Call Pa
Research, One Female, 23 y.o. 1/1/2000 H MRN: 7200327 Code: Not on file (no ACP docs) Patient Pronoun: None Coverage: RESEARCH	■ Encounters Notes Labs OLIS Labs Imaging Cardiology Proced V Results Review □ Preview □ Refresh (12:51 PM) ■ Select All ■ □ ▼ Eitlers ♥ Hide Canceled □ Micro □ Path/Cyto □ Labs Final Results A Date/Time Test ■ ■ ■ ■	ures Meds Media Letters Episodes Re eselect All 🔁 Revie <u>w</u> Selected 🖽 Side-by-Sir Status Encounter Type	ferrals Other Orders SnapShot je Synopsis ∰ Lab Flowsheet =
Coverage ID No.: RES123	Recent		
My Pat List Reminders: None + Isolation: None	20/12/2022 13:10 Research Blood Collection Order 20/12/2022 12:03 Research Blood Collection Order	Active Orders Only Active Orders Only	Not Released
Research Participant	Research Blood Collection Order	Active Orders Only	Not Released
Zahedi, Afshan (Test), MD PCP - General	20/12/2022 10:20 Research Blood Collection Order	Active Orders Only	Not Released 🚳
Allergies: No Known Allergies			

- The 'Status' (i.e. Order Status) column of the Labs tab may show the following statuses:
 - Future outpatient order that has been signed but not yet released to be collected
 - Sign&Held inpatient mode order that has been signed by study physician/Pl, and can be released to be collected
 - 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
 - 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:

Epic - Patient Lookup &	Research Studies 🔒 Appts 🕽	My Reports H Record Viewer	🚱 Research Admin 🔸 🕮 P	atient Station	n 🐞 Today's Pts	🖷 Workqueue	Elist 🀐 System Definitions E	: Work	flow Editor		
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Female, 23 y.o., 1/1/2000 📇 MRN: 7200327	IP/OP Event time Event	Order	Route	Current	Last Admin	Order Type	Ordering Provider	L (Order Date	Research	
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Zahedi, Afshan (Test), MD PCP - General					•						
Allergies: No Known Allergies	🔶 👻 📲 😰 Default							Defa	ult	, ,	• 0 \$
Special Needs: None	Research B	lood Collection	n Order (Ord	ler 14	46468)						Lab
13/12/2022 ORDERS ONLY No vital signs recorded for this encounter.	Date: 20/12/2022 Dep	artment: Acute Ambulatory C	are Unit Released By: Pi	nto, Steph	anie Authorizi	ng: Test, Wch	Native, MD				
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Next Appt: None Medication Reconciliation eligible?: None	20/12/22 1310	Release	Pinto, Stepha	nie		From Or	der:1446467				_

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

Order Review Openographics Document List	Constraints of the constrai	301	equiling Reports	- Research, one	1					
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- 2. Click on the order you would like to cancel and the click the "Discontinue" button
- 3. Select the appropriate reason for discontinuing the order

Cancel Order		×
Research Blood Collecti	on Order	
Reason for canceling:		
	0	, O
C <u>o</u> mments:		
	✓ <u>A</u> ccept	× Cancel

- 4. Add comments if needs be
- 5. Click on Accept button

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

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Chart	Review					(? X
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¥ Result	s Review	v 👻 🕃 Refresh (6:33 PM) 📕 Select All 📄 Deselect All 🖄 Review Selected 🖫 Side-by-Side 🗑 Synopsis 🕼 Lab Flowsheet 🛋 Route	Add to Bookmarks			
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A	Date/Time	Test	Status	Encounter Type	Patient Sharing	R.
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Recent						
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11	20/12/2022 12:03	Research Blood Collection Order	Active	Orders Only	Not Released	
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