Pretransfusion Testing – Specimen Collection

TRAINING GUIDE
TM T-08
OVERVIEW

This training manual includes information about collection of pretransfusion testing specimens for patients attending collection facilities external to Calgary Laboratory Services. It is intended to be used by staff requiring direction about the collection of pretransfusion testing specimens to be tested at a CLS facility for patients who will be (potentially) transfused at an acute care site in Calgary.

LEARNING OBJECTIVES

At completion of training, the trainee will be able to:
- Demonstrate appropriate patient identification practices
- Demonstrate understanding and application of the Regional Transfusion Service Identification System (RTSIS)
- Collect the correct specimen type and volume
- Document specimen collection in compliance with current CLS policies and procedures.

SCOPE

This training guide applies to all persons collecting pretransfusion testing specimens to be tested at Calgary Laboratory Services.

DEFINITIONS
**RTSIS** Regional Transfusion Service Identification System – the Blood Bank Identification (BBID) system used by Calgary Laboratory Services. It can be either the second page of form TM2199 or CAL0997.

**LIS** Laboratory Information System – a computer system used in laboratory operations: specifically, the system that generates accession labels.

**ROLES AND RESPONSIBILITIES**

Personnel collecting pretransfusion testing specimens to be tested by CLS Transfusion Medicine are expected to comply with the instructions provided in this document. Additional information can be found on the CLS Website. See CLS Guide to Laboratory Services.

**PROCEDURE INSTRUCTIONS**

1. **Patient presents** with a CLS Pretransfusion Testing Requisition REQ9004TM and RTSIS form or the two part form, Pretransfusion Testing Requisition–PAC TM2199 (see below). The patient must have both items to proceed with the collection.
REQ9004TM and RTSIS:

or
Transfusion Medicine TM T-08 Pretransfusion Testing Specimen Collection

TM2199 (two part form):

Photocopied RTSIS forms may not be used; the patient must have an original form in order to proceed with the collection.

The patient must also present with two pieces of original government-issued identification. The preferred identification is a Provincial Health Card (PHN).

Other acceptable forms of ID include: valid driver’s license or passport, birth certificate or Canadian Permanent Resident card, etc.

2. **Compare the name and provincial health care number** on the provincial health care card with the requisition to ensure they match.
a. Discrepancies must be resolved before the specimen is collected. Refer the patient back to the preoperative clinic that supplied the requisition.

3. Enter the test in the LIS to obtain labels.

4. Check/complete the preoperative assessment section for completeness. If incomplete, ask the patient the questions and record the information. The pregnancy question only needs to be asked of women 45 years of age or younger.

   If the answer to either question is “yes”, testing is only valid for 96 hours (4 days). Continue to the next step only if the patient’s surgery is scheduled within 4 days. If surgery is scheduled more than 4 days following the current date, advise the patient to return for testing within 4 days of their scheduled surgery date. If the OR date is unknown, write “Unknown”, do not leave blank.

5. Complete the tube labels and “Permanent Record” section on the RTSIS form. Apply an LIS label to each of the “tube label” and the “permanent record” sections of the RTSIS form. If LIS labels are not available, transcribe the information from the requisition. Write the date and time of collection on the tube labels if this does not appear on the LIS labels.

   When hand writing information on tubes and/or the RTSIS form, print clearly and carefully. Discrepancies created by transcription errors or illegible labels will result in specimen rejection.

6. Identify the patient:

   a. Ask the patient to spell their full name. Compare to the information on the RTSIS form.

   b. Ask the patient their date of birth. Compare to the information on the requisition.

   If there are discrepancies, do not collect the specimen. Refer the patient back to the preoperative clinic that supplied the requisition.

   c. Check the box “Patient Identified by: him/herself” on the RTSIS form.

   If the patient is unable to identify themselves (younger than 14 years of age, language barrier, mental incapacity etc.) a friend or family member may identify them. The person who identifies the patient must sign the RTSIS form on the signature line next to “Patient Identified by: ”. Write
the relationship of the identifier next to the signature (son, friend, mother etc.)

7. **Draw specimen.** Two 6 mL **draw EDTA (lavender) tubes** are required for adults. See the CLS Guide to Laboratory Services for specimen requirements for pediatric patients.

8. **Place the tube labels from the RTSIS form on the tubes,** orienting the RTSIS number next to the tube stopper.

9. **Date the wristband insert.** Write the current date on the wristband insert at the bottom of the RTSIS TM2199 or along the side of CAL0997 form.

10. **Remove the band** insert from the RTSIS form, insert into the yellow band and **attach to the patient’s wrist** (or ankle). Ensure that the band is not too tight as some patients may experience swelling.

![Image of wristband](image)

Specimens received with corresponding RTSIS forms on which the band insert is still attached will be rejected.

11. **Sign and date the section “Specimen Drawn By:”** on the “Collection Record” section of the RTSIS form.

   a. CLS Transfusion Medicine will attempt to obtain missing signatures. If they cannot be obtained, the specimen will require recollection.

12. **Forward the requisition, specimens and completed RTSIS** form to Calgary Laboratory Services – Foothills Medical Centre for testing.

**NOTES**

Errors in the collection procedure or discrepancies between the specimen label and accompanying documentation will usually require recollection. This is because collection or labeling errors can result in the death of the patient if they receive an incompatible blood transfusion as a result of a collection error.

The RTSIS is the BBID number used by Calgary Laboratory Services. Like all other BBID systems, it reduces the risk of incompatible transfusion by linking the patient to the
specimen to the donor unit back to the patient. In order for it to be effective, it is crucial that the system be applied at the time of specimen collection.

REFERENCE INFORMATION

CLS Guide to Laboratory Services