KAISER PERMANENTE®

DOCUMENT NUMBER: SBMC-PPP-0523

DOCUMENT TITLE: Transferring/Tracking Outside Reference Laboratory Specimens

DOCUMENT NOTES:

LOCATION: SBMC-rel

VERSION: 02

DOC TYPE: SBMC PPP

STATUS: Release

EFFECTIVE DATE: 08 Nov 2018

NEXT REVIEW DATE: 07 Oct 2022

RELEASE DATE: 08 Nov 2018

EXPIRATION DATE:

AUTHOR:

PREVIOUS NUMBER: SCPMG-PPP-0103

OWNER: SBMC LIS Mgr

CHANGE NUMBER:

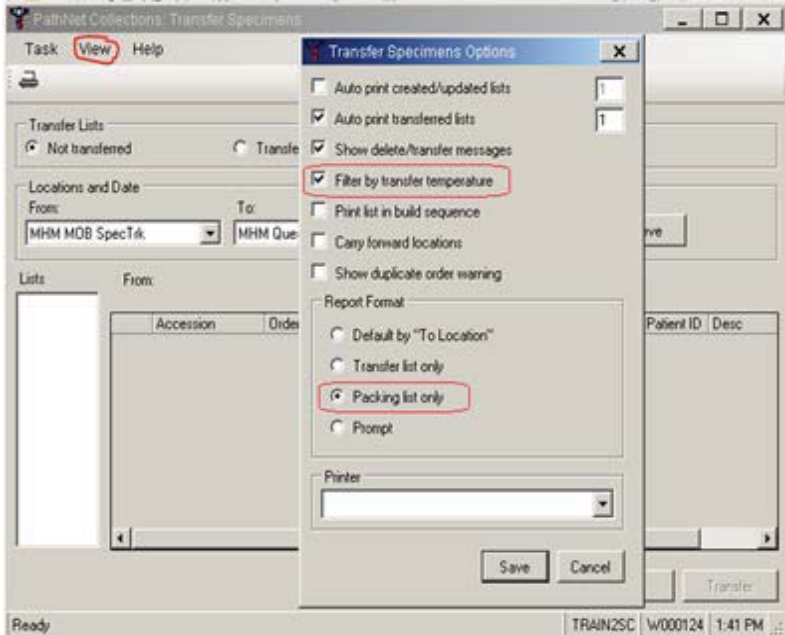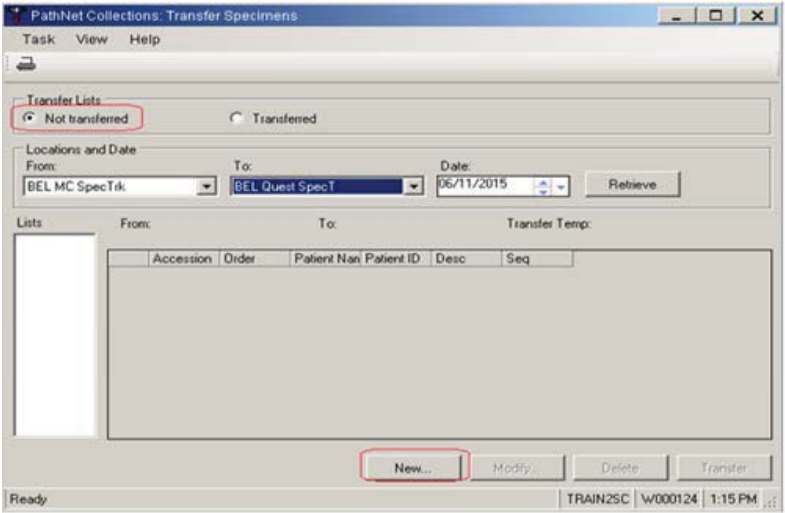| Kaiser Permanente	SCPMG Laboratory Systems
Medical Care Program	Laboratory Information Systems
California Division – South	Procedure

Transferring/Tracking Outside Reference Laboratory Specimens

Purpose	This procedure provides instructions for the transferring/tracking of reference laboratory specimens.
Scope	This procedure is intended for all users and applies to laboratory specimens sent to outside reference laboratories that are interfaced with Cerner using the Reference Laboratory Network.
Policy	Outside reference laboratory specimens collected and accessioned at any Non Send Out (Pick Up) locations (i.e. MOB draw stations) must be transferred and tracked to the designated medical center lab or Regional Specimen Processing for send out/pick up by outside courier.
Definition	**Send Out (Pick Up) Location** – A designated laboratory location (i.e. main medical center lab, Regional Specimen Processing, etc.) in charge of the processing and proper packaging for transport of specimens to the outside reference laboratories.
	Outside Reference Laboratory Tracking Location – A specimens tracking location built in Cerner for each medical center/service area for the designated outside reference laboratory (i.e. BEL SO Quest).
Transferring/ tracking specimens to the Send Out (Pick Up) Location	• Follow the current SOP# LIS.SCPMG.004 – Transferring/Tracking Specimens on how to create a transfer list to transfer and track all outside reference laboratory specimens/orders collected and accessioned at MOB draw stations to the designated medical center lab or Regional Specimen Processing for send out/pick up by outside courier.

Continued on next page

Kaiser Permanente	SCPMG Laboratory Systems
Medical Care Program	Laboratory Information Systems
California Division – South	Procedure

Transferring/Tracking Outside Reference Laboratory Specimens, Continued

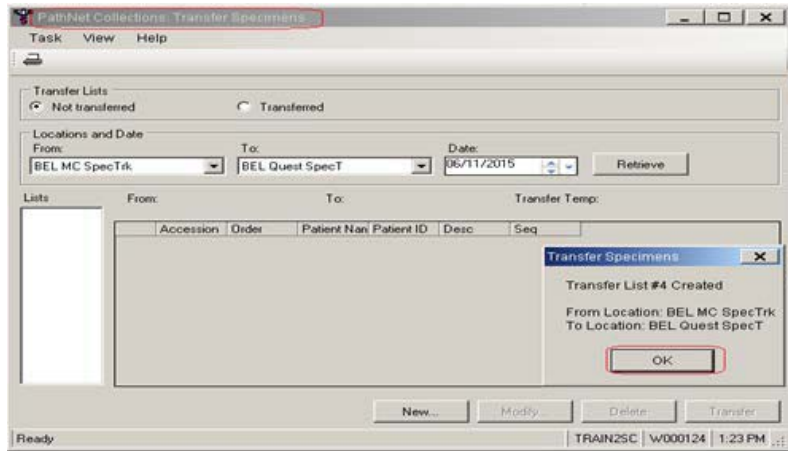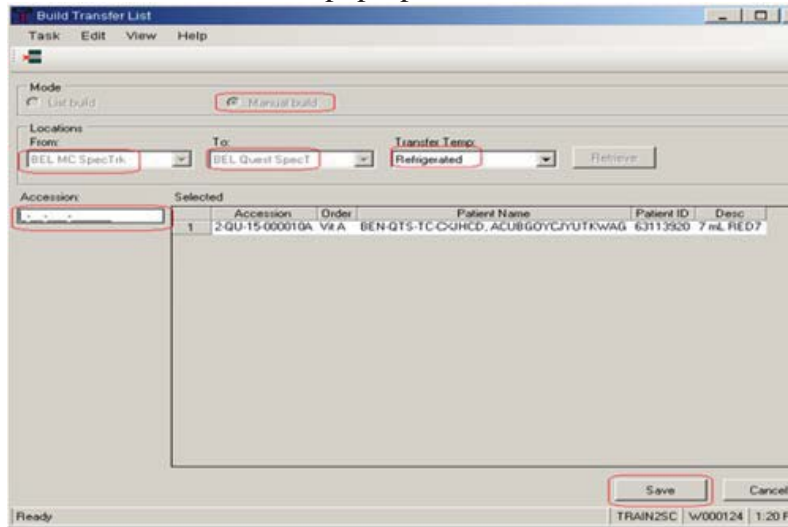|	Step	Action	Icon
Creating a Packing List to the Outside Reference Laboratory Tracking Location	1	Refer to SOP#LIS.SCPMG.003 – Logging-In Specimens in Cerner to log in all outside reference laboratory specimens received from the collection sites.	
	2	Click on the **Transfer Specimen** icon from the Applications bar (Appbar) to launch the application	
	3	Click **View** then **Options** to change to view Packing lists only and Filter by transfer temperature. Click **Save**.	
	4	Click on radio button for Not Transferred and click **New**	

Continued on next page

Kaiser Permanente	SCPMG Laboratory Systems
Medical Care Program	Laboratory Information Systems
California Division – South	Procedure

Transferring/Tracking Outside Reference Laboratory Specimens, Continued

	Step	Action	Icon

Creating a Packing List to the Outside Reference Laboratory Tracking Location, *Continued*	5	Under Build Transfer List:
		  a. Select Manual build
		  b. Select Locations
		     ○ From location is facility's MC Spec Trk (i.e. BEL MC Spec Trk)
		     ○ To location is facility's outside reference lab tracking location (i.e. BEL Quest Spec T)
		  c. Select Transfer Temp
		  d. Scan Accession number(s)
		  e. Click **Save**
		  f. Automatically returns to Transfer Specimens screen and click **OK** on pop-up information box	

Continued on next page

Kaiser Permanente	SCPMG Laboratory Systems
Medical Care Program	Laboratory Information Systems
California Division – South	Procedure

Transferring/Tracking Outside Reference Laboratory Specimens, Continued

	Step	Action	Icon

Creating a Packing List to the Outside Reference Laboratory Tracking Location, *Continued*	6	When specimens are ready to be picked up, pull up Packing List(s) by:
		    a. Launch **Transfer Specimen** application
		    b. Select "Not Transferred" radio button
		    c. Input From/To locations
		    d. Input date
		    e. Click **Retrieve**	

	7	Click **Transfer** button to Transfer Packing List – this action will allow:
		    a. Printing of the Packing List – Per local laboratory policy, list may be used by outside courier (i.e. Quest) to initial and document specimens pick up. Retain documentation if applicable.
		    b. Sends the outbound orders message over the interface to Quest, updates order status to In Transit
		        o Click **Yes** on Pop Up
		        o Select Printer
		        o Click **OK**	

Continued on next page

Kaiser Permanente	SCPMG Laboratory Systems
Medical Care Program	Laboratory Information Systems
California Division – South	Procedure

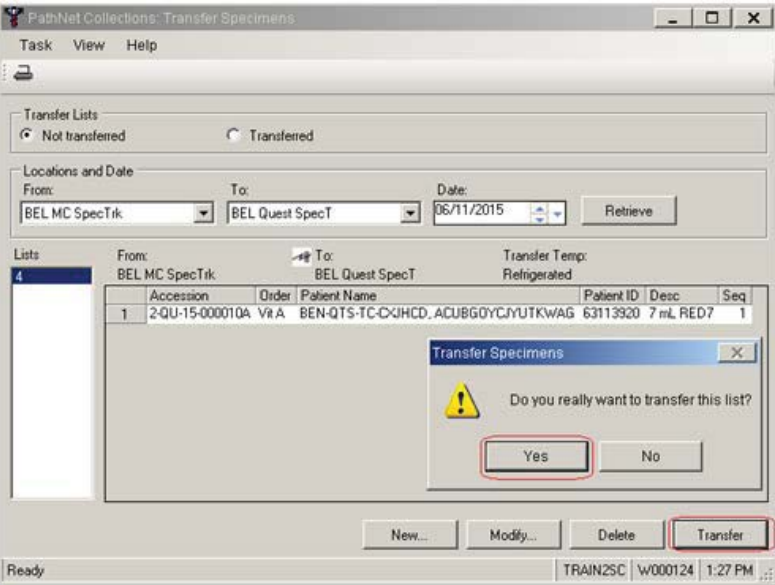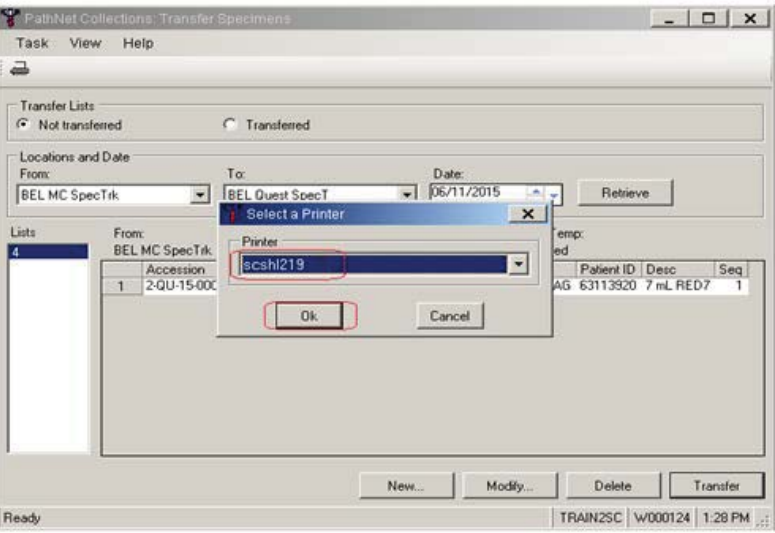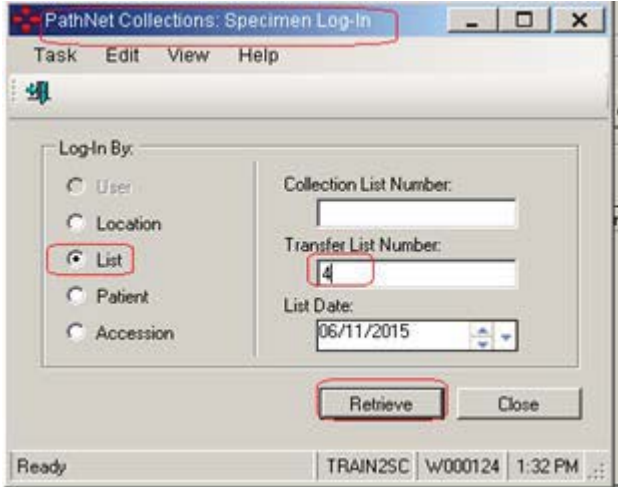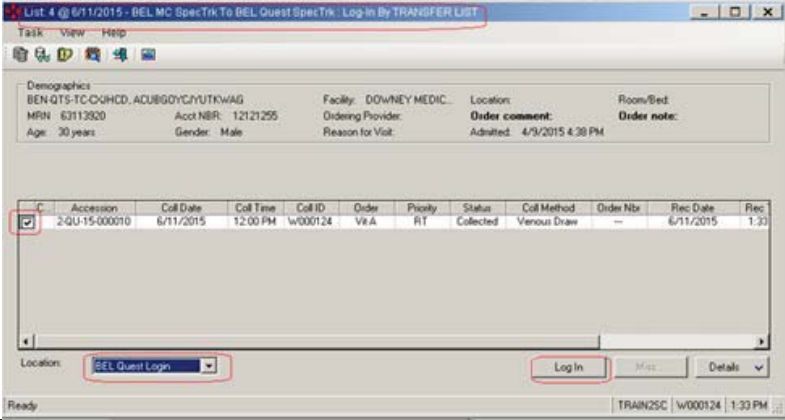# Transferring/Tracking Outside Reference Laboratory Specimens, Continued

Creating a Packing List to the Outside Reference Laboratory Tracking Location, *Continued*

Step	Action	Icon
8	Refer to the section below to log in the entire Packing List to the facility's outside reference laboratory Login location (i.e. BEL Quest Login) IMMEDIATELY AFTER the specimens have been physically picked up by the outside courier. This will trigger the order status to In Lab in Cerner and In Process in KPHC and provides a documented timestamp when specimens have been physically picked up by outside courier and its waiting for results.	

Continued on next page

Kaiser Permanente	SCPMG Laboratory Systems
Medical Care Program	Laboratory Information Systems
California Division – South	Procedure

Transferring/Tracking Outside Reference Laboratory Specimens, Continued

	Step	Action	Icon

Logging In Packing List to the Facility's Outside Reference Lab Login Location	9	Launch **Specimen Log In** application
		   a. Select List for Log-In By:
		       ○ Enter Transfer List Number created above
		       ○ Enter List Date
		       ○ Click **Retrieve** button
		
		   b. Specimen Log-In by Transfer List page opens
		       ○ Make check mark by all specimens
		       ○ Change log in location to facility's outside reference laboratory Login location (i.e. BEL Quest Login)
		       ○ Click **Log In** button	

Continued on next page

Kaiser Permanente	SCPMG Laboratory Systems
Medical Care Program	Laboratory Information Systems
California Division – South	Procedure

Transferring/Tracking Outside Reference Laboratory Specimens, Continued

Controlled Documents

The following controlled documents support this procedure.

Regional Parent Document Reference Number: SCPMG-PPP-0103 Rev. 02

Procedure
Logging-In Specimens in Cerner
Transferring/Tracking Specimens

Author   Marian Azuma

Signature Manifest

Document Number: SBMC-PPP-0523   **Revision:** 02

Title: Transferring/Tracking Outside Reference Laboratory Specimens

Effective Date: 08 Nov 2018

All dates and times are in Pacific Standard Time.

Review: SBMC-PPP-0523 02 Transferring/Tracking Outside Reference Laboratory Specimens

Review

Name/Signature	Title	Date	Meaning/Reason
Janice Wolf (K119893)	Director Operations Area Lab	05 Oct 2020, 11:54:45 AM	Reviewed
Qiyamaa Portillo (K237031)	Assistant Director Operations	07 Oct 2020, 03:31:34 PM	Reviewed