American Red Cross Biomedical Services	Doc No 18.3.104	Version 1.0
Work Instruction: **Placing a Sample on Hold**		

What this work instruction is about

This work instruction explains the process for placing a Hold on a sample ID and is used in conjunction with the directive on Surround. [18.2.12]

Who should know how to perform this work instruction

This work instruction applies to staff who use Surround at the National Testing Laboratories (NTL). The specific audience includes Surround users with capability.

Introduction

A Hold is placed on a sample ID in cases such as when sample suitability or test validity is in question. Test results will not be transferred to the client until all Holds are removed from the sample ID. This procedure may be followed to place one Hold or multiple Holds.

Placing a Hold

1. Open the Sample Viewer module.

▲ Caution: The correct format for entering a single alpha sample ID is *nnna<space>nnnnn.*

2. In the "Enter Sample ID" field, enter the sample ID.

Client name, pending tests, and any results are displayed.

This step is a critical control point because incorrect entry may cause the release of incorrect test results.

3. Click <Add Hold>.

4. In the "Enter a Hold Reason" field, enter a reason for placing the Hold.

5. Click <OK> to close the window and return to the Sample Viewer window.

Surround adds the Hold, creates an audit trail of the Hold addition by the user ID, and updates the information in the Sample Viewer window.

6. Do you need to add a Hold to another sample ID?

☐ **If yes, go back to Step 3.**

☐ **If no, go to the next step.**

▲ Caution:	The header for an automatically-generated and printed report reflects Eastern time (server time). The header for a user-generated and printed a report reflects the workstation time (which may not be Eastern time).

7. Generate and print the Sample Hold report. [18.3.097]

This is an audit trail that should be reviewed before printing to ensure the Hold was placed on the correct sample ID.

Forms and records

Sample Hold report

Referenced documents

- 18.2.12, Directive: Surround
- 18.3.097, Work Instruction: Generating On-Demand Surround Reports
- Surround 4.3 User's Manual, Edition 025

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