



KAISER PERMANENTE®

DOCUMENT NUMBER: RL TS Doc/Records - 0002
DOCUMENT TITLE: Reports in the Cerner Computer System
DOCUMENT NOTES: <div style="border: 1px solid purple; padding: 5px; display: inline-block; margin-left: 400px;">Most of this is review. I have highlighted areas that are good reminders</div>

LOCATION: SCPMG-dft	VERSION: 4.1
DOC TYPE: SCPMG PPP	STATUS: Draft

EFFECTIVE DATE: 02 Nov 2020	NEXT REVIEW DATE:
RELEASE DATE:	EXPIRATION DATE:

AUTHOR: G938509	PREVIOUS NUMBER: KQE: 9. 2-2-0101.03
OWNER: G938509	CHANGE NUMBER: SCPMG-CR-0651

Reports In The Cerner Computer System

Purpose This procedure will describe how to generate and review reports in the Cerner Millennium system for Transfusion Service testing and product management.

Policy

- Daily Reports shall be printed and reviewed each day.
- All test results on the pending inquiry list must be brought to final resolution within 3 days.
- Weekly reports shall be printed and reviewed each week. The maximum interval for weekly reports is 8 days.
- Monthly report shall be printed and reviewed each month. The maximum interval for the monthly report is 32 days.
- Any finding that may affect patient safety or product safety, purity and potency must be investigated, resolved, and brought to the manager or designee's attention as soon as possible.
- All products must ultimately have a record of final disposition of either transfused, disposed, or returned to supplier (shipped).
- Reports must be printed and reviewed with at least the following frequencies. Local protocol may require more frequent reviews.
- Verification of reports being printed and reviewed shall be tracked on either a local form or the regional form titled *Cerner Reports*

"LA BBT S" "all pending" at end of each shift. MUST investigate all samples that were collected in outpatient location and not received in a timely manner. All RBC orders must be completed when performing XM. All product orders should be completed after assigning to patient.

DAILY REPORTS

Activity to Monitor	Report Name	Comments
Patient Testing	Pending Inquiry	Manual & Automated Benches (May be run at each change of shift, per local protocol)
Patient Testing	BB Exception Condensed	Overrides of system rules
Patient Testing	Patient Results Correction Report	Correction of released result
Product Management	Batch Crossmatch Release Report	List of products automatically updated from crossmatched to available status.

Reports In The Cerner Computer System, Continued

Policy-con't DAILY REPORTS-CONTINUED

All RBC expiring in 10 days must be submitted for return/reissue in Blood Hub

Use appropriate dispose reason (modify, supplier credit, etc)

PHYSICALLY count units

Activity to Monitor	Report Name	Comments
Product Management	Unit Status Report OR Inventory Search for specified products	List of products that will be expiring within 10 days
Product Management	Expired Unit Report OR Inventory Search for specified products	List of products that have expired to verify correct status is disposed. Recommend date range of prior day.
Product Management	BB Inventory Report (Summary Report all product types) OR Inventory Search for specified products	Count or list of available, assigned, crossmatch, and unconfirmed products in system. Reconcile counts or listing with physical inventory.
Product Management	Batch Transfusion Report	List of all products that have been updated to a "transfused" status by the system

PH Prophylaxis (GY)

WEEKLY REPORTS

Activity to Monitor	Report Name	Comments
Product Management	Product result correction report	Correction of product result
Product Management	Product Correction Report	Correction of a product status or attribute.
Patient and Product Management	Product dispensed to unknown patients	List of products released in emergency dispense and not reconciled to a known patient
Product Management	BB Quarantine Report	List of products in quarantine

Reports In The Cerner Computer System, Continued

Policy-con't **MONTHLY REPORT**



Activity to Monitor	Report Name	Comments
Product Management	BB Inventory Report (Detail report, all product types)	List of available, assigned, and crossmatched products for location specified.

Procedure


- Follow the guides below to print and review the daily, weekly, and monthly reports.
- Retention requirements for the daily, weekly, and monthly reports are listed.
- As needed reports can be printed for informational use or investigations.

Printing reports

To print reports from the Cerner system, follow the instructions below

Pending Inquiry 	<ul style="list-style-type: none"> • Type the first 3 letters of your facility and select your facility for the Test Site Field. • Click the ellipsis button or press <Enter> • Select the 4 piece pie function that has your facility and CA_TS and click OK • Click on Print pending list • Click on Print set up to identify the printer • Print window opens, click on OK to print all pending.
Report Selection: 	<ul style="list-style-type: none"> • Click on Report Selection • Select the Report you want printed from the Select Report dropdown or use scroll bar to find the report. • Select the Inventory Owner Area (some reports will not select by inventory area even if you select this). • Select the date range – From To • When completed, press the Print icon on the upper left on the top tool bar or press the Task option and select print.





Reports In The Cerner Computer System, Continued

<p>Explorer Menu</p> 	<ul style="list-style-type: none"> • Open Explorer Menu • Double click Main Menu • Click on Blood Bank Reports (Do not select the individual reports located at the bottom of the menu, those are older reports that have been run and may not be current) • Double click on the appropriate report • On the “output to File/Printer/MINE – do not put anything. • Enter date range and owner area as listed in the top right of the form • Click on Execute on the lower right of the form. • Click on Print to print the report. <ul style="list-style-type: none"> ○ To transfer to an Excel spreadsheet, have a spread sheet open, and click on Edit on the upper toolbar. ○ Click copy ○ Move your cursor to the spread sheet you want to copy into and press the “Paste” icon or press down the Control (<Ctrl>) key and press the “v” key. The sheet will populate with the data. ○ You can adjust the columns and headings as you wish. • In the upper left tool bar select “Task” and exit the report.
--	---

Reports In The Cerner Computer System, Continued




DAILY REPORTS

retention is indicated
 on our report form

Report Name	Description and Review Items	Report generated from	Retention of Report
Pending Inquiry	<p style="text-align: center;">"all pending"</p> Verify pending tests with "In Lab" status not yet completed are queued for testing. All tests on the pending inquiry list with must be brought to final resolution within 3 days. see notes above	Pending Inquiry  Test Site Lookup: Location Name, BBTss Status: In-Lab	Do not need to retain.
BB Exception Condensed	Review each exception and override reason. If acceptable write "OK", and a brief explanation per local protocol. If not acceptable write "Not OK" and report to manager or designee. A Quality Improvement Monitor (QIM) report shall be completed for all exceptions not following current policy.	Explorer Menu  From prior day 00:00 To prior day 23:59	10 years
Patient Result Correction Report	Review all corrected results in Cerner with patient PPI and prior results. File QIM report if patient safety has been affected (wrong blood type transfused, Rhogam mis-administration, etc.)	Report Selection  Service Resource:	10 years
Batch Crossmatch Release Report	Pull units from crossmatch inventory, cut off transfusion tags, place units in available inventory shelf. <ul style="list-style-type: none"> Inform manager or designee of any units not physically located, they may have been physically dispensed but not documented in Cerner. 	System initiated report, automatically prints.	Do not need to retain
Unit Status Report	A list of products that have expired in a selected date range (Current date thru 10 days forward). These products are "shortdated" and should be managed per local protocol.	Report Selection  From Today 00:00 To 10 days prior 23:59	Do not need to retain

return/reissue RBC





Reports In The Cerner Computer System, Continued**DAILY REPORTS-Con't**

Report Name	Description and Review Items	Report generated from	Retention of Report
Short Dated Units-10 days (not a true report but a date specific inventory search)	<p>Search on Active states of Assigned, Available and Crossmatched, with 10 days to expire-all products for specified location.</p> <p>This can be sorted by column prior to printing.</p> <p>Per local protocol advise staff of expiring products.</p>	<p>Inventory Search Function</p> 	Do not need to retain
Expired Unit Report	<p>A list of products that expired in the specified date range.</p> <p>Any units listed must be located and updated to disposed status in Cerner</p> <p>Correct dispose reason</p>	<p>Report Selection</p>  <p>Select Blood Bank owner & date range of prior day or greater past date range</p>	Do not need to retain
BB Inventory Report	<p>Summary Report: Returns a product count of all Available, Assigned, Crossmatched and Unconfirmed products by product category. A daily reconciliation of the counts assures all product statuses have been updated appropriately.</p> <p>physically count</p>	<p>Explorer Menu</p>  <p>Select Inventory Owner, Product Category (all), and Report Type (Summary)</p>	Do not need to retain


Reports In The Cerner Computer System, Continued**DAILY REPORTS-Con't**

Report Name	Description and Review Items	Report generated from	Retention of Report
Batch Transfusion Report	<p>Reconcile with Dispense Packing List (generated by system at dispense) and Transfusion Order/Blood Release Verification Form (BRVF)</p> <ul style="list-style-type: none"> Review records to determine if pathologist notification is required for Rh negative patients receiving Rh positive RBCs and/or platelets. Refer to "<i>ABO and Rh Selection for Blood Component Orders</i>" <p>Review the Batch Transfusion Report:</p> <ul style="list-style-type: none"> All products under column of "Current Status" are "Transfused" <p>Call Informatics to resolve if units are not in transfused status or any other error messages noted on report.</p> <p>NOTE: If this report does not print (i.e. printer jam), it cannot be re-printed.</p> <ul style="list-style-type: none"> Generate the "Transfusion Log" Report found in Report Selection to reconcile with Dispense Packing List Manually check each product in Cerner to verify it was updated to "transfused" status Report products found in un-transfused status to manager or designee 	<p>System initiated report, automatically prints.</p> <p>Performed by GY using transfusion log</p>	<p>5 years if corrective action is required</p>

Reports In The Cerner Computer System, Continued**WEEKLY REPORTS**






Report Name	Description and Review Items	Report generated from	Retention of Report
Product Result Correction Report	Review all corrected product results in Cerner. File QIM report if patient safety has been affected	Report Selection  Select Blood Bank owner and date range of prior week	10 years if corrective action is required
Product Correction Report	List of corrected/updated product status, demographics (locations, expirations etc) and attributes within the specified date range. Includes correction type. File QIM report if patient safety has been affected	Report Selection  Select Correction type: Select Blood Bank owner and date range of prior week	10 years if corrective action is required
Products Dispensed to Unknown Patients	A report listing all products assigned in the emergency dispense mode and not yet associated with a patient. Reconcile product to correct patient.	Report Selection  Select Blood Bank owner	10 years if corrective action is required
BB Quarantine Report	If unit(s) is not released from Quarantine, locate unit physically and resolve unit(s) to a final disposition-discard or return to supplier.	Explorer Menu  Select Blood Bank owner and date range of prior week	Do not need to retain

MONTHLY REPORT







Report Name	Description and Review Items	Report generated from	Retention of Report
BB Inventory Report	Detail Report lists all products in Available, Assigned or Crossmatched status. Expired products which were not appropriately updated to a discard status have "EXPIRED" printed in the far left	Explorer Menu  Select Inventory Owner, Product	Do not need to retain

Reports In The Cerner Computer System, Continued







	column. A weekly reconciliation of DINs listed (unit numbers) assures no errors in product management activities.	Category (all), and Report Type (Detail)	
--	---	--	--

List of Available Reports to generate as needed:	
Name of Report	Description/Use
BB Final Disposition 	Listing of final disposition status (modified, disposed or transfused) of products in specified date range. Note: This report is available in iLab also, with extended information (Pateint Name, DOB etc).
BB Utilization Report 	Summary of products received and transfused for specified date range
BB Dispose Report 	Data collection purposes only.
BB Tx Rxn Report 	Data collection purposes only.
Autologous Directed Persons Not Combined 	A report of all persons for whom autologous or directed blood was received who have not yet been combined with actual registered patients. When the blood was received, they were simply entered as persons, not as registered patients
Autologous/ Directed Units Report	A report of all autologous or directed blood not yet in a final status.




Reports In The Cerner Computer System, Continued

List of Available Reports to generate as needed:	
Name of Report	Description/Use
	
Component Report 	A report of all products created by modification using Modify Products. This report prints only newly created products with an option of New Products, Split, or Crossover (these options are selected in Modify Tool). If the Change Attribute option is selected, that product will not be printed.
Inventory Activity Report 	A report that lists, by product type and with a cumulative total for all product types, the number of products received, assigned crossmatched, dispensed, transfused, disposed, and destroyed during a specified date range. Transfused or destroyed products from a historical upload are included in the counts.
Locked Units Report 	A list of all defined blood bank corrections performed from Correct Inventory during the specified date range. Each correction is split into a separate report. You can select a specific correction type to print.
Patient Results Activity Report 	A list of either performed or performed and verified results for blood bank tests during the specified date range. This report is sorted by test site.
Patient Typings and Comments 	A list of patients with a blood group, Rh type, antibodies, transfusion requirements, and blood bank comments.
Pooled Products Report	A list of all blood bank products that have been created through pooling during the specified date range.

Reports In The Cerner Computer System, Continued

List of Available Reports to generate as needed:	
Name of Report	Description/Use
	
Product Results Activity 	A list of either performed or performed and verified results for blood bank products during the specified date range. A specific service resource can be selected for which to print the report.
Summary of Products Received 	Select the date range. It is then tallied by ABO type and volume.
Summary of Shipped and Transferred Products 	Shows products that are in Shipped or In transit state by specified date range and bb owner area.
Transfusion Committee Report 	The Transfusion Committee report lists all blood product transfusions with associated pre- or posttransfusion testing laboratory values (i.e. Hgb, INR, platelet count) also are included. Unable to export in CSV or excel format. A similar report may be available thru iLab.
Transfusion Log 	A detailed list of transfusions that occurred during the specified date range. Products from a historical upload also are displayed on the report if transfused during the selected date range. An asterisk (*) is displayed immediately to the left of the product number for uploaded products. A footnote at the bottom of the page corresponding to the asterisk states from product history upload.

Reports In The Cerner Computer System, Continued

List of Available Reports to generate as needed:	
Name of Report	Description/Use
BB Inventory Report 	Lists all products in inventory over a time period by detail for each unit, or by Summary, which is a total number of products. Plasma summary will not differentiate between FFP and CPP, so the detailed report will be better.
BB Final Disposition 	All products that were modified, transfused, destroyed during a time period. Good for statistics and details on disposed units. A similar report may be available from iLab.
BB Utilization Report (Auto Only) 	Autologous utilization summary
Transfusion Form	Prints when assignment or crossmatch of product is completed. Also called transfusion tag. Attached to product for beside identification.
Dispense Packing List	Prints with all dispense. Keep at least 24 hours and reconcile with Batch Transfusion Report.

Authors All SCPMG Transfusion Service Managers
Regional Blood Bank Compliance Officer

Controlled Documents

- Cerner Reports Form
- ABO and Rh Selection for Blood Component Orders

Uncontrolled Documents

- Fung, Mark K. Ed. Technical Manual, 19th Ed. AABB
- AABB Standards, current ed.
- CAP Requirements, checklist, current

Distribution All SCPMG Transfusion Services