

Beaumont

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Reviewing Epic Beaker Outstanding and Expected Lists - Blood Bank

Document Type: Procedure

I. PURPOSE AND OBJECTIVE:

This document describes the steps for blood bank staff to review and resolve pending patient tests on the Epic Beaker Outstanding and Expected Specimen lists.

II. DEFINITIONS:



- A. Epic: Hospital information system (HIS) where nursing staff and clinicians view laboratory results, among other items.
- B. Epic Beaker (Beaker): Laboratory information system where laboratory staff orders, enters, and results laboratory tests. Only laboratory staff have access to Beaker.
- C. TAT: Turn around Time

III. POLICY:

- A. The Outstanding List report must be reviewed by each shift, at the beginning and end of the shift. The Blood Bank staff is responsible for making sure that all pending tests are investigated and resolved.
- B. The Expected List report must be reviewed by each shift, at the beginning and end of the shift. The Blood Bank staff is responsible for making sure that all missing or lost specimens are located and resolved.

IV. PROCEDURE:

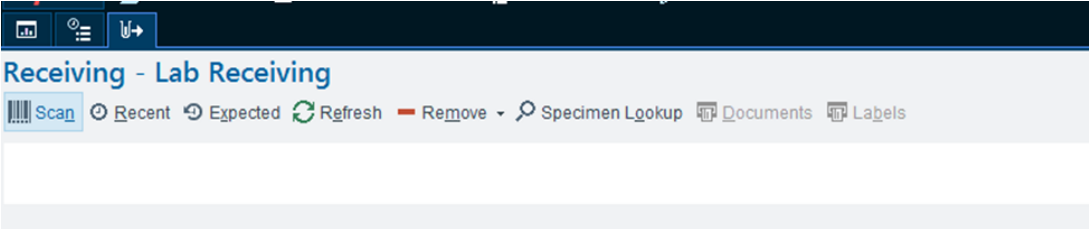
A. Reviewing the Outstanding List

1. Log in to Epic and select the appropriate "Job" and "Department", when prompted. Laboratory staff will be automatically be directed to the Beaker home screen.
2. Click the  or type "Outstanding List" in the Beaker search field on the upper right of the screen.
3. If the correct report is not automatically displayed click the  Views ▾ button and scroll to the appropriate report (e.g. Dbn Blood Bank, FMH Blood Bank etc.) on the left side of the screen.
4. Highlight the desired report and press [ENTER].
 - a. This report will include any results for the lab location and department selected that are not verified.
5. Review each order on the report with specific attention to the Priority, TAT and Request Date/Time Columns.
 - a. Investigate any STAT order that has a request time that is more than 1 hour from the current time.
 - i. Confirm physical receipt of specimen in the department and verify that testing has been initiated.
 - b. Investigate any Routine order that has a request time that is more than 4 hours from the current time.
6. Further investigate the reason for any specimen (> 2hr for STATS, >4 hours Routine) with results still pending:
 - a. Verify that the order has been successfully received and transmitted to Soft Bank.
 - b. If the order is received in Soft Bank and appears on Soft Bank pending, complete the actions as detailed in Transfusion Medicine Policy, [Reviewing the Soft Bank Pending Tests Report](#).
 - c. If the order does not appear on the Soft Bank pending
 - i. Receipt Status: Verify whether the specimen has been physically received in the department.
 - a. Verify Packing List status for specimens in transit from Patient Service Centers or other blood banks.
 - b. If necessary update the receipt status in Soft Bank using Patient/Order/Modify.
 - ii. Duplicate Order: If it is determined to be a duplicate order cancel the order in Beaker using [Blood Bank CDM, Cancelling Orders in Beaker](#).
 - iii. Interface Issue: Attempt to resend specimen results from Soft Bank to HIS. If does not resolve open a Help Desk Ticket. Notify Lead Medical Technologist or Supervisor for additional follow up.
7. Complete the actions listed above until the outstanding list for the site has been resolved.

B. Reviewing the Expected List

The **Expected List** finds orders that have been collected but not received in BEAKER.

1. Click on **Receiving** in Beaker then Click on **Expected**.



3. Right click on tests column to Filter by the tests you are looking for. Example: TS

Question#	Received	Specimen	Patient	Tests	Specimen Collection Department	List	Destination Lab	Ctnrs Scan	High Prior	Flag
		22RO-129CM0127	Walker, Charmita	ICNG	COMPREHENSIVE OBGYN RE...		BLFMH	1		
		22FH-129CH0303	Xxx, Ro Lab Demo	LYTES			BLFMH	1		
		22RO-129CH1352	Xxx, Ro Lab Demo	AHPT			BLFMH	1		

4. If the test is not there than nothing is collected but not received for that test.
5. If the test is there, any patient that are collected but not yet received at the destination lab appear.

Tests	Specimen Collection Department	List	Destination Lab	Ctnrs Scan	High Prior	Flag	Comment	Coll Date	Coll Time	Testing Section
TS	ESSENTIAL GYN AND OBSTET...		BLFMH	1				05/10/2022	9:53 AM	FMH Blood Bank
TS	ESSENTIAL GYN AND OBSTET...		BLFMH	1				05/10/2022	12:12 PM	FMH Blood Bank
TS	ESSENTIAL GYN AND OBSTET...		BLFMH	1				05/10/2022	1:34 PM	FMH Blood Bank

6. Review the expected list and initiate a SWARM alert for any specimen greater than 24hrs not yet received. Refer to laboratory policy, [Swarm Alerts: Missing or Lost Specimens](#).

Approval Signatures

Step Description	Approver	Date
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