Basic Triage Steps

Purpose: To standardize methods of basic investigative research in regards to routine issues.

Procedure: When a client or region calls for pending tests or other routine issues that have not followed expected operating procedures and protocols. The customer service representative will perform the following steps and provide limited information to the caller.

1. Locate accession number and verify patient demographics and client
   a. Name search
      i. Partial name searches with use of " * " – SMI*,DAVID
      ii. Partial name search without using the comma – SMIT*DA
      iii. Add a space between the last and first name or before the last name. Remember in MISYS a space is considered a character – SMITH DAVID
   b. AA-ZZ search
      i. With either account number and/or DOB filters
   c. Account search
      i. With date of collection filter
      ii. With test code filter
   d. Requisition, PID, or Medical Record search
2. Review collection date, received date & time, and unit code information.
   a. Not on File list
   b. Extra Result list
3. Review the daily report for any known current issues or shipment delays. These are mailed daily in the morning.
   a. Referral emails about reagent backorders
   b. Company announcements for new tests or instruments
4. Review any and all applicable CP notes.
5. Review if the accession has an SIQ or TIQ, and it has not been resolved, send the pending request to exception handling by CP notes.
   a. Enter through results to read resolutions of SIQ/TIQs
   b. Check CP notes
6. If the test is at a reference laboratory, contact the reference lab or referral department.
7. If all previous steps have been followed and still unable to resolve issue speak with a lead.