

Mock Tracer Tracking Worksheet: The Laboratory Tracer*

Use this worksheet to record notes and areas of concern that you identify while conducting your organization's mock tracers. This information can be used to highlight a good practice or to determine issues which may require further follow-up.

Tracer Team Member: _____ Tracer Patient or Medical Record: _____

Staff Interviewed: _____

Unit or Department Where Tracer Was Conducted: _____

TRACER PROMPTS	Correct Processes Observed	Areas of Concern	Follow-Up Needed	Required Written Documentation		Notes
				Required?	Present?	
1. Describe your laboratory process to handle transfusion reactions.						
2. What training and orientation have been provided to laboratory staff to handle transfusion reactions?						
3. What data and analysis have you done on the incidence of transfusion reactions in your						

* **Adapted from:** Joint Commission Resources. The laboratory tracer. *The Source*, 2010 Sep; 8 (9): 6–9.

organization?						
4. What measures have you introduced, if any, to reduce the incidence of transfusion reactions?						
5. What measures have you introduced, if any, to reduce the incidence of transfusion reactions?						
6. What initial assessment do you perform for new transfusion patients?						
7. What were the specimen collection requirements for the tests performed for this tracer patient? Where were they collected?						
8. What process did you follow for preparing blood units for this patient's transfusion in an outpatient setting?						
9. What instructions did you provide to this tracer						

patient?						
10. What is your laboratory's policy for ordering a stat procedure?						
11. How do you verify orders for laboratory testing?						
12. How do you determine who is authorized to give those orders?						
13. What is your quality control process? When is corrective action required?						
14. What is your quality control process for the basic metabolic panel?						
15. What is your process for accepting and rejecting a quality control result?						
16. What is your process when your quality control data reflects a positive or a negative bias based						

on interlaboratory data?						
17. What do you do when your quality control results are higher than acceptable peer data?						
18. What prompted you to suspect a transfusion reaction in this tracer patient?						
19. What is your policy for addressing a patient exhibiting signs and symptoms of a suspected transfusion reaction?						
20. What protocol did you follow to address this patient's continued temperature increase?						
21. What is your assessment process for a new patient?						
22. Please describe your entire process for administering blood to a patient.						

23. What is your organization's process for handling a new patient?						
24. What is your documentation process?						
25. How is that documentation reported?						
26. If you have a question or a problem with documentation or necessary information, what do you do?						
27. When you did not receive the expected sample, what protocol did you follow? Whom did you notify about this situation?						
28. What process did you follow to document or handle an incomplete diagnosis or test result for this patient?						
29. Would your process for daily review have						

detected this?						
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