Collection Checklist (Partner Method)
Collection & Transport of Specimens Suspected To Contain Special Pathogens

*This document is designed to be an example template. Exercise the process and make changes to this document to reflect what works best for your facility. Add detail and/or change the wording to more accurately describe the step-by-step tasks needed to collect specimens in your isolation area. Make it specific for your facility before implementing in your facility’s protocol.*

Prior to collecting specimens for testing at your designated Public Health Laboratory, contact the appropriate persons. Ensure that you have the appropriate permission as well as collection, packaging and shipping information BEFORE starting the collection process. Notification protocols may vary from state to state, but may include the following:

- **Local Health Department 24/7/365 contact number:**
  __________________

- **DHHS Office of Epidemiology:**
  _______________________________

- **Public Health Lab 24/7 emergency number:**
  _______________________________

*Work together with your Public Health Department to determine the appropriate notification protocol for your facility.*

**PRIOR TO COLLECTION (Cold Zone):**

Gather and organize supplies to take into PUI isolation area (hot zone):

- **Appropriate specimen container(s)**
  
  *Note: Consult with public health laboratory if collecting screening specimens*

- **Appropriate collection supplies such as:**
  - **Collection device**
    - For blood collection - IV kit, vacutainer adapter system with safety lock, needle or syringe and needle with transfer device, vacutainer tubes
    - For Respiratory - Nasopharyngeal Swab
    - Other?
  - **Collection prep supplies i.e.) alcohol pads, iodine preps, cotton balls, Band-Aids**
  - **Tourniquet**
  - **Disinfectant wipes**
Tasks performed in isolation area (hot zone):

Work slowly, methodically, be aware of possible contamination. If a breach is observed, STOP critically think through the situation.

**HCW#1 (HEALTH CARE WORKER) – COLLECT SPECIMEN(S)**

**TO#2 (TRAINED OBSERVER) - READ STEP-BY-STEP CHECKLIST**

- Pre-position supplies on tray/table, adjacent to patient arm used to collect blood.
- Logistically place supplies; work from clean to dirty side with medical waste container nearby.
- Set out several disinfectant wipes and remove gloves from box for easy access.
- Prep patient according to specimen type required, (blood, respiratory, etc.)
- **HCW#1** collects appropriate specimen(s), in specific order: Clear, Blue, Red, Gold, Green, Purple Grey top. Mix well, place on clean disinfectant wipe.

**CHANGE OUTER GLOVES USING GOOD GLOVE-IN-GLOVE TECHNIQUE** put on new outer gloves or hand sanitize.
- With new wipe, pick up top of tube.
- Pick up 2\(^{nd}\) wipe, and clean bottom of tube with good friction
- Holding the bottom of tube with the wipe, use the other hand to wipe the TOP of vacutainer lid (thoroughly remove blood droplets from indent of rubber stopper).
- Lay specimen container down on new disinfectant wipe to dry, discard used wipes.
- Repeat disinfection step with each tube or device collected, using new wipes,
✓ Let each tube or container dry during next glove change.

✓ **CHANGE OUTER GLOVES USING GOOD GLOVE-IN-GLOVE TECHNIQUE**, put on new outer gloves or hand sanitize.

✓ Place pre-printed label on specimen(s) or manually write with two (2) identifiers.

✓ Write initials, date and time on each specimen collected on label with ink pen.

✓ Trained observer #2 hold SMALL biohazard bag open, touching only side (do not hold top).

✓ **HCW #1** with new wipe, pick up and place only one specimen into SMALL bag containing adsorbent material, **Avoid touching gloves to the sides of the bag**. Discard used wipe.

✓ **TO#2** will place the SMALL biohazard bag flat on sterile wipe or pad.

✓ **HCW #1**: Take new wipe in each hand, thoroughly clean outside of bag on both sides, work tube to bottom. Clean from bottom to top.

✓ Fold bag over several times to expel air, and rub seal closed.

✓ Multiple specimens - Repeat same method above, placing each additional specimen into separate SMALL bag (including short draws - Do NOT discard or store). Fold, seal and place on clean wipe.

✓ **TO#2** hold LARGE biohazard bag open at side.

✓ Lead Partner #1 with new wipe, pick up and place SMALL folded bag(s) into LARGE bag.

✓ **TO#2**: place ARGE bag flat on new adsorbent pad.

✓ When all specimens are in larger bag, Lead Partner #1: take new wipes in each hand, rub outside of the bag on both sides, work specimen(s) to bottom if possible. Fold the bag several times to expel air, rub seal shut.

✓ **HCW #1**: **CHANGE OUTER GLOVES USING GOOD GLOVE-IN-GLOVE TECHNIQUE**, put on new outer gloves or hand sanitize.

✓ **HCW #1**: Using new wipe between fingertips and bag, carefully hand off larger bag to clean side, placing directly into white Tyvek™ envelope without touching envelope. (Fig 1).

✓ Document number and types of specimens collected, notify the onsite manager or lead nurse on clean side when the specimens are ready.

![Figure 1](image-url)
Final packaging performed in Clean Zone:
Personnel designated to accept specimens on clean side near isolation room can wear routine lab coat and gloves. (*Follow your facility’s PPE protocol)

Final packaging of specimen is determined by the final destination:

I. Onsite Laboratory - Use rigid container to transport through patient or public areas of same facility. Specimens MUST be triple packaged, with primary specimen containers double bagged, then securely placed in rigid outer container to transport to the onsite laboratory.
   Note: Consider keeping a log of the number and type of specimen being transported. Consider security or second person to assist in transport of specimens.

II. Commercial Courier – Person packaging and shipping MUST be DOT certified within 2 yrs
   - Commercial Ground courier – PHL might be able to provide guidance to appropriate couriers. (Couriers must be vetted and meet specific requirements to ship Category A) Shipper Declaration required. Only use UN specified Category A shipping box.
     Note: Consider a chain of custody document to accompany specimens to destination.
   - FedEx – Airbill, Shipper Declaration required.

III. Government Courier – Use only in emergency situations, such as when shipper is not DOT certified. DHHS must approve.