

Re-Print: Importance of Quality in the pre-Analytical Phase

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Received Date: **January 03, 2024** | Accepted Date: **January 26, 2024** | Published Date: **February 02, 2024**

Citation: Karen C. Barbeiro (2024), *Re-Print: Importance of Quality in the pre-Analytical Phase*, *Journal of Clinical and Laboratory Research*. 7(2); DOI:10.31579/2768-0487/120

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Abstract

The laboratory examinations in the diagnostic medicine assist doctors in clinical decisions, discoveries of diseases and, finally, in verifying the evolution of the patient in the face of treatments, being the responsibility of the laboratory, the performance and delivery of the result in a precise and reliable way. For this, we divided the analysis into three phases: pre-analytical phase encompassing the choice of the exam by the doctor, until the transport of the sample to the analysis site, the analytical phase where the analysis takes place and finally, the post-analytical phase where it is released and interpreted the results. The pre-analytical phase is the least automated and has the participation of the largest number of professionals from different areas, so the possibility of errors is greater, impairing the quality of the sample and interfering with the results of the exams, causing a great impact on the patient's life. This study aims to inform health professionals about the importance of a well-executed pre-analytical phase, preventing future errors.

Key words: pre-analytical phase; quality control; clinical laboratory techniques

Introduction

Diagnostic medicine laboratories play an important role in medical decisions for patients. It is therefore important to establish trust and confidence in laboratory reports. In order to reduce errors and increase the safety and reliability of pre-analytical processes, a series of activities are required aimed at the continuing education of professionals involved in the processes of obtaining and handling biological samples. Diagnostic medicine services are therefore required to take responsibility for all laboratory tests and seek to reduce errors. (1)

There are four reasons for requesting a laboratory test: diagnostic support; monitoring (e.g. drug effect); screening and research (understanding the disease). As a result, the number of laboratory tests available to doctor has grown since 1920, when Folin and Wu used the first serum glucose quantification test. The current list of tests offered by a large laboratory exceeds 3,000 analytes. (2) A test is appropriate when it is effective, properly indicated, inexpensive and available to the population.

When requesting a test, the cost/benefit ratio is a factor to be considered, whether the test will be beneficial for diagnosis, prognosis or treatment. Otherwise, the test may be unnecessarily expensive and increase the risk of incorrect results, leading to new investigations and erroneous changes in therapy, delays in diagnosis or increased hospitalization. (3) The correct and routine training of the professionals who collect the diagnostic blood specimen (arterial, venous and/or capillary blood), with regard to the correct posture of the patient, the time of collection, the time the tourniquet is applied, the inappropriate procedure for constricting the forearm muscle and the correct sequence of tubes in vacuum system collections, are essential conditions for the quality

of the result. (4) To maintain this quality, we also divide laboratory procedures into three distinct phases: pre-analytical, analytical and post-analytical. Of all the phases, the pre-analytical phase has the highest number of recorded errors, and is therefore the one most depreciated by the public health professionals. (5)

It's important to note that early detection of errors will prevent biological samples from being re-collected and additional costs due to repeat analyses, which, in addition to compromising the reputation of laboratories, can appear to be an inefficiency in the quality of the service provided. (6) Other reasons for the reason for the high failure rates in this laboratory stage is the low level of automation, the difficulty in controlling the items in this stage, such as the information given by patients during questioning on the eve of the test, for example, omitting to check if they are fasting, have taken medication or exercised, which can compromise the quality of the test. Thus, the success of the pre-analytical phase depends not only on the health professional, but also on the patient's compliance. (7) Therefore, erroneous results can jeopardize the interpretation of a disease and the prescription of treatment. For this reason, External Quality Control in clinical laboratories aims to increase the quality of the services provided for the patient. (8) Finally, technological developments have been a driving force behind the implementation of quality concepts in clinical laboratories. However, the new practices cause an increase in the cost of laboratory processes and do not always keep pace with the growth in remuneration from paying sources. On the contrary, clinical laboratories, particularly in Brazil, have come under pressure from supplementary health service providers to reduce the costs of carrying out tests. (3) Medical services need reliable laboratory support to make appropriate decisions and formulate policies. The laboratory accreditation

system is necessary for the acceptance of test results at national and international level. This process has a positive impact on the image of the institution, giving reliability to the quality of the services, which translates into trust both for the professionals who are part of the institutions and for the clients and users of these services. (9)

Theoretical Framework

The clinical analysis laboratory

The clinical analysis laboratory assists in diagnostic and therapeutic choices by issuing reports, which are documents containing the results of laboratory analysis, validated by the technical manager. (10) It is therefore necessary to be assertive in the results issued, as these data influence the decision making of the requesting physicians and the diagnosis of patients. (1) In health care, services that assist in the medical management of patients' clinical situations are essential. In this context, clinical analysis laboratories are fundamental, as they contribute to health care and promotion through the operation of different sectors (hematology, biochemistry, immunology, etc.), bacteriology, parasitology and uroanalysis, among others) and, due to advances in automation, they can act in an interrelated way in the analysis of various biological samples (blood, urine, feces, cerebrospinal fluid, sputum, among others) and in the issuing of reports (biochemical, hematological, immunological, microbiological, uroanalysis) containing the patient's physiological state, in addition to issuing results quickly, precisely, accurately and reliably. Once they have been correctly interpreted by the doctor, they can prove, establish or add to a diagnosis that is consistent with the patient's clinical history. In this way, laboratory tests can influence approximately 70% of the medical decisions made about a patient. (6) In order to have a trustworthy organization, it is important to have control of all procedures, identifying faults and taking action to reduce their consequences. For this reason, it is important to constantly train staff, from reception to the release of the report, keeping them up to date, providing the Standard Operating Procedure (SOP) if there are any doubts during a procedure, identifying the causes of failures and intervening effectively before they reach the patient, causing inconvenience or compromising treatment or even inflicting any risk to their health. (8) It is worth noting that releasing an incorrect report can lead to an increase in medical consultations and laboratory and imaging tests, increasing the cost of health services. (3) Therefore, biosafety measures in laboratories aim to reduce or eliminate the risks inherent in the activities, with a view to the health of patients, preservation of the environment and the quality of results, and it is worth emphasizing that professionals must be aware of these measures and be trained and evaluated. Effective guidance procedures to promote standardization, harmonization, detection and the handling of samples by competent and well-trained personnel are essential to guarantee a result with the optimum degree of accuracy, precision and reliability provided by the laboratory. (8)

The analytical phases in the clinical analysis laboratory

Tests in the clinical analysis laboratory go through a series of phases, which are used to obtain a laboratory report that will help diagnose the patient and begin outside the laboratory. (1) The process that ends in the execution of a laboratory test begins with the clinical evaluation, where a diagnostic hypothesis is established and the tests are requested. The final process takes the form of the doctor using the information generated by the laboratory. (3) This cycle is made up of the following phases: pre-analytical, analytical and post-analytical, which are subject to various possible errors that affect the quality and reliability of the result. (2) The pre-analytical phase begins after the doctor has defined which tests to order, taking into account other tests, patient reports and anamnesis; it continues with preparation for collection, when it is important to provide guidance on medications to be used or avoided, hygiene care, diet, among others; after this stage, the collection, handling and storage of the specimen begins before analysis. (5) In the analytical phase, the sample is analyzed. This stage is the most automated and its control includes evaluating parameters such as precision, sensitivity,

specificity and accuracy, among others. When evaluating these indices, attention must be paid to the calibration of the equipment, the conservation of reagents and the use of mathematical calculations, such as the Levey-Jennings control chart, which analyzes the imprecision of a given analyte. (7) Finally, in the post-analytical phase, the test results are delivered in accordance with current legislation, taking into account legal aspects and subsequent analysis by the doctor, who will use the data provided as a reference to conclude the diagnosis and start the appropriate procedure. To this end, it is important that professionals in clinical analysis laboratories follow the recommendations in order to reduce errors that can occur during the three phases. They are also related to patient orientation for the collection procedure, the execution of the collected material and the evaluation of the agreement in the result, thus offering security in the medical diagnosis. Therefore, all the variables listed are subject to recurring errors in clinical analysis and must be assessed by professionals with professional responsibility and qualifications. It is not correct to say that errors only occur in the extra-analytical stage, because they involve people, and that machines don't make mistakes, but with the involvement of several team members, there is a risk of increasing the probability of failures. (5) In view of this, laboratories adopt various types of methodologies to ensure the credibility, precision and accuracy of the reports issued. This includes methods to reduce errors in the pre-analytical, analytical and post-analytical phases, internal and external quality control procedures, such as monitoring of the analyses carried out, laboratory accreditation and laboratory certification programs and patient information prior to the biological material. (6)

The pre-analytical phase

It is in the pre-analytical phase that a high number of errors occur in the analysis of biological samples, due to the difficulty in controlling pre-analytical variables, since this phase involves numerous non-automated activities such as sample collection, handling, transportation and preparation. (11) Studies indicate that approximately 40% to 70% of errors occur in the pre-analytical phase. (2) In Brazil, few laboratories have fully automated pre-analytical systems. (4)

In order to reduce error rates, it is important to instruct the patient on how to prepare when the tests are requested. According to the Brazilian Society of Clinical Pathology/Laboratory Medicine (SBPC/ML), the requesting doctor or their direct assistants should be responsible for first instructing the patient on the conditions for carrying out the test, informing them of any need for preparation, such as fasting, stopping the use of any medication, a specific diet, or even not carrying out any physical activity before the tests are collected. Before taking the samples, the phlebotomist must be aware of and observe relevant information about the patient, the so-called pre-analytical condition: gender, age, body position, physical activity, fasting, diet and the use of drugs for therapeutic purposes, smoking and alcohol consumption, as this data could compromise the accuracy of the results. (1) There are also variations in laboratory results that can be predicted by taking into account non-modifiable biological and circadian cycles. With knowledge of these biological cycles and rhythms, it is possible to choose the best time to collect the biological sample, in which the analyte of interest is within the expected clinical parameters. It is important to note that the majority of analytes of medical interest can undergo significant variations as a result of the habits that precede the collection of the biological sample, compromising the precision and accuracy of the analyses. It is possible to see that in the studies investigated, the biological parameters most susceptible to alterations are the dosages of glucose, cholesterol, triglycerides, enzymes and electrolytes. (6)

In order to carry out a collection in suitable conditions, the phlebotomist must be properly instructed and trained. They must also comply with biosafety regulations and written instructions, such as standardized manuals for venous or arterial blood collection, so that the collection procedure is safe for both the patient and the person carrying out the collection. (1) The antiseptic process should be carried out with circular movements from the center to the top, at the puncture site, and not with linear movements from distal to

proximal on the forearm, in order to induce venous stasis, a factor that affects the quality of the diagnostic specimen. Contamination at the puncture site can be favored by performing this procedure incorrectly. The time taken to apply the tourniquet should not exceed 1 minute. Applying the tourniquet during collection significantly increases the concentration of various analytes from 1 minute onwards, when compared to collection using a transdermal illumination system. To ensure that the application of the tourniquet does not interfere with the quantitative determination of the analytes, it should be removed when the needle is introduced into the vein. The erroneous act of constricting the forearm muscle, represented by the movement of opening and closing the hand that many patients perform spontaneously or on request, should be monitored, as it allows us to assess the phlebotomist's level of attention and any vices. Studies have shown that constriction of the forearm muscle causes an increase in serum potassium, significantly affecting the results and inducing a false diagnosis. (4) In 1982, Calam and Cooper observed that the order of withdrawal of blood into tubes containing additives can alter potassium and calcium. These recommendations were validated by the Clinical and Laboratory Standards Institute and have been slightly modified over the years with the introduction of plastic instead of glass tubes and the development of clot activator and gel separator additives. (12) It is also important to note that according to the Brazilian Society of Clinical Pathology/Laboratory Medicine (SBPC/ML), the World Health Organization (WHO) and the Clinical Laboratory Standards Institute (CLSI), in order to obtain acceptable quality and avoid contamination of samples by metals or anticoagulants present, a specific order is suggested for collection in vacuum tubes: sodium citrate (light blue), serum with or without clot activator (red), heparin (green), ethylenediamine tetraacetic acid (EDTA, purple), oxalate/fluoride (gray). However, research carried out in Belgium has shown that there is no relevant interference in laboratory tests, regardless of the order in which the tubes are collected. However, this statement still needs to be analyzed carefully, as it contradicts the common sense that had existed until then about the importance of the order of collection. (10)

Observing the correct homogenization of the specimen diagnostic makes it possible to monitor a critical stage of the phlebotomy procedure. Correct homogenization the complete inversion of the tube followed by the return to the initial position for the number of times recommended by the manufacturer. (4)

To keep patient and sample identification safe, at least two forms of identification should be used

for the tubes collected. For example, the patient's full name and date of birth should be asked clearly and objectively, and the samples should be identified at the time of collection or at the time of delivery to the clinical laboratory. Biological samples from patients must be transported and preserved in isothermal containers, where required, which are hygienic, impermeable, identified with the biohazard symbol and the words "Specimens for Diagnosis", and with the name of the laboratory responsible for sending them, guaranteeing the stability of the collection until the test is carried out. Once the samples have been collected and properly identified, they should be sent as quickly as possible for processing, which may be located in the same physical structure where the collection took place, or at varying distances. According to the Mercosur Standardization Association (AMN), which drew up the Mercosur Standard (NM311-4:2009), which establishes the criteria for rejecting biological samples in clinical laboratories, the samples must be collected, identified, transported and processed in accordance with the rules, with the aim of reducing pre-analytical treatment interferences. For laboratory results to be accurate, samples must be representative, so, they must present the patient's homeostatic conditions at the time of collection. For this reason, samples that show one or more of the following characteristics should be rejected:

- Clotted sample for tests such as blood count and coagulation tests;
- Collection carried out with incorrect anticoagulant;

- Tubes collected with the wrong proportion of blood and anticoagulant;
- Tubes containing samples with incorrect identification;
- Incorrect tubes and no patient identification;
- Hemolyzed, lipemic or insufficient blood samples;
- Samples not transported properly. (1)

Some publications contain the indicators most used by clinical laboratories and their limits of acceptability. This data enables other laboratories to monitor their processes in search of improvement. In addition, the improper choice of laboratory tests or their panels also can be considered a pre-analytical error. For all these reasons, during the request for a laboratory test, the requesting doctor must give precise and clear instructions on the precautions necessary before collecting the biological sample, since the patient is not a null factor and is capable of compromising the quality of the service provided. In addition, the patient should contact the laboratory before the sample is taken to reinforce the information received and eliminate any relevant doubts. (6)

Laboratory errors and their impact on patients

Errors in diagnosis are a major threat to patient safety, as they can lead to fundamental delays and/or missed diagnoses, especially when it comes to patients with serious medical conditions such as heart disease, endocrine diseases and cancer. It is estimated that approximately 70% of all diagnoses are made on the basis of laboratory tests, and that their results are responsible for affecting between 60% and 70% of decisions on patient admission, discharge and treatment regimen. (1)

Risks define laboratory indicators as numerical measures of errors or failures in a given process in relation to its total number (hits and errors). They are specifications of quality, because the performance of a process is adequate when it is within the limits set by the indicators. Their aim is not just to provide answers, but to point out potential problems. (3)

The pre-analytical phase has failures ranging from 46% to 68.2%, the most common of which are insufficient samples, collection errors, inadequate handling and transportation and incorrect identification. In the analytical phase, errors can vary from 7% to 13%, and can occur when samples are exchanged, interference and equipment malfunctions. Finally, in the post-analytical phase, where 18.5% to 47% of errors occur, the vast majority are due to incorrect entry of information, data and results. Generally, when errors start in the pre-analytical phase, they are only corrected in the last stage of the laboratory process. (8)

The relevance of pre-analytical errors as a public health problem is related to potential harm to patients and extra costs for the system. Increasing automation in health services is not always the best indication in terms of quality control, as it can expose patients to risks and systematic errors beyond their control, which could put patients at risk and lead to unnecessary costs. (13) We should note that the most important element of pre-analytical in the production of errors in the pre-analytical phase is due to human activity, in which multiple individuals interact in the diagnostic specimen process. (5) These problems generally result from staff turnover, negligence, lack of understanding of good laboratory practices and ineffective training. (1,2)

Patient safety and confidence in the clinical analysis results issued are currently a priority in laboratories. The occurrence of errors is also related to failures in the planned action, whether intentional or not, or to the application of an incorrect plan in the procedure. (8) In order to minimize pre-analytical errors, it is necessary to correctly advise patients regarding the need to fast prior to sample collection, the suspension of strenuous physical exercise in the period prior to collection, and other information regarding smoking habits and the period of the menstrual cycle. It is important to obtain information on the use of medication and therapeutic drugs. The main errors

are also in the identification of samples, inadequate filling of tubes, hemolysis and lack of information about the patient.

Therefore, the right training is needed in order to carry out the task. When collecting biological materials invasively (arterial, venous and/or capillary blood), to avoid interfering with laboratory results, such as the patient's posture at the time of collection, the time the tourniquet is applied, the effect of constricting the forearm muscle before puncturing, the correct order of the tubes in vacuum system collections and homogenization. To avoid major errors in the pre-analytical phase, at the time of collection, the puncture should not be carried out in areas where previous punctures have been carried out, such as mastectomies, intravenous infusions, edema, hematomas; "do not apply tourniquets", because hemolysis can occur, especially in elderly patients with atheroma, because the plaque could be displaced, with serious consequences. (5)

These are the main changes that resulted in the errors described in the research:

- time in storage (78.6%);
- time with the tourniquet (78.6%);
- techniques of the phlebotomist (64.3%);
- incorrect information to patients (64.3%);
- incorrect blood/anticoagulant balance (57%);
- incorrect tubes (50%);
- samples with some kind of contamination (43%);
- medicines (29%);
- variations between laboratories (29%).

The demonstration of laboratory errors varies according to the laboratory and depends on a good QMP (Quality Assurance Program) that is evaluated frequently, professional development programs or refresher courses, in which the laboratory worker goes through the various laboratory sections. An efficient QMP helps with the choice of methods, equipment, reagents and personnel, as well as promoting constant observation of all activities. Its aim is to increase the safety of results and effectively guarantee a quality end product. (7)

Management and quality in the clinical analysis laboratory

Quality is defined as compliance with user and/or client requirements, and refers to the satisfaction of needs and expectations. It is therefore important that health services focus on the individuals who use them directly or indirectly. With the complexity of laboratory processes, it is necessary to implement quality programs in order to improve the quality of the service, increase productivity and lower costs. (14) A quality management program is indicated for improvements in laboratory processes using risk management and process improvements. (1)

Management requires organizing the main laboratory processes involved:

- People management;
- Infrastructure;
- Information technology;
- Equipment management;
- Customer service;
- Production of laboratory tests;
- Biosafety;
- Business management;

- Logistics;
- Quality management;
- Environmental management;
- Project management.

In Brazil, the RDC (Collegiate Board Resolution) that regulates the operation of clinical laboratories is No. 302/2005. It was published on October 30, 2005, and clinical laboratories and collection points had 180 days (April 2006) to comply. This resolution had some requirements clarified through Technical Note No. 039/2014 (GRECS/G TES/Anvisa) and RDC No. 30/2015. It is important because it regulates the operation of clinical laboratories in the general organizational conditions, human resources, infrastructure, laboratory equipment and instruments, diagnostic products for in vitro use, waste management and biosafety. It also organizes the operational processes of the analytical, pre-analytical and post-analytical phases, guaranteeing quality control and records for laboratory traceability. (14)

Quality as a management model began in Japan and was later adopted by North American and European companies. (9) In the industrial evolution of the 1920s, the war industries needed to increase the production of armaments because of the World War. This led to the introduction of inspection with the aim of evaluating the product and separating defective products to prevent them from being marketed. The first phase in the evolution of quality was the creation of the production engineering department in the industries, instituting statistical instruments aimed at measuring and controlling quality, used for product analysis. In the decades that followed, the evolution of quality became more and more important. This was especially evident in Japan, which needed to rebuild economically after the war. The quality assurance phase began, with the aim of prevention. This led to concern about quality in companies. In 1950, W. Edwards Deming created a new concept in quality called the PDCA cycle, whose initials stand for plan, do, check and act. Nowadays, quality is important for the survival of organizations in the market, especially customer satisfaction. Therefore, the need for quality, increased productivity and reduced costs have become essential for a company to remain in the market and be competitive. (3)

The concepts of quality in healthcare are the same as in industry. A product or service that meets customer needs is a quality principle applicable to the various healthcare services. Therefore, laboratories must adopt a quality management system with controls for all phases, in order to identify and deal with non-conformities, applying corrective and preventive actions, with the aim of guaranteeing the quality of laboratory analyses, correct diagnosis and minimizing negative impacts on patients' health. (9)

The SBPC/ML (Brazilian Society of Clinical Pathology/Laboratory Medicine) has played a fundamental role in the history of quality and laboratory accreditation. When it was founded in 1944, its statute already had the objective of setting standards for the performance of different types of laboratory tests. In the 1970s, he recommended revising and adapting the practices of the College of American Pathologists (CAP) to the Brazilian reality, with the Brazilian Journal of Clinical Pathology, a publication of the SBPC/ML itself.

In 1977, it obtained a contract with Control-Lab and was thus able to set up the first internal and external quality control program in the country, called Programa de Excelência de Laboratórios Médicos (PELM), and in 1998 it created PALC (Programa de Acreditação de Laboratórios Clínicos), which were revised and updated in 2004, 2007 and 2010. PALC provides Brazilian laboratories with a guideline for continuous quality improvements, mainly due to peer audits, i.e. by laboratorians, allowing for the exchange of technical knowledge between auditors and auditees. Recently, in partnership with Control-Lab, SBPC/ML made the Laboratory Indicators Program available, giving Brazil's clinical laboratories the possibility of standardizing indicators, as well as comparing them. In 1999, the ONA (National

Accreditation Organization) was created with the aim of implementing improvements in the quality of health care, encouraging services to achieve high quality standards (www.ona.org.br). In 2001/02, the National Health Surveillance Agency (ANVISA) officially recognized the Brazilian Accreditation System through Resolution No. 921/02 and signed an agreement with ONA for technical collaboration and staff training, which included the participation of the SBPC/ML. (3)

In the provision of health services there are two basic components of quality: operational, corresponding to the process, and perception, in which the clients' view of the service offered is noted. Both are measured by quality indicators and by the recognition obtained through certification or accreditation processes. (3) The indicators also allow for internal and external comparisons with other services with the same characteristics. In quality management, they are called control items. (2) Certification is also important, as it proves that certain products, processes or services are carried out or fulfilled in accordance with specified requirements, as is the case with International Organization for Standardization (ISO) standards. In accreditation, processes are evaluated in order to verify their suitability for the services being offered, as well as compliance with the requirements demanded in a certification. For example, accreditation of the National Accreditation Organization (ONA), the Joint Commission on Accreditation of Healthcare Organizations (JCAHO) and the Clinical Laboratory Accreditation Program (PALC) of the Brazilian Society of Clinical Pathology/Laboratory Medicine (SBPC/ML). (3)

Quality in the pre-analytical phase of laboratory medicine is essential. Thus, we can define indicators that are related to the overall quality management system in laboratories, which is fundamental to reducing vulnerabilities, emergence and the proliferation of errors. (13) It is therefore important to reconcile cost and benefit, paying attention to the quality of the service. The quality movement, known as Total Quality Management (TQM), has brought about practical changes in management, both in the production of goods and in the service sector. Initially, this movement focused more on the technical quality standards defined by professionals in the sector and, later, began to consider and pay attention to the quality standards and expectations perceived by the customer. In this respect, the literature indicates that satisfied customers bring benefits to companies, as they tend to make repeat purchases from the same supplier, as well as spontaneously contributing to the company's "word of mouth" advertising. (15)

Even with all the recognition of the pre-analytical phase, it lacks specific indicators within the quality management system in clinical laboratories, making it more vulnerable to the appearance and increase of errors. This finding characterizes the dark side of the problems associated with laboratory quality. (4)

Material And Methods

In order to present the proposed theme, research was carried out on scientific databases. The articles were analyzed for their recognition of the topic. In view of the new circumstances in which clinical analysis tests have become essential for medical diagnosis, this study aimed to present a tool to avoid errors in the pre-analytical phase, through a literature review, with data collection in the National Library of Medicine (PubMed) and Scientific Electronic Library Online (SciELO).

Conclusion

From the studies analyzed in the review, it can be seen that pre-analytical errors will always occur, as it is a phase which involves the largest number of people from different areas and backgrounds. However, they can be minimized with the support of quality control strategies adopted by everyone who works in diagnostic medicine. However, it is important to maintain knowledge of the consequences of laboratory errors and their impact on health care, which can mean losses to the public purse and unnecessary expenditure on medicines and medical procedures, prolonging hospitalization time, new biological sample collections, repeat tests or even

delaying or not performing a surgical intervention. Errors during healthcare can have serious consequences for the patient, ranging from disability to death.

With this review, we hope to organize information that will be of great value in alerting all professionals to the importance of the pre-analytical phase for medical diagnosis.

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