Guideline for allied health professionals requesting pathology tests

Published by the State of Queensland (Queensland Health), July 2018

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1. Introduction

The ability to request pathology tests is consistent with the assessment and clinical reasoning functions of allied health practitioners and is within the full scope of practice for these professionals. Allied health pathology requesting can contribute to:

- reduced delays in appropriate client management
- enhanced patient flow and improved continuity and coordination of care
- standardisation of patient care within an appropriate clinical governance framework
- increased patient satisfaction
- reduced number of unnecessary pathology tests with a subsequent reduction in pathology costs
- reduced high workloads of some medical and nursing staff
- improved interprofessional relationships.

1.1 Purpose

Pathology Queensland has developed the Pathology Queensland specific protocol for pathology requests by allied health professionals: Overarching Protocol (Appendix 1) which provides the minimum clinical governance arrangements to support the requesting of pathology tests by allied health professionals.

The aim of this guideline is to ensure appropriate pathology requesting practices for allied health professionals and appropriate clinical governance arrangements are in place within Queensland Health facilities to support high quality patient care.

1.2 Requirements

To meet the conditions outlined in the Pathology Queensland specific protocol for pathology requests by allied health professionals: Overarching Protocol allied health professionals requesting pathology tests are required to comply with the following:

- allied health professionals work within their scope of practice
- have an Agreement (Appendix 2) with a supervising medical officer detailing the clinical governance arrangements for the requesting of tests and actioning of results (see 3.1 below)
- request pathology only via Pathology Queensland which means:
  - pathology requests can only be made for PUBLIC patients (inpatients or outpatients)
  - episodes of care provided in the emergency department (ED) and/or on the ward on the same day as an ED presentation are not considered to be an eligible private episode and therefore the allied health professional may request pathology for these patients
  - when pathology requests are made for outpatients, the allied health professional may need to provide a paper copy of the pathology request to the patient (check local procedures) and needs to inform the patient to attend a Pathology
Queensland collection centre only (i.e. not a private provider otherwise the results will not be returned to the requesting clinician and the patient may have to pay for the tests)

- complete pathology requests in accordance with Pathology Queensland instructions
- undertake a positive patient identification process
- review and action the results of requested pathology including escalation of results as agreed and documented in the agreement.

2. In Practice

Establishing clear and consistent processes will support appropriate pathology requesting practices by allied health professionals.

2.1 Considerations

Consideration should be given to the following:

- pathology requests must be appropriate to the presenting condition or interim diagnosis with the expectation that the results will provide relevant information relating to the care of the patient
- ordering of tests are aligned with best practice guidelines
- the cost of the pathology testing will be billed to the Hospital and Health Service (HHS), so the financial implications are to be considered as part of the decision-making process, specifically the need, appropriateness and cost of the test/s requested
- allied health professionals should refer to the Choosing Wisely Australia principles which aim to improve the quality of healthcare by eliminating unnecessary and sometimes harmful tests, treatments, and procedures
- governance around results endorsement is critical – allied health professionals are responsible for reviewing and actioning the results of tests they request. This includes escalation of results as agreed and documented in the agreement.

2.2 Pathology requesting for allied health professionals: non-ieMR sites

AUSLAB is the integrated laboratory information system used in Queensland Health pathology, clinical measurements, forensics and public health laboratories.

To gain access to AUSLAB to order pathology tests at non-ieMR sites, the allied health professional first applies via the Clinical Information Systems Support Unit (CISSU) using the AUSLAB/AUSCARE clinical and scientific information system Allied Health Professional access and configuration request. The form is to be signed by the supervising medical officer who authorises the allied health professional to order and sign-off the pathology tests. CISSU will notify the applicant of their log-in and password details via email.

Pathology results can be viewed through either AUSLAB or AUSCARE.
2.3 Pathology requesting access for allied health professionals: ieMR sites

In addition to completing the AUSLAB/AUSCARE clinical and scientific information system Allied Health Professional access and configuration request required by CISSU, the Physician Indicator role needs to be activated to enable the allied health professional to sign and enter the Pathology Order as the requesting clinician in ieMR. Physician Indicator access is requested via the Online Provisioning System with approval from the allied health professional’s authorising manager.

All results will be automatically sent from AUSLAB to ieMR. As the requesting clinician, the allied health professional will receive a message in their Message Centre when the pathology results are ready for review. The results are displayed under ‘results’ in ieMR or can be accessed via The Viewer.

NB: Pathology results are only visible in the Message Centre of the requesting clinician – i.e. the allied health professional will only see results for clients for whom they have placed Orders.

3. Clinical Governance

Appropriate clinical governance arrangements need to be in place for allied health professionals to request pathology tests and view/action results to maintain the highest levels of patient safety, quality and prudent use of laboratory services. Clinical governance will be assured through processes including use of Pathology Queensland protocols, ongoing supervision and quality assurance processes.

3.1 Agreement

Each allied health professional or group of allied health professionals must complete an agreement for pathology requesting by allied health professionals (Appendix 2) which details the clinical governance arrangements.

The Agreement specifies and documents the:

1. The allied health professional, or group of allied health professionals, covered by the individual agreement who will request pathology tests for particular patient groups.
   The pathology ordered should reflect the scope of practice of the allied health professional/s.
   Where more than one allied health professional within the same service will be requesting pathology results for the same patient group, the group of allied health professionals can be included in one agreement. However, each allied health professional must sign the agreement.

2. Agreed responsibilities of the allied health professional/s and supervising medical officer to ensure the action and escalation of pathology results occurs within a clinically appropriate timeframe.
The supervising medical officer has overall accountability for the patient’s care. The allied health professional, however, is responsible for reviewing and actioning the results of the requested pathology. Where the action required is outside their scope of practice, the allied health professional is responsible for ensuring the results are escalated to the supervising medical officer (or treating medical team) for review and action within a clinically appropriate timeframe.

3. Supervision arrangements between the nominated allied health professional/s and supervising medical officer, as appropriate to the clinical need/experience.

4. Schedule of review for this agreement including any quality assurance processes such as clinical audits as appropriate to service need and experience.

At non-ieMR sites, a clinical audit can be organised by the allied health professional and reviewed by the medical officer on an agreed regular basis. See Appendix 3 for a suggested clinical audit template. Data required for clinical audits can be accessed by the authorising medical officer or by using the AUSLAB/AUSCARE Data Request Form.

For ieMR sites, pathology activity data is captured by Cerner including: who has ordered pathology tests; the tests requested; and when results are endorsed. Reports can be generated to obtain this information including Orders by Orderer and Endorsed and Unendorsed Results. In some HHS’s, this information may be available to professional leads in a Results Endorsement Dashboard. In sites where a dashboard is not available, HHS’s may use their integrated services to build a report or engage with e-health Queensland.

A record of the Agreement should be kept in line with the record management policy of the HHS.

4. Training

Training supports upskilling and aims to build confidence to order pathology tests and in the synthesis and interpretation of clinical and investigative findings leading to diagnosis and differential diagnosis. Training is not a pre-requisite or required for allied health professionals to order pathology tests.

An online training package, Pathology for Allied Health Professionals is available through iLearn. The course includes:

- key pathology tests applicable to areas of practice
- process of pathology testing: pre-analytical, analytical, post-analytical
- choice of pathology test/s for the clinical problems commonly encountered
- interpreting pathology results to facilitate management of the clinical problems commonly encountered
- integrating pathology results into clinical practice.
For additional support:

- ieMR training and support is provided at a local level
- the Pathology Queensland AUSCARE intranet site provides additional resources, support and contact information.

5. Appendices

Appendix 1  Overarching Protocol
Appendix 2  Agreement
Appendix 3  Sample Clinical Audit Template
Appendix 4  ieMR Considerations
5.1 Appendix 1: Overarching Protocol

Pathology Queensland specific protocol for pathology requests by allied health professionals: Overarching Protocol

CONTEXT
The ability to request pathology tests is consistent with the assessment and clinical reasoning functions of first contact practitioners.

This overarching protocol provides the minimum clinical governance arrangements to support the requesting of pathology tests by allied health professionals. Requesting by allied health professionals will occur in collaboration with a supervising medical officer to enable the delivery of quality health services within a team environment.

RATIONALE
Allied health pathology requesting can contribute to:
- reduced delays in appropriate client management
- enhanced patient flow and improved continuity and coordination of care
- standardisation of patient care within an appropriate clinical governance framework
- increased patient satisfaction
- reduced number of unnecessary pathology tests with a subsequent reduction in pathology costs
- reduced high workloads of some medical and nursing staff
- improved interprofessional relationships.

PROCESS
Under the conditions outlined below, patients may have their pathology tests requested by an authorised allied health professional.

Pathology requisitions are submitted using handwritten order forms or electronically in the integrated electronic medical record (ieMR). Regardless of the mode of submission, allied health professionals requesting pathology tests will comply with the following:
- work within their scope of practice
- have an agreement with a supervising medical officer detailing the clinical governance arrangements for the requesting of tests and actioning of results
- request pathology only on PUBLIC patients (inpatient and outpatient)
- undertake a positive patient identification process
- complete and sign the Pathology Request Form in accordance with Pathology Queensland instructions or sign and enter the Pathology Order in ieMR

Queensland Government
• review and action the results of requested pathology including escalation of results to supervising medical officer where required.

The supervising medical officer has overall accountability for the patient’s care. The allied health professional, however, is responsible for reviewing and actioning the results of the requested pathology or where the action is outside their scope of practice is responsible for ensuring that the results are escalated to the supervising medical officer (or treating medical team) for review and action in accordance with the agreement.

CLINICAL GOVERNANCE

An agreement will document the clinical governance arrangements for the requesting of pathology tests by the allied health professional.

The agreement will:

• detail the patient group/s the allied health professional will request tests for
• outline the agreed responsibilities that the allied health professional will take to action and escalate pathology results
• detail the supervision arrangements between the allied health professional and supervising medical officer
• detail the schedule of regular clinical audits organised by the allied health professional for review by the supervising medical officer
• include signatures from both the allied health professional/s and supervising medical officer.

APPROVAL

DATE:  30/06/18

[Signature]

Dr Mark Waters
Executive Director Medical Services
Pathology Queensland
5.2 Appendix 2: Agreement

Agreement for pathology requesting by allied health professionals

Purpose

In accordance with the Pathology Queensland specific protocol for pathology requests by allied health professionals: Overarching Protocol, this agreement details the clinical governance arrangements required for the requesting of pathology tests and actioning of results by the nominated allied health professional(s).

Scope

This agreement applies to:

<name of allied health professional> or <group of allied health professionals>

who will request pathology tests for patients within

<enter patient group>, <name of service or facility>

Context

Allied health professionals require access to a wide range of clinical information to facilitate clinical reasoning and support the formulation of a differential diagnosis. Requesting by allied health professionals will occur in collaboration with a supervising medical officer to enable the delivery of quality health services within a team environment.

Conditions

The allied health professional(s) requesting pathology tests will comply with the following conditions as agreed by Pathology Queensland:

- have organisational approval to request pathology
- work within their scope of practice
- request pathology only on PUBLIC patients (inpatient or outpatient)
- undertake a positive patient identification process
- complete and sign the Pathology Request Form in accordance with Pathology Queensland instructions or sign and enter the Pathology Order in the integrated electronic medical record (eMR)
- review and action the results of requested pathology, including escalation of results as detailed below.
**Clinical governance arrangements**

1. Outline the agreed responsibilities that the allied health professional/s and supervising medical officer will take to ensure the action and escalation of pathology results occurs within a clinically appropriate timeframe:
   - [<detail responsibilities to action results>](#)
   - [<detail responsibilities to escalate results>](#)

2. Detail the supervision arrangements between the nominated allied health professional/s and supervising medical officer, as appropriate to the clinical need/experience:

3. Detail the schedule of review for this agreement including any quality assurance processes such as clinical audits as appropriate to service need and individual experience:
   - [<enter date/s>](#)

**Supervision Agreement**

**Allied health professional/s (add additional lines to reflect all allied health professionals covered by this agreement)**

| Name: |  |
| Profession: |  |
| Signature: |  |
| Date: |  |

| Name: |  |
| Profession: |  |
| Signature: |  |
| Date: |  |

<add additional lines to reflect all allied health professionals covered by this agreement>

**Supervising medical officer**

| Name: |  |
| Signature: |  |
| Date: |  |
### 5.3 Appendix 3: Sample clinical audit template

#### Clinical audit for allied health pathology requesting

<table>
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<th>Requested form completed fully and accurately</th>
<th>Requested tests clearly identified</th>
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Name: _________________________  Facility: ___________________________  Date: ______________
5.4 Appendix 4: ieMR Considerations

There are a number of considerations HHSs may like to be aware of when implementing pathology requesting for allied health professionals at ieMR sites:

- The Guideline for allied health professionals requesting pathology tests supports allied health professionals as the requesting clinician in ieMR. Allied health professionals can also request pathology results on behalf of a medical officer e.g. Allied Health Initiated (no co-sign) or Co-sign required.

- Quick reference guides are available on the Metro South HHS intranet site, including a pathology requesting quick reference guide

- Pathology test names in the ieMR are more specific and may be different to those used when ordering in paper format.

- It is possible to set up a ‘favourites’ list of tests within the ieMR. ‘Favourite’ tests can be bundled.

- A pathology request must be entered against an encounter e.g. an outpatient appointment, chart review, phone review or inpatient admission. If an encounter does not exist, a pathology test cannot be requested.

- The encounter chosen must correlate with the requesting clinician.

- HHS pay for pathology tests. The payment class is selected as ‘other’ and chargeable status ‘public’.

- The pathology test will only be ordered when the status is changed from ‘processing’ to ‘ordered’. For this to happen, the screen may need to be manually refreshed using the refresh icon.