Optimizing Biospecimen Workflows: Streamlining Clinical Trial Blood Collection Through a Novel Integration of Enterprise I.T. Systems

K. Weren, J. Salcedo, S. Ferreira, A. Haegler, E. Waalkes, N. Chowdhury, A. Joshi, B. Pothuri

Laura & Isaac Perlmutter Cancer Center at NYU Langone Health

1. Background
The Research Biofluid Management Unit (RBMU) of the Clinical Trials Office (CTO) at NYU Langone Health (NYULH) Perlmutter Cancer Center (PCC) is responsible for clinical trial biofluid collection in collaboration with the CTO clinical coordination unit (CCU). Before 2022, CCU staff emailed requests for blood collections to RBMU as an Excel attachment “research ticket,” prompting RBMU to deliver a patient- and visit-specific blood kit to the clinic. One research ticket was completed for each timepoint and included redundant or erroneous patient demographics, appointment, and specimen information. RBMU received hundreds of emailed tickets that frequently required revision due to schedule add-ons, typos, or errors. The email ticket system required CCU staff to monitor Epic electronic medical records (EMR) for schedule changes. Errors in tickets and add-ons resulted in missed or erroneous collections, delays in lab and clinical workflows, and longer wait times for patients on research studies. A more sophisticated and automated system was needed.

2. Goals
We aimed to replace the existing research ticket email workflow with an integration between enterprise laboratory information management system (LIMS) LabVantage and Epic EMR. The new request system would reduce human error and last-minute requests by automating patient demographics and real-time appointment updates from Epic to LabVantage, ultimately streamlining kit delivery, blood collection, and downstream sample processing.

3. Solutions and Methods
In 2018, a clinical trial management project began development with LIMS LabVantage and Epic EMR integration and enhancement. Project requirements included:

- Capture study information in LabVantage via integration with enterprise clinical research management system (CRMS)
- Automatically enroll participants in LabVantage studies based on CRMS and Epic enrollment
- Build clinical protocols in LabVantage outlining specimen collection schedules
- Create a new “research blood draw” order in Epic that staff can link to patients’ lab or infusion appointments
- Develop a scheduling integration to show research-specific Epic appointments within LabVantage
- Build a platform in LabVantage for CCU staff to request appointment-specific blood kits
- Create a calendar to track expected samples with real-time automatic Epic appointment updates based on visit check-ins, completions, rescheduling, cancelations, and no-shows
- Train faculty group practice schedulers, phlebotomists, infusion nurses, and research staff

4. Outcomes
In July 2022, the Epic-LabVantage integration replaced the email-Excel research ticket for PCC outpatient blood collections in Manhattan. Currently, 90 percent of all clinical trial blood specimens are collected using this system. Over 200 NYULH personnel were trained on new workflows in Epic and LabVantage.
The integration eliminated the risk of inaccurate patient demographics in specimen requests by replacing Excel and email with information automatically pulled from patients’ charts. Automatic Epic appointment updates decreased the occurrence of last-minute kit requests by 50 percent and eliminated the risk for missed visits caused by unsent Excel tickets. Since implementation, the Epic-LabVantage integration has facilitated 13,000 specimen collections for 250 clinical trials with Epic research blood draw orders.

5. Lessons Learned and Future Directions
Integrating NYULH Epic EMR with LIMS LabVantage streamlined clinical trial specimen management for clinical and laboratory staff. Accurate patient demographics and real-time automated updates to the specimen calendar reduced errors on requisition forms, missed or incorrect specimen collections, and delays in sample collection and processing downstream. Next steps include expanding the Epic-LabVantage integration to include blood and tissue collections at inpatient sites and NYULH PCC Long Island and Brooklyn locations.
Figure

Images:

(BEFORE) Excel Document Research Ticket (printed):

(AFTER) LabVantage Request Platform with Epic appointment integration: