Lab Sample Collection and Labelling

1. Purpose and scope

Every sample is collected from the right patient, labelled at the time of collection and handed over with the right form. This SOP sets the order of those steps so that none is skipped when the collection room is busy.

Item	Detail
Applies to	Diagnostic labs, hospital collection rooms and home collection teams
Done by	Sample collection staff and lab reception
Owner	Lab manager or lab in-charge
Time target	Set by the lab manager for each collection point
Review	Every 6 months and after any labelling error

2. The steps

1. **Check the request form.** Read the doctor's request or the booking. Check the patient's name, age, gender and the tests listed against the form before anything else.
2. **Confirm who the patient is.** Ask the patient to say their own name and date of birth aloud. Do not say the name for them. Match both with the form and the ID as per your lab policy.
3. **Explain and take consent.** Tell the patient which tests will be done. Take consent as per your lab policy.
4. **Prepare the right containers.** Pick the containers your lab policy lists for each test. Check that they are within their date.
5. **Collect the sample.** Trained staff collect it as per your lab's clinical procedure.
6. **Label in front of the patient.** Write or print the label with the patient's name, ID number, date and time of collection. Put it on the container before leaving the patient and never in advance.
7. **Match label and form.** Look once more: the label, the container and the form show the same name and ID. Fix any mismatch at once, with the patient present.
8. **Pack and log the sample.** Pack as per your lab policy. Record the collection time and the handover time in the register or software.
9. **Hand over to lab reception.** Reception counts the samples, checks the labels against the list and signs for them. Any mismatch goes back to the collection staff the same hour.

3. Sample collection checklist

Print this, keep it in the collection room and tick it for every patient during the first two weeks.

- ☐ Request form checked against the booking
- ☐ Patient said their own name and date of birth
- ☐ Consent taken as per policy
- ☐ Containers chosen as per policy and within date
- ☐ Sample collected as per the lab procedure
- ☐ Label done in front of the patient
- ☐ Label, container and form matched
- ☐ Collection time recorded
- ☐ Samples counted and signed at lab reception
- ☐ Mismatches returned the same hour

4. Where this can break

Any SOP template lists the steps. These are the points where a busy collection room can slip, with a simple fix for each.

Where it breaks	What happens	The fix
Labelling later	Samples can be labelled in a batch after collection. Two samples can get swapped.	Label in front of the patient before the next patient is called.
Name said for the patient	The patient can say yes to a wrong name.	The patient says their own name and date of birth.
Wrong or missing form	Tests can be missed or done twice.	Check the form against the booking before collection.
Time not recorded	The lab cannot tell how long the sample waited.	Record the collection and handover times every time.
Rush hour	Steps can be skipped when the queue is long.	Two checks are never skipped: the patient says their own name and the label goes on in front of them.
Home collection gaps	Samples can go untracked between homes and the lab.	A handover list signed at the lab.

5. How to roll it out in 3 days

A new SOP fails when it is just handed over. This order gets the collection and reception staff using it within a week.

Day	What happens	Who
Day 1	30-minute walkthrough with collection and reception staff, using 5 real request forms from last week with patient names hidden. Ask them where errors happen today.	Lab manager
Day 2	Watch one busy collection hour. Fix the two biggest problems, using Section 4.	Lab manager
Day 3	Checklist goes in the collection room. At closing, the manager checks 10 random samples against it.	Manager and collection staff

After that, a 5-minute check of 10 samples once a week is enough to keep it working.

6. BEYOND the Checklist

This SOP works on the day it is introduced. Three months later, a new collection assistant has joined and learned the labelling from whoever was free. Teams change over time, so a written SOP needs three things it can't do by itself:

- **A 2-minute training video** of the collection steps, in the language staff speak, so every new joiner learns the same way on day one.
- **A local-language version** of the checklist.
- **A weekly 5-minute check** that someone actually owns.

Your own process: if your lab runs collection differently from this one, a 2-minute WhatsApp voice note on how it works today is enough. A written SOP in this same format comes back within 48 hours, at no cost. WhatsApp: +91 98101 41173 (India) | +250 799 524 457 (Rwanda)

Free Healthcare SOP 04 by Visionhunt. One series: each SOP covers a different business, from healthcare to manufacturing. Free to use, copy and adapt. This is a general template for the process prepared by a communication and training company and not by a healthcare provider. The clinical rules come from your own lab policy and local regulations. Have your lab manager review it before you adopt it.