KAISER PERMANENTE®

DOCUMENT NUMBER:

DOCUMENT TITLE:

DOCUMENT NOTES:

LOCATION:	VERSION:

DOC TYPE:	STATUS:

EFFECTIVE DATE:	NEXT REVIEW DATE:

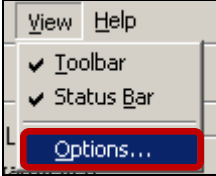| RELEASE DATE:	EXPIRATION DATE:

AUTHOR:	PREVIOUS NUMBER:

OWNER:	CHANGE NUMBER:

Transferring / Tracking Specimens

Purpose   This procedure provides instructions for transferring and tracking specimens from their current location to the testing laboratory location.

Scope   This procedure is intended for all users.

Adding Temperature to the Transfer List Fields   Follow the steps below to add **temperature** to the Transfer List fields.

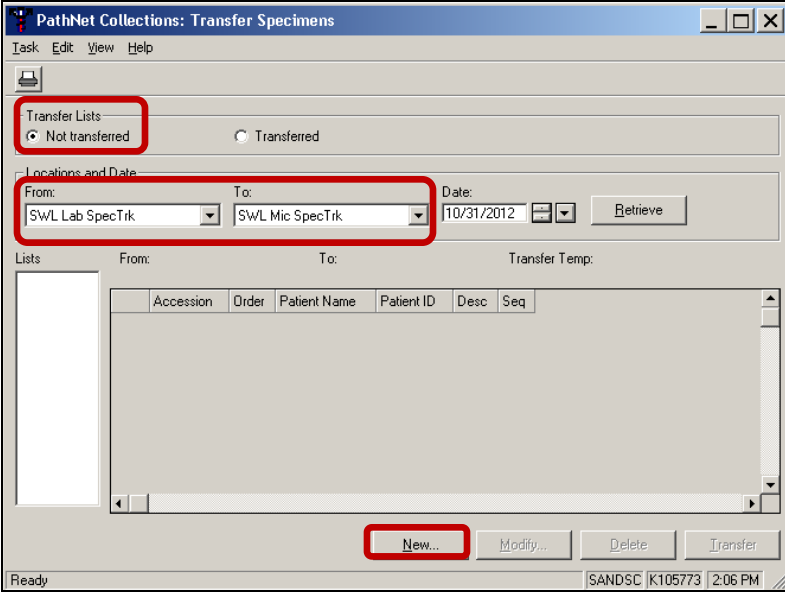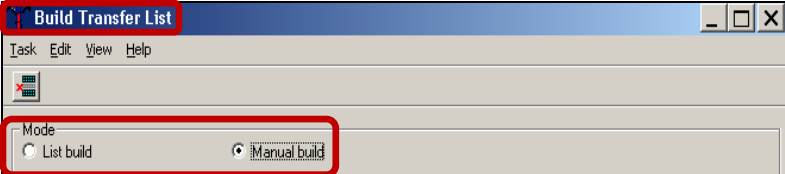| Step	Action	Icon
1	Click on the **Transfer Specimen** icon from the Applications bar (Appbar) to launch the application.	
2	Click on **View** on the menu bar, and then select **Options**.	
3	Check the box for **Filter by transfer temperature**.	
4	Select a default **Printer.**	
5	Click on **Save**.	

Transferring / Tracking Specimens, Continued

Creating a Transfer List (Manual Build mode)

Follow the steps below to create a transfer list (**Manual Build mode**).
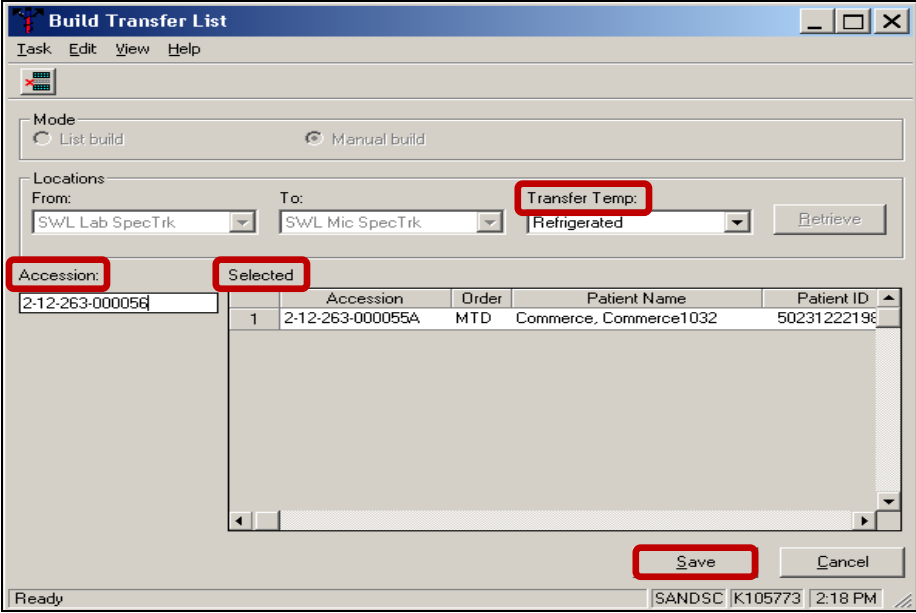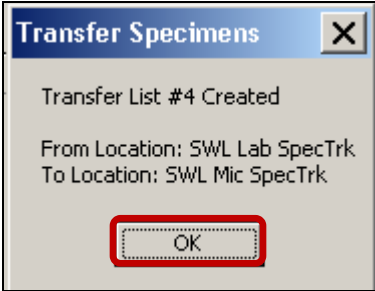
Note:
Specimens must be logged-in before they can be transferred.

Step	Action	
1	Click on the **Transfer Specimen icon** from the Appbar to launch the application.	
2	• The **Transfer Specimens** window opens. • Verify that **Not transferred** is selected. • Using the drop-down window, select the **From** Location. • Using the drop-down window, select the **To** Location. • The **To** Location is the **performing** location. • Click on the **New** button at the bottom right of the screen. 	
3	• The **Build Transfer List** dialog window opens. • Under **Mode**, select **Manual Build**. 	

Transferring / Tracking Specimens, Continued

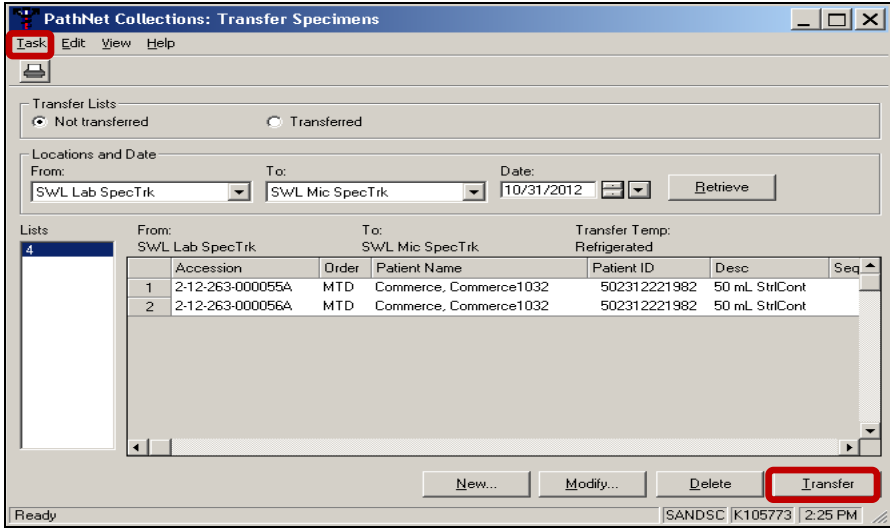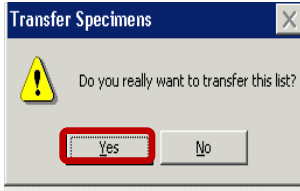**Creating a Transfer List (Manual Build mode)**, continued

Step	Action
4	- Select the **Transfer Temperature**. - Click in the **Accession** field. - Scan or type the accession number of the specimen to be added to the transfer list. Press **Enter** to move the accession number from the **Accession** window to the **Selected** window. Repeat the step for each specimen to be added to the Transfer List. - Click on **Save**.
5	- The **Transfer Specimens** dialog window is displayed. - Click on the **OK** button to close the window.

Transferring / Tracking Specimens, Continued

Creating a Transfer List (Manual Build mode), continued
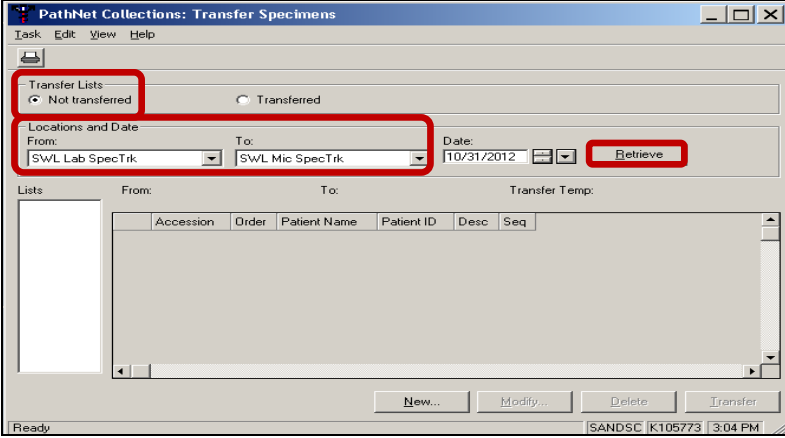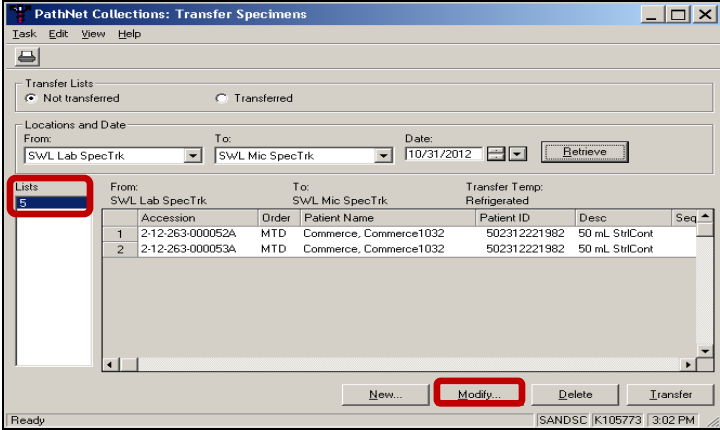
Step	Action
6	• If additional specimens will be added to the list at a later time, click on **Task**, then on **Exit** on the Menu Bar to exit the **Specimen Transfer** window. Proceed to **Modifying a Transfer List**. **OR** • To close the list so no additional specimens can be added, click on **Transfer**.* ***Note:*** ***Any open Transfer Lists are to be closed a few minutes prior to the established Courier pick-up time, or at the end of the business day if you are working at an MOB.***
7	• Click on the **Yes** button to transfer the list. • Select a printer when prompted.

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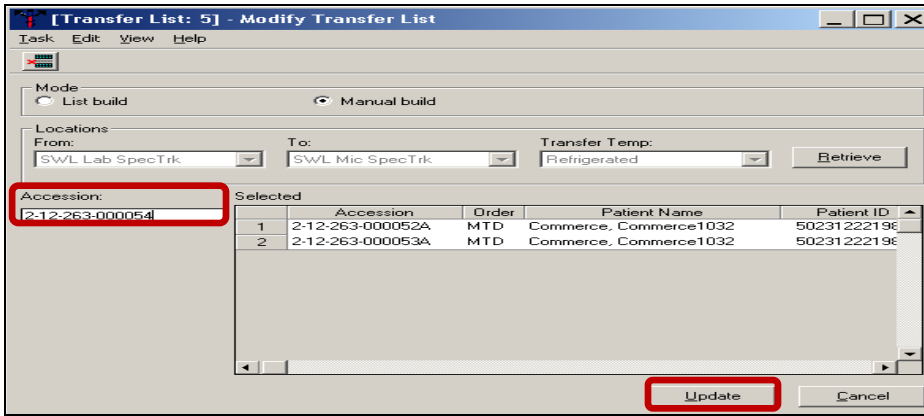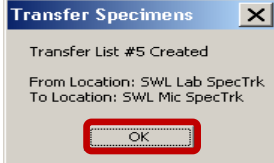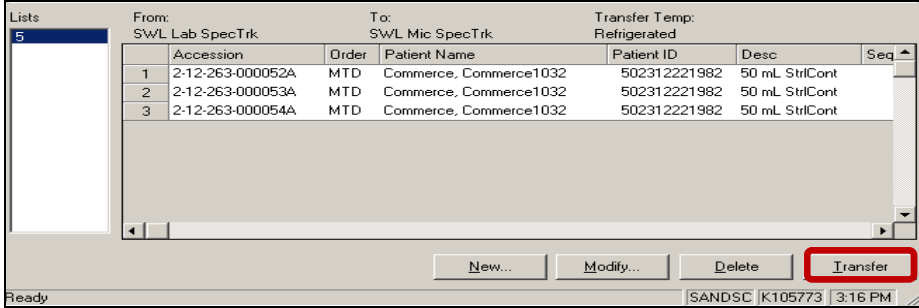
Modifying a Transfer List   Follow the steps below to modify a transfer list.

Step	Action	Icon
1	• Click on the **Transfer Specimen** icon from the Appbar to launch the application.	
2	• The **Transfer Specimens** window opens. • Verify that **Not transferred** is selected. • Using the drop-down window, select the **From** Location. • Using the drop-down window, select the **To** Location. • Verify the **Date**. • Click on **Retrieve**. 	
3	• Select the **Transfer List Number** to which specimens will be added. • Click on the **Modify** button. 	

Transferring / Tracking Specimens, Continued

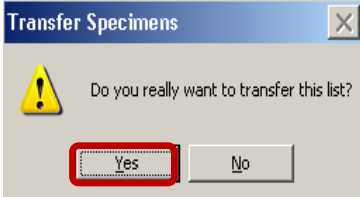**Modifying a Transfer List,** continued

Step	Action
4	• In the Accession field, scan the **label barcode** for the specimen to be added to the selected transfer list. Press **Enter**. • Repeat the step for all specimens to be added to the list at this time. • Click on **Update** to save the additions.
5	The **Transfer Specimen** window appears showing the transfer list number. Click on **OK**.
6	Click on **Transfer** to close the list. No additional specimens can be added.

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Transferring / Tracking Specimens, Continued

Modifying a Transfer List, continued

Step	Action
7	• Click on the **Yes** button to transfer the list. • Select a printer when prompted. **Transfer Specimens** ⚠ Do you really want to transfer this list? [Yes] [No]

Associating the Transfer List with Outer Tub

Follow the steps below to associate the Transfer List with Outer Tub Tracking Number.

Step	Action	Icon
1	Access the **Explorer Menu** icon on the Cerner AppBar.	◈
2	• Double-click on **Main Menu.** • Click on the + **sign** to the left of the **Specimen Tracking** folder. **Discern Explorer: Explorer** Task Edit View Help Main Menu *Specimen Tracking* Blood Bank HNAM Cance Blood Bank Reports Charge Services Reports Clinical Event Report Men Core Daily Maintenance Core Database Audits Core Security Audits Custom Reports Discern Explorer Data Dic Expert Audits Explorer Menu Audits Gen Lab Reports HIM Reports Helix Imaging - Document	
3	Click on **Transfer List to Outer Tub**. Main Menu *Specimen Tracking* Accn Tracking History Transfer List to Outer Tub	
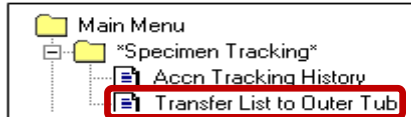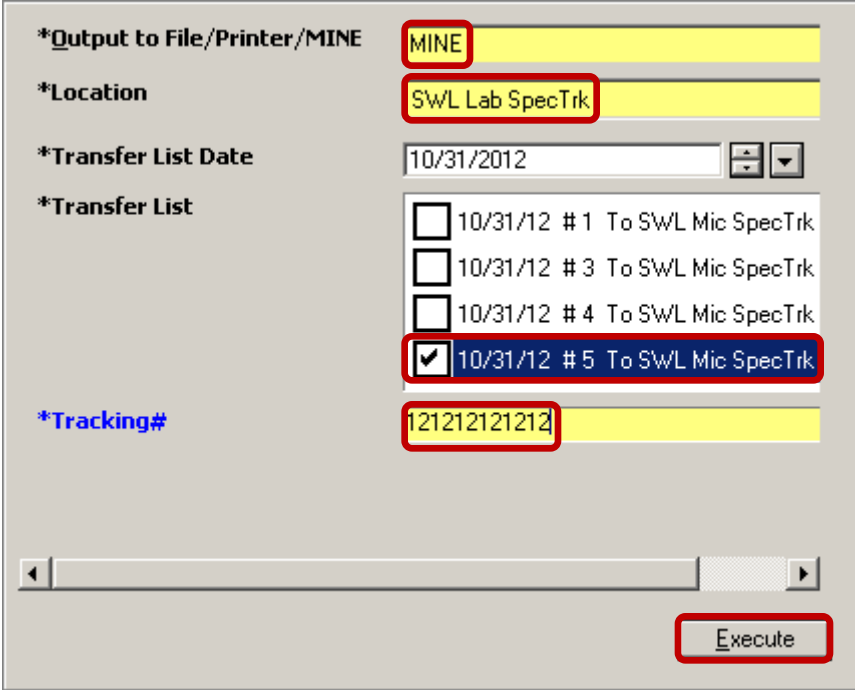
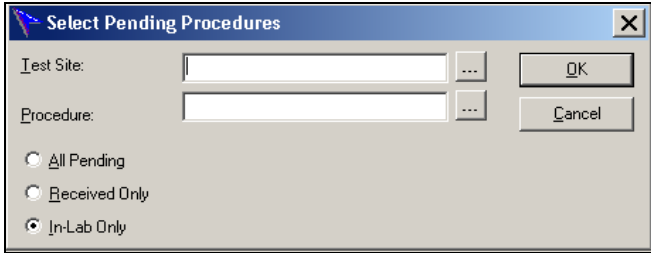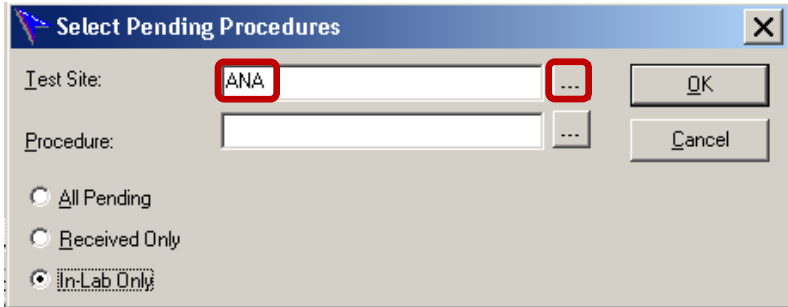# Transferring / Tracking Specimens, Continued

Associating the Transfer List with Outer Tub, continued

Step	Action
4	• Enter the printer name in the *Output to file/Printer/MINE field. • Select the *Location from the drop-down menu. • Select the *Transfer List(s) to be associated with the outer tub. • Click in the *Tracking# field. Scan the barcode for the outer tub. • Click on Execute. The Transfer List to Outer Tub report prints. **Note:** **If MINE is selected in the Output… field, the report will not automatically print when Execute is clicked.** *Output to File/Printer/MINE MINE *Location SWL Lab SpecTrk *Transfer List Date 10/31/2012 *Transfer List ☐ 10/31/12 #1 To SWL Mic SpecTrk ☐ 10/31/12 #3 To SWL Mic SpecTrk ☐ 10/31/12 #4 To SWL Mic SpecTrk ☑ 10/31/12 #5 To SWL Mic SpecTrk *Tracking# 121212121212 Execute
5	Secure the Outer Tub in preparation for Courier pickup.

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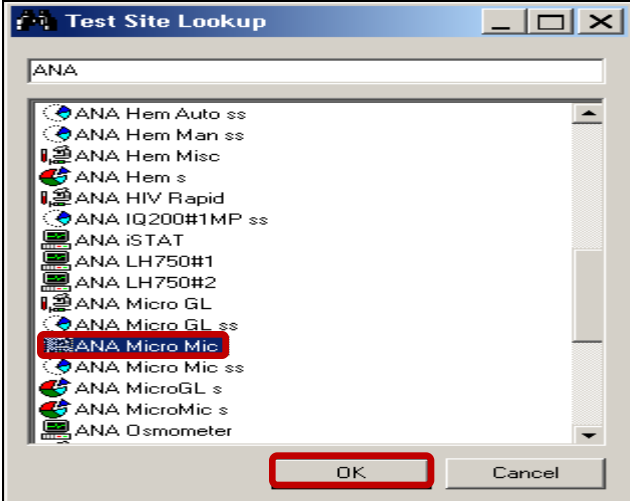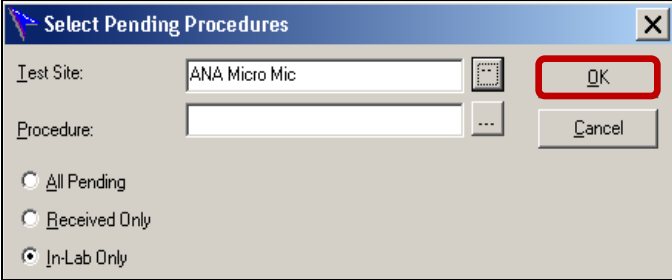
Transferring / Tracking Specimens, Continued

Changing the Designated Test Site

Follow the steps below to change the designated test site for at test or group of tests.

Step	Action	Icon
1	• Click on the **Pending Inquiry** from the Appbar to launch the application. • The **Select Pending Procedures** window opens. *Select Pending Procedures window:* Test Site: [ ] OK Procedure: [ ] Cancel ○ All Pending ○ Received Only ● In-Lab Only	*(inquiry icon)*

2	• Enter the **Test Site** (site abbreviation) and click on the **ellipses**.
	• Enter the **Procedure** (if desired).
	• Select the **Order Status** for the order(s) to be transferred.
	
	  • **Test Site** is the site abbreviation.
	  • **Procedure** is the test name.
	  • **All Pending** displays all pending orders for the test site and/or procedure.
	  • Both **Received Only** and **In-Lab Only** display all pending orders with an In-Lab status.
	
	Select Pending Procedures window:
	Test Site: [ANA] OK
	Procedure: [ ] Cancel
	○ All Pending
	○ Received Only
	● In-Lab Only	

Transferring / Tracking Specimens, Continued
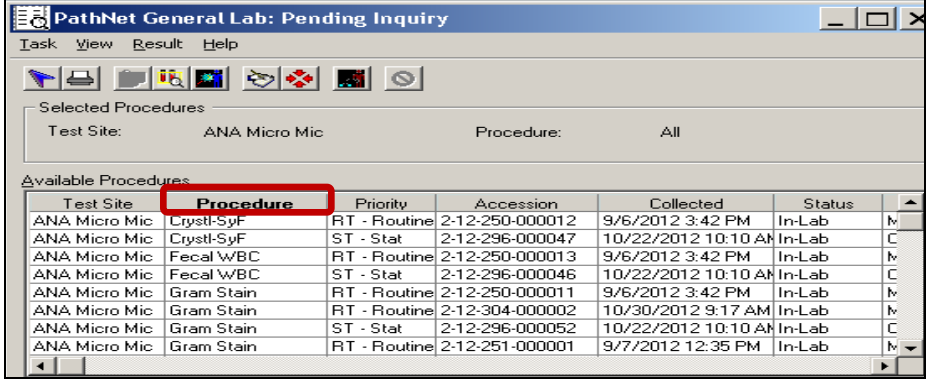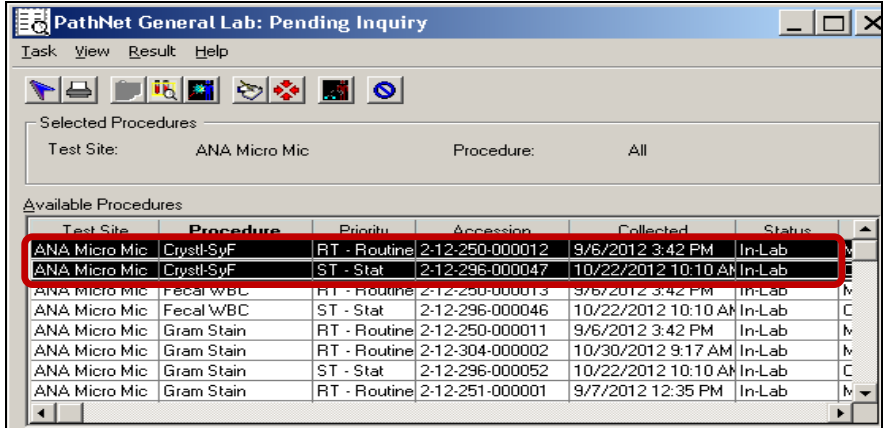
Changing the Designated Test Site, continued

Step	Action
3	The **Test Site Lookup** window opens. • Select the specific site from the drop-down list. • Click on **OK**. The **Test Site** box is populated with the selected specific site. • Click on **OK**.

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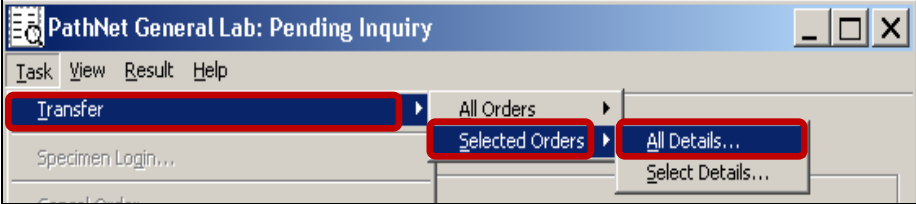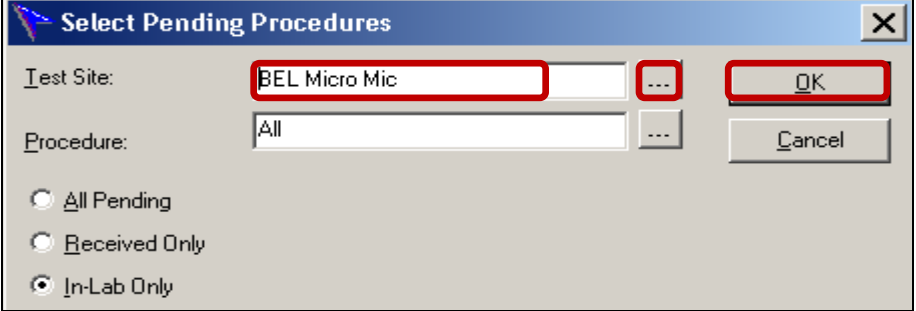
Transferring / Tracking Specimens, Continued

Changing the Designated Test Site, continued

Step	Action
4	The **Pending Inquiry** window opens. • Clicking on the column header will sort data in that column.
5	Select the order or orders to be transferred. • For a single accession, click on the **row** containing that accession. • For multiple orders listed in sequence: {{table}}

The sub-table in Step 5:

If…	Then…
the orders are in sequence	• Click on the **first order** in the sequence. • Press and hold the **Shift** key. • Click on the **last order** in the sequence. • Release the **Shift** key.
the orders are not in sequence	• Click on the **first order** to be transferred. • Press and hold the **Ctrl** key. • Click on any **additional orders** to be transferred. • Release the **Ctrl** key.

Transferring / Tracking Specimens, Continued

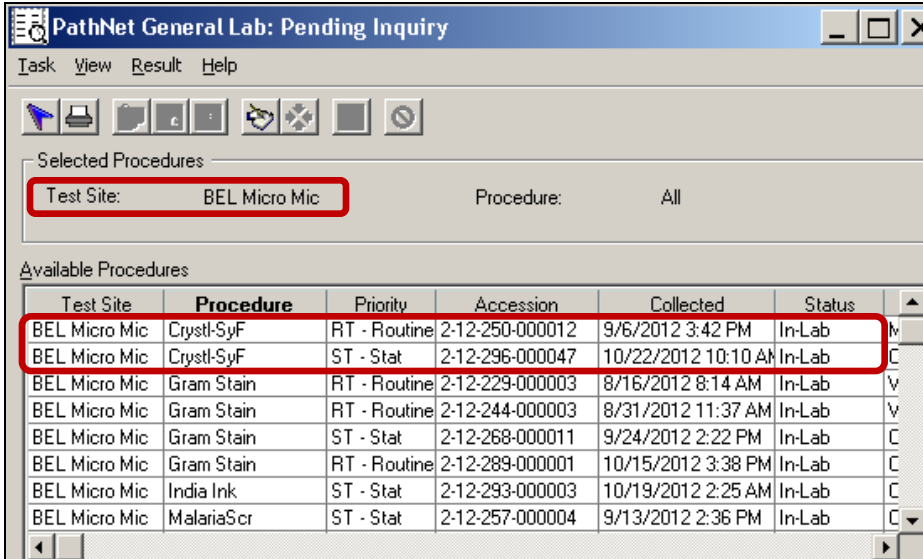**Changing the Designated Test Site,** continued

Step	Action
6	• Click on **Task** on the menu bar. • Select **Transfer** > **Selected Orders** > **All details.** PathNet General Lab: Pending Inquiry Task View Result Help Transfer → All Orders → Selected Orders → All Details... Specimen Login... Select Details...
7	• The **Transfer** window opens. • Select the Test Site in the **Transfer to Selected Orders To** field, clicking on the **ellipses** as needed. • To reprint labels for the specimens being transferred, select **Reprint Labels.** • Click on **OK.** Transfer Transfer Selected Orders To: BEL Micro Mic [...] ☐ Reprint Labels OK Cancel
8	To check if the selected orders are transferred to the new **Test Site** for resulting: • Enter new Test Site in the **Test Site** box, clicking on the **ellipses** as needed. • Click on **OK**. Select Pending Procedures Test Site: BEL Micro Mic [...] OK Procedure: All [...] Cancel ○ All Pending ○ Received Only ● In-Lab Only

Transferring / Tracking Specimens, Continued

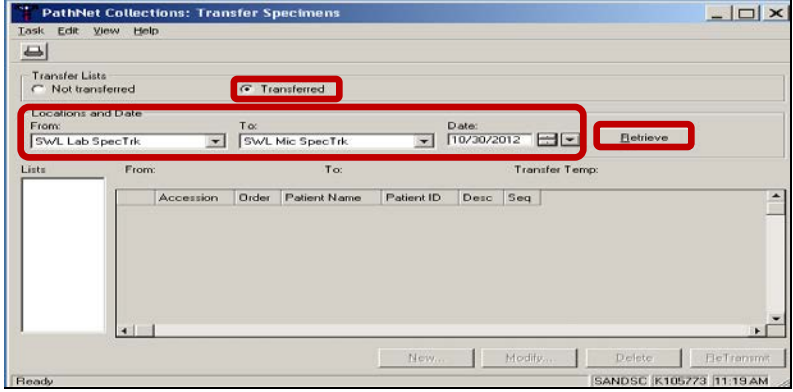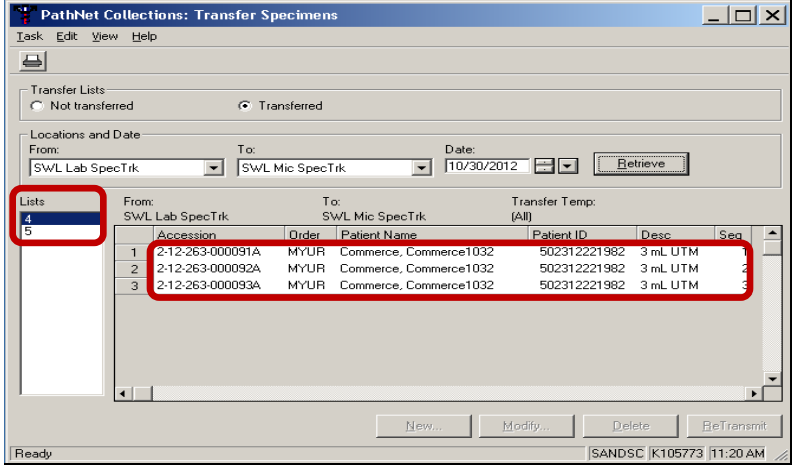**Changing the Designated Test Site,** continued

Step	Action
9	The **Pending Inquiry** window opens showing the new performing location and the orders that have been transferred. ![PathNet General Lab: Pending Inquiry window] **PathNet General Lab: Pending Inquiry** Task View Result Help Selected Procedures Test Site: BEL Micro Mic Procedure: All Available Procedures | Test Site	Procedure	Priority	Accession	Collected	Status	
---	---	---	---	---	---	---
BEL Micro Mic	Crystl-SyF	RT - Routine	2-12-250-000012	9/6/2012 3:42 PM	In-Lab	M
BEL Micro Mic	Crystl-SyF	ST - Stat	2-12-296-000047	10/22/2012 10:10 AM	In-Lab	C
BEL Micro Mic	Gram Stain	RT - Routine	2-12-229-000003	8/16/2012 8:14 AM	In-Lab	V
BEL Micro Mic	Gram Stain	RT - Routine	2-12-244-000003	8/31/2012 11:37 AM	In-Lab	V
BEL Micro Mic	Gram Stain	ST - Stat	2-12-268-000011	9/24/2012 2:22 PM	In-Lab	C
BEL Micro Mic	Gram Stain	RT - Routine	2-12-289-000001	10/15/2012 3:38 PM	In-Lab	C
BEL Micro Mic	India Ink	ST - Stat	2-12-293-000003	10/19/2012 2:25 AM	In-Lab	C
BEL Micro Mic	MalariaScr	ST - Stat	2-12-257-000004	9/13/2012 2:36 PM	In-Lab	C	

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**Viewing a
Transfer List**

Follow the steps below to view a transfer list from any current or past date.

Step	Action	Icon
1	Click on the **Transfer Specimen** icon from the Appbar to launch the application.	
2	• The **Transfer Specimens** window opens. • Select either **Transferred** or the **Not Transferred** radio button • Enter the **From** and **To** locations, and the **Date**. • Click on **Retrieve.** 	
3	• Multiple transfer list numbers will display in the **Lists** box. • Highlight the transfer **List** number to be viewed. The specimens on the selected transfer list displays to the right of the **Lists** box. 	

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Non-Controlled Documents

The following non-controlled document supports this procedure.

- Cerner GenLab Participant Guide – Fall 2011 Version 2.1

Controlled Documents

The following controlled documents support this procedure.

Regional Parent Document Reference Number: SCPMG LIS – 0082 Rev. 2

Job Aid
Create a Transfer List
Modify a Transfer List
Associate a Transfer List to an Outer Tub
Transfer Specimens Using Pending Inquiry
Pocket Guide – Receptionists
Pocket Guide – Lab Assistant
Pocket Guide – Lab Assistant SWL
Pocket Guide – SPD and CSC SWL
Pocket Guide – CLS MC/MOB
Pocket Guide – CLS SWL

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