

Northwell Health Laboratories

450 Lakeville Rd.
Lake Success, NY 11042

SYS-4227 Upcoming Surgical Procedure Preparation

Copy of version 2.0 (approved and current)

Last Approval or
Periodic Review Completed 10/1/2025

Next Periodic Review
Needed On or Before 10/1/2026

Effective Date 10/1/2025

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Printed By James Martone (101166)

Organization Northwell Health Laboratories -
Enterprise

Description

Updated title to match policy (Surgery to Surgical)

Comments for version 2.0

Changes to improve readable and workflow for OR and Blood Bank

Approval and Periodic Review Signatures

Type	Description	Date	Version	Performed By	Notes
Approval	Lab Director	10/1/2025	2.0	<i>Dwayne Breining, MD</i> Dwayne Breining Medical Director (130591)	
Approval	CQ Holder Approval	9/30/2025	2.0	<i>Alexander J. Indrikovs, MD</i> Alexander J Indrikovs	
Approval	AVP Approval	9/25/2025	2.0	<i>James Martone</i> James Martone (101166)	
Approval	Author Approval	9/25/2025	2.0	<i>James Martone</i> James Martone (101166)	
Approval	Lab Director	3/18/2025	1.0	<i>Dwayne Breining, MD</i> Dwayne Breining Medical Director (130591)	
Approval	CQ Holder Approval	3/12/2025	1.0	<i>Alexander J. Indrikovs, MD</i>	

Approval AVP
Approval 3/12/2025 1.0

James Martone
James Martone (101166)

This policy officially will go into effect when the facility implements Epic during the phasing in of Northwell Blood Bank laboratories.

Approval Author
Approval 3/6/2025 1.0

Seeromanie Prashad
Seeromanie Prashad (166245)

Version History

Version	Status	Type	Date Added	Date Effective	Date Retired
2.0	Approved and Current	Major revision	9/25/2025	10/1/2025	Indefinite
1.0	Retired	Initial version	3/4/2025	3/25/2025	10/1/2025

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Upcoming Surgical Procedure Preparation

PURPOSE:

This procedure outlines the steps for generating and reviewing the Epic upcoming surgical procedure report, in accordance with the Maximum Surgical Blood Order Schedule (MSBOS), to facilitate the preparation of blood and blood components for patients scheduled for surgery.

POLICY:

Using the Upcoming OR Procedure and Blood Needs report, a review and confirmation process will be implemented to verify blood availability for patients scheduled for surgery the following day,. This information will be provided by the Blood Bank to the OR the day before the surgery, indicating blood and patient specimen Availability and RBC antibody status. If blood is unavailable, the report will specify the specimen status and requirements, enabling necessary sample ordering and collection. The blood bank will maintain an up-to-date list of all patients scheduled for procedures in all operating rooms.

PROCEDURE / RESPONSIBLE:

1. The blood bank technologist will access and print the upcoming surgical procedure report in Epic for review of blood and patient specimen_availability at 3 pm daily. The Blood Bank staff will use the laboratory information system to perform a look up by accessing the patient's transfusion history by specific medical record number and name search to check if blood and or patient specimen is available.
2. The Upcoming OR Procedure and Blood Needs Report is reviewed by specialty in accordance with the (MSBOS) and blood bank technologist, and indicate on the Upcoming OR Procedure and Blood Needs Report the following status requirements for the procedure:
 - a. Type and Screen (TS), when required.
 - b. Confirm Type (CT), when required.
 - c. Historical blood type, when available.
 - d. Number of blood products prepared as per the MSBOS.

Note: If the blood type is manually recorded in the T&S field and there are no indications for an additional specimen, blood will be prepared and made available according to the MSBOS.

3. When reviewing patient history in blood bank laboratory information system use name, medical record number (MRN), financial information number (FIN) and DOB as positive patient identifiers when performing a search.
4. Compare all patient's demographics on the Upcoming OR Procedure and Blood Needs Report (Patient's full name, DOB, and MRN when available) to the blood bank LIS. ***Any discrepancy must be investigated.***
5. If patient has an active type and screen and ABO confirm, record the blood type and Rh result.
6. If patient requires ABO confirm, check that specific column.
7. If patient has no record of specimen, check that specific column.
8. If patient's history indicates atypical antibody(ies), check that specific column.
9. If the patient is computer crossmatch eligible, record "Yes" in the on-demand blood column.

Upcoming Surgical Procedure Preparation

10. Blood bank technologist must indicate on the Upcoming OR Procedure and Blood Needs Report and notify the clinical team if a sample(s) is needed for an In-house patient prior to surgery. The Blood Bank will notify the SDA/PST area when a Type & Screen (T&S) or ABO confirmation is needed, ensuring the specimen can be drawn upon the patient's arrival, prior to surgery. Document on the Upcoming OR Procedure and Blood Needs Report the name of the person notified.
11. Blood Bank technologist reviewing Upcoming OR Procedure and Blood Needs Report must enter their name initials on the bottom of the Upcoming OR Procedure and Blood Needs Report when review is completed.
12. Upcoming OR Procedure and Blood Needs Report is then reviewed by blood bank supervisor or designee for completeness and accuracy. Supervisor or designee must enter their name initials on the bottom of the Upcoming OR Procedure and Blood Needs Report when review is completed.
13. Upon completion, the final Upcoming OR Procedure and Blood Needs report will then be distributed to all appropriate hospital areas, including OR, PST, ASU, and the Blood Bank.
14. Subsequent changes or updates in patient Blood Bank status are written on the ***final*** copy and faxed to the OR by the end of the day.
15. The final Upcoming OR Procedure and Blood Needs Report is posted in the Blood Bank visible for staff use.
16. Previous days' Upcoming OR Procedure and Blood Needs Reports are filed in a binder in date order and kept for one year in the Blood Bank.

PROCEDURAL NOTES:

1. Type and Screen sample must be reviewed to ensure sample is valid for date of procedure. If pre-surgical sample expiration date is incorrect, you must verify and update expiration date accordingly. Refer to Blood Bank Specimen Accessioning SOP.
2. When reviewing Upcoming OR Procedure and Blood Needs Report, review must include all documented information that will aid in providing the appropriate blood products required (e.g., Preop Diagnosis, Patient on Anti-Platelet medication, clotting factor requirements, etc.).
3. Patients with current or historical antibody(ies) must have double the number of RBC units prepared as per the MSBOS (e.g., TS procedure will require a minimum of 2 units of RBC prepared, or MSBOS procedure requiring 2 units will need 4 units of RBC, etc.).
4. If a patient's clinical needs require additional blood components beyond the system-approved MSBOS guidelines, the case will be discussed with Blood Bank leadership and/or the Medical Director.
5. For patients with a directed donated unit, affix a "Directed Donation" sticker to the Upcoming OR Procedure and Blood Needs Report. Like wise, for patient's with an autologous unit, place the "Autologous Blood" sticker adjacent to that patient's name.
6. The 2,4,6-unit requirement is determined by integration of the Northwell MSBOS and the Epic software functionality.
7. Providers will place orders in Epic for the required products based on system approved MSBOS and/or determined patient's clinical needs.
8. After 3:00 p.m. (when the Blood Bank generates the final report), procedure cancellations and/or add-on cases , will be communicated to the Blood Bank.

Upcoming Surgical Procedure Preparation

Example of Epic Screen.....THIS REPORT HAS NO DOB ON IT??

Upcoming OR Procedures and Blood Needs [4490095] as of Mon 7/28/2025 3:37 PM

Open Chart

Detail ListExplore

Filter

Service	Location	Lead Surgeon	Patient Class	Date	Patient Name	T&S Available Bld Type	2nd specimen needed	No specimen	Atypical antibody	2 Units of RBC	4 Units of RBC	6 Units of RBC	# Units Xm / Bld Avail On demand (Yes)	Blood Orders to Prepare	Case Procedures
Cardiothoraci...	LHH OR	Physician Surgery, Md	Surgery Admit	07/29/2025	Money Penny, Miss [10139465]					✗	✗	✗			Coronary Artery Bypass Grafting (CABG) [1079900159]
Cardiothoraci...	LHH OR	Omar Ali Jarra, Md	Surgery Admit	07/29/2025	Orders, Batman [10100046]					✗	✗	ⓘ			Transplant - Heart [1078002626] 1 This patient has blood ordered on the inpatient admission which are not linked to the scheduled case procedure
Cardiothoraci...	LHH OR	Physician Surgery, Md	Surgery Admit	07/29/2025	McFly Demo, Marty [10116360]					✗	✗	✗			Thoracoscopy (VATS) - Lung Biopsy [1079902194] 2 This patient does not have any blood orders and the scheduled case procedure does not have any suggested MSBOS blood to order
General Surg...	LHH OR	Physician Surgery, Md	Surgery Admit	07/29/2025	House, Gregory [10139720]					✗	ⓘ	✗		Prepare RBC Leukoreduced 6 Units Other, Reason for transfusion does not fall within Northwell evidence-based indications yet I want to proceed with this order.; Hold for OR; 2 Hours	Colostomy - Creation - Open [1079901084]
Obstetrics	LHH OR	Physician Surgery, Md	Surgery Admit	07/29/2025	Ventura, Ace [10108754]					✗	ⓘ	✗			CESAREAN DELIVERY ONLY [1078004919] 3 This patient does not have any blood orders and the scheduled case has suggested MSBOS blood to order (4 units)
Obstetrics	LHH OR	Physician Surgery, Md	Surgery Admit	07/29/2025	McFly Demo, Lorraine [10116384]					✗	ⓘ	✗		Prepare RBC Leukoreduced 4 Units Other, Reason for transfusion does not fall within Northwell evidence-based indications yet I want to proceed with this order.; Hold for OR; 1 Hour	CESAREAN DELIVERY ONLY [1078004919] 4 This patient has a pre-procedure blood order for 4 units which matches the MSBOS suggested blood order. This order is linked to the scheduled case procedure.

Example of Blood Bank PDF Report.. So in this above report what triggers the blk/whit circle icon.. one say linked and other says not linked that have that icon??

Upcoming Surgical Procedure Preparation

Upcoming OR Procedures and Blood Needs
Run by KWAN, REGINA [856]

NORTHWELL SERVICE AREA

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Service	Date	Patient Name	T&S	2nd ABO spec	No ABID	2 Units	4 Units	6 Units	# Avail	Blood Orders to Prepare	Case Procedures
Location	Patient Class					RBC	RBC	RBC			
LHH OR											
General Surgery LHH OR Physician Surgery, Md	07/29/2025 Surgery Admit	House, Gregory [10139720]				N/A	Star ted	N/A		Prepare RBC Leukoreduced: 6 Units Other; Reason for transfusion does not fall within Northwell evidence-based indications yet I want to proceed with this order.; Hold for OR; 2 Hours	Colostomy - Creation - Open [1079901084]
Obstetrics LHH OR Physician Surgery, Md	07/29/2025 Surgery Admit	McFly Demo, Lorraine [10116384]				N/A	Star ted	N/A		Prepare RBC Leukoreduced: 4 Units Other; Reason for transfusion does not fall within Northwell evidence-based indications yet I want to proceed with this order.; Hold for OR; 1 Hour	CESAREAN DELIVERY ONLY [1078004919]
Cardiothoracic Surgery LHH OR Physician Surgery, Md	07/29/2025 Surgery Admit	McFly Demo, Marty [10116360]				N/A	N/A	N/A			Thoracoscopy (VATS) - Lung Biopsy [1079902194]
Cardiothoracic Surgery LHH OR Physician Surgery, Md	07/29/2025 Surgery Admit	Moneypenny, Miss [10139465]				N/A	N/A	N/A			Coronary Artery Bypass Grafting (CABG) [1079900159]
Cardiothoracic Surgery LHH OR Omar Ali Jarra, Md	07/29/2025 Surgery Admit	Orders, Batman [10100046]				N/A	N/A	Star ted			Transplant - Heart [1078002826]
Obstetrics LHH OR Physician Surgery, Md	07/29/2025 Surgery Admit	Ventura, Ace [10108754]				N/A	Not Star ted	N/A			CESAREAN DELIVERY ONLY [1078004919]
Count for LHH OR : 6											

Search Summary

Find Surgical Cases

Where all of the following are true:

Surgery date where all of the following are true: on or after 7/29/2025 (T+1), on or before 7/29/2025 (T+1)

Scheduling statuses is Scheduled [1]

Is surgery in user login hospital? is Yes [1]

Description and intent of column headers on Upcoming OR Procedure and Blood Needs (visible when hovered over column)

Type & Screen Available Blood Type The ABO Rh will be displayed indicating the Blood Bank has an active specimen to be used to prepare and release blood if required.

2nd specimen needed ☒ Confirmation ABO specimen required for blood setup and release.

No specimen ☒ No active Type and Screen present. If patient procedure /clinical condition requires blood, a Type and Screen must be ordered and received for testing.

Atypical antibodies ☒ Patient has active or historical positive antibody screen to which RBC antibody(ies) have been identified. A minimum of 2 units will be available, or Blood Bank will crossmatch 2 times the MSBOS requirement .

Units Xm / Bld Avail On demand (Yes) The number of units crossmatched will be displayed equaling or exceeding MSBOS requirement or “Yes” for patients eligible for computer crossmatch for requesting of on-demand blood releasing.

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2/4/6 Units of RBC

The number of units are based on the system-approved MSBOS. The PDF report will indicate “started” or “not started” to reflect units required and status of provider orders.

Blood Orders to prepare

The provider’s orders for blood preparation will display on the report if completed by 3:00 p.m. The perioperative status board will display the status of provider orders (see attachment #1)

T&S Available Bld Type	2nd specimer needed	No specimer	Atypical antibody	2 Units of RBC	4 Units of RBC	6 Units of RBC	# Units Xm / Bld Avail On demand (Yes)	Blood Orders to Prepare
								

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Attachment #1

The icons for both signed/held orders and orders requiring acknowledgment will disappear once addressed by the nurse. After lab collection, the microscope icon will change to a green checkmark.

OR 06

Optime,
Matthew
[10100433]

Appendectomy - Open

41 yrs M 1545 - 1625

09/29/83 No/English LHH OR

Optime,
Generic
Surgeon



Signed and held orders for this patient



There are orders to be acknowledged



Labs Need Collection

The icon for both Signed and Held and Orders to be Acknowledged will disappear after they are addressed by the nurse. For the lab that is already collected, the Microscope icon will change to a green check mark.

Anesthesia, Fiona [10100631]	Lithotripsy - Extracorporeal Shock Wave (Eswl) W Stent, Cystoscopy	56 yrs F 10/18/68 No/English	2205 - 2235 NSUH OR Bharam, Srino	Gen		
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Labs Collected

Upcoming Surgical Procedure Preparation

REFERENCES

Regulatory agencies: CAP, NYSDOH, aabb, FDA

RELATED DOCUMENTS

Upcoming OR Procedure and Blood Needs Report
Northwell Maximum Surgical Blood Order Schedule

DISTRIBUTION LIST

Department requiring information

REVISION/VERSION HISTORY

Version No.	Date	Additions/Amendments
1	03/01/2025	Original
2	9/3/2025	Updated with Epic Upcoming OR Procedure and Blood Needs Report Revised workflow to include blood orders and communication/distribution