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:

PTC Export Monthly Verification

Purpose

This document will define the process for verification of the Patient Typing and Comment (PTC) Export database for database accuracy and for staff competency. The PTC export file contains all the patient demographic and vital transfusion information necessary for manual lookup during Cerner downtime. The database is stored on a designated workstation local hard drive in each medical center and can be retrieved from the Access database file during Cerner downtime.

Policy

- The PTC export will be tested monthly by at least 1 staff member on each shift to ensure they know how to access the program.
- The PTC export will be tested monthly to ensure that past records are still able to be retrieved and that new records are in the database.
- Do not use the PTC export during the time it is being uploaded to the dedicated local workstation, as this may result in corrupting the program. The uploads are at approximately at 9:00 AM daily. (A message will display when trying to access during the upload that the file is not available, and to try again later.)
- If there is a problem, notify Informatics support immediately—if there is a corrupt update there will be a failure.

Definitions

PTC Export	Access database file containing all patient's ABO, Rh antibody screen and special requirements (if applicable), which is uploaded daily to a local designated workstation's hard drive.
PTC Updates	Updates (extractions) occur nightly on a separate server from the Cerner database shortly after midnight. Therefore the records in the PTC export file are current up to the last update of the server and subsequent upload to the local workstation. For example; if the local medical center workstation is - Updated at 9:00 AM *and* - New results or special requirements are entered that same day *and* - The computer system (Cerner) goes down at 3:00 AM the following day Then all data entered after midnight from the prior day will **not** be captured in the most recent upload to the local workstation.

PTC Export Monthly Verification, Continued

Process	The following steps define how to verify the PTC export monthly using the PTC Export Verification Form.

Step	Action
1.	Have at least one staff member log on to the PTC export for each shift (include week ends if different staff). • Rotate between staff members so all staff are tested at least every 6 months. • If no records are reviewed, use the Records column to document Log on as OK or Not OK, complete the Shift, Staff Initials/NUID and date columns.
2.	If Log on is Not OK • Report to the Lab Manager or designee • May need to reassign password or re-train staff to Log on to the PTC Export database.
3.	Select records to test. • Select at least 5 that are new, either new patients or updated records that had been new since the last monthly verification. • Select at least 2 records from past testing (not tested in the last month, but tested previously).
4.	The above records can be tested by one individual, or split between different staff, i.e. half tested by PM and other half tested by AM.
5.	Each staff who performs the PTC verification records their current shift, initials and document in the appropriate box (new or old record) if the results were OK or Not OK <table><tr><td>If…</td><td>Then…</td></tr><tr><td>OK</td><td>Continue testing until completed</td></tr><tr><td>Not OK</td><td>Alert Lab Manager or designee immediately</td></tr></table>
6.	The Lab Manager or designee reviews the results monthly. • All issues must be resolved in a timely manner • If there is a problem with not updating information, contact Informatics support immediately to initiate an investigation. • After all review is complete, sign and date the form.

PTC Export Monthly Verification, Continued

Controlled Documents   PTC Export Monthly Verification Form

Authors   All SCPMG Transfusion Services Managers
Regional Blood Bank Compliance Officer

Distribution   All SCPMG Transfusion Services

PTC Export Monthly Verification, Continued

Reviewed and approved by:

Approved - electronically	March 22, 2012
Virginia Vengelen-Tyler, MBA, MT,ASCP(SBB), CQA(ASQ) Regional Blood Bank Compliance Officer	Date

Signature Collected Electronically	January 26, 2012
Adriana A. Bedoya, M.D. FCAP, FASCP Medical Director- San Diego –SA	Date

Signature Collected Electronically	January 26, 2012
Gary A. Gochman, MD, Medical Director – Tri-Central SA	Date

Signature Collected Electronically	January 26, 2012
Jeffrey D. Shiffer, MD. Medical Director –San Fernando Valley SA	Date

Signature Collected Electronically	January 26, 2012
Joseph C. Thompson, MD. Medical Director – Metropolitan SA	Date

Signature Collected Electronically	January 26, 2012
David R. Huebner-Chan, MD. Medical Director – Orange County SA	Date

Signature Collected Electronically	January 26, 2012
Dong A. Quach, MD. Medical Director –Inland Empire SA	Date

Signature Collected Electronically	January 26, 2012
Sony S. Wiriosuparto , MD. Medical Director- Tri-Central SA	Date

Signature Collected Electronically	January 26, 2012
Brian E. Platz, MD, Medical Director- West Los Angeles	Date

PTC Export Monthly Verification, Continued

DOCUMENT HISTORY PAGE
Released Date: <u>March 22, 2012</u>

Change type: new, major, minor etc.	Changes Made to Document – Describe	Signature responsible person/Date	Med.Dir. Reviewed/ Date	Ops Dir reviewed/ Date	Date change Imp.
New					

IMP = Implemented

MasterControl History of Change:		
Change type: new, major, minor etc.	**Version #**	**Description of Change**
Minor	2	• Updated format, removed "ILIDS support" from document, replaced with "Informatics support". Clarified process steps to enhance understanding.

Document Number: RL TS Computer - 0005   **Revision:** 2
Title: PTC Export Monthly Verification

All dates and times are in Pacific Standard Time.

PTC Export Minor

Minor Change Request

Name/Signature	Title	Date	Meaning/Reason
Helen Noriega (S688941)	ASST DIR AREA LAB		
Ann Sintef (G938509)	Regional Blood Bank Compliance	30 Jan 2018, 10:46:44 AM	Approved

RL TS LM Collaboration

Name/Signature	Title	Date	Meaning/Reason
Duane Doerr (T865608)	MGR AREA LAB		In Process
Richard Ulep (H355837)	MGR AREA LAB		
Lynne Sands (I924027)	LEAD CLS		
Monica Flores (K112468)	LIS Application Specialist		
Alberto Armijo (K139082)	LEAD CLINICAL LAB SCIENT		
Armineh Amirian (K230074)	LIS Application Specialist		
Jennifer Aidikoff (Q382370)	Blood Bank Manager		
Marie Rutledge (G533048)	Area Lab Manager		
Helen Noriega (S688941)	ASST DIR AREA LAB		
Brevet. Dao (Y363374)	MRG AREA LAB		
Nancy Messiah (O126459)	MGR AREA LAB		
Joanne Jocom (P170170)	MGR AREA LAB		
Jennifer Zalamea (P303429)	MGR AREA LAB	30 Jan 2018, 10:56:30 AM	Complete
Alejandra Salazar (K233690)	MRG AREA LAB	30 Jan 2018, 11:08:16 AM	Complete
Stephanie L Soliven (K215385)	Lab Area Manager	30 Jan 2018, 05:39:41 PM	Complete
Cynthia Calderon (A088729)	MGR AREA LAB	02 Feb 2018, 04:39:39 PM	Complete
Jane Byrne (Y784700)	MGR AREA LAB	05 Feb 2018, 03:13:35 PM	Complete
Gloria Escobedo (K255208)	AREA LAB MGR	07 Feb 2018, 12:53:57 PM	Complete
Jeremiah Ocampo (K607321)	MGR AREA LAB	05 Mar 2018, 04:52:10 PM	Complete
Ann Sintef (G938509)	Regional Blood Bank Compliance	07 Mar 2018, 10:47:37 AM	Complete

Final Approval

Name/Signature	Title	Date	Meaning/Reason
Julie Toti (K084521)	DIR AREA LAB	12 Mar 2018, 12:18:37 PM	Approved
Jeremiah Ocampo (K607321)	MGR AREA LAB	30 Mar 2018, 03:34:59 PM	Approved
Alejandra Salazar (K233690)	MRG AREA LAB	31 Mar 2018, 11:52:28 AM	Approved
Cynthia Calderon (A088729)	MGR AREA LAB	02 Apr 2018, 12:38:39 PM	Approved
Jane Byrne (Y784700)	MGR AREA LAB	02 Apr 2018, 01:45:26 PM	Approved
Jennifer Zalamea (P303429)	MGR AREA LAB	02 Apr 2018, 02:23:54 PM	Approved
Gloria Escobedo (K255208)	AREA LAB MGR	03 Apr 2018, 06:03:54 PM	Approved
Nancy Messiah (O126459)	MGR AREA LAB	05 Apr 2018, 07:08:59 AM	Approved
Brevet. Dao (Y363374)	MRG AREA LAB	08 Apr 2018, 10:38:18 PM	Approved
Jennifer Aidikoff (Q382370)	Blood Bank Manager	10 Apr 2018, 01:52:03 PM	Approved

Stephanie L Soliven (K215385)	Lab Area Manager	10 Apr 2018, 05:46:47 PM	Approved
Marie Rutledge (G533048)	Area Lab Manager	18 Apr 2018, 05:57:12 PM	Approved
Duane Doerr (T865608)	MGR AREA LAB	19 Apr 2018, 05:26:21 AM	Approved
Richard Ulep (H355837)	MGR AREA LAB	19 Apr 2018, 08:26:17 AM	Approved
Ann Sintef (G938509)	Regional Blood Bank Compliance	20 Apr 2018, 08:21:11 AM	Approved

Select Effective Dates

Name/Signature	Title	Date	Meaning/Reason
Helen Noriega (S688941)	ASST DIR AREA LAB		
Ann Sintef (G938509)	Regional Blood Bank Compliance	20 Apr 2018, 08:24:00 AM	Approved