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RELEASE DATE:	EXPIRATION DATE:

AUTHOR:	PREVIOUS NUMBER:

OWNER:	CHANGE NUMBER:

Use of the SmartShip WebApp

Purpose This procedure provides instructions for utilization of the SmartShip WebApp in generating SmartShip Labels and tracking of different types of specimen transportation packages between Kaiser Permanente Southern California Medical Center Service Areas and SCPMG Regional Reference Laboratories (RRL).

Adherence to this procedure ensures that appropriate specimen transports are monitored and maintaining specimen integrity.

Scope This procedure is intended for SCPMG Laboratory Care Delivery System staff who oversee or are responsible for processing, packing, transporting, and receiving specimens between Kaiser Permanente Southern California Medical Centers, Medical Office Buildings, and Regional Reference Laboratories.

Policy
- SmartShip location placard must be visibly displayed in pickup/delivery area of each lab.
- Every tote being shipped requires a new SmartShip Label, which contains a unique tracking ID. Duplicates/copies shall **NOT** be used.
- SmartShip Labels must be created when tote/package is ready for pick-up (**DO NOT** print labels in advance).
- SmartShip Label must be inserted into tote window with address of receiving laboratory and barcode visible.
- Laboratory staff are to provide NUID and signature acknowledging number of totes to be picked up and delivered.
  - If courier has both a pickup and delivery at the same time, Laboratory staff will be required to sign twice, once for each transaction.
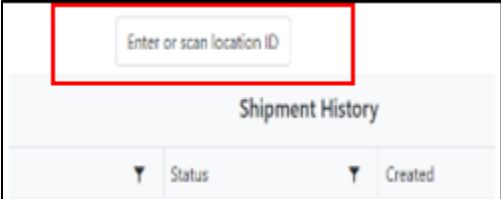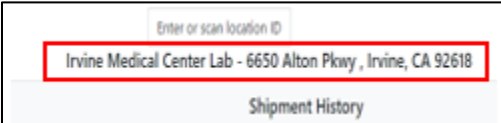
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Use of the SmartShip WebApp, Continued

Before you begin

- The SmartShip WebApp continuously updates the status of shipments and is managed by the SCAL Regional Laboratory Couriers (Integrated Transportation Services (ITS) department) for the Laboratory Care Delivery System
  - Additional information for this department and services provided (schedules, contact information) are found on LabNet.
- Contracted courier services (contracted by ITS or directly by a local laboratory) cannot scan SmartShip Labels
  - For contract courier services, Laboratory staff will scan for shipments as delivered
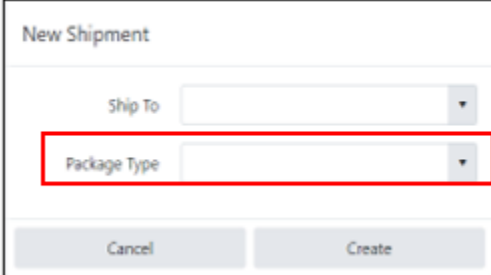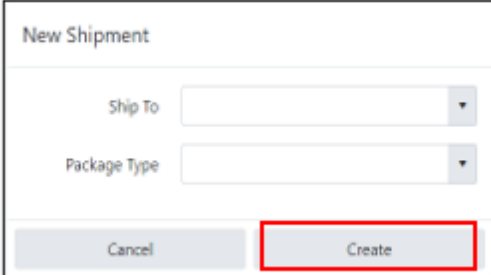
Procedure- Create Shipment
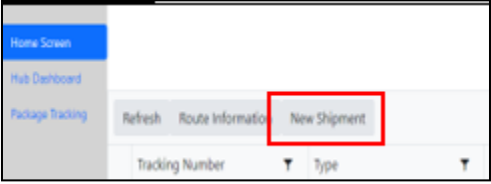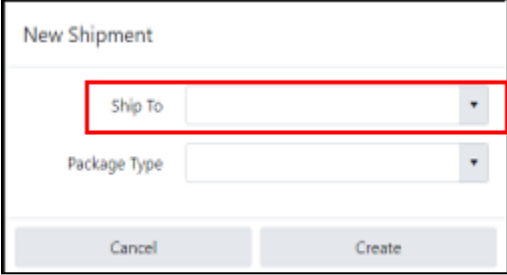
Follow the steps below to create a shipment tracking label using the SmartShip WebApp. Steps also describe how to cancel shipments and reprint shipment tracking label.

Step	Action
1	Go to SmartShip Website or Access via LabNet https://kaiser.pactrac.net/KPCourier/Identity/Account/Login
2	Enter your NUID and Password, click ***Log In*** button • If you forgot your password, click ***Forgot your password***
3	Click in box labeled (***Enter or scan location ID***) and scan location ID using laminated sheet or manually enter location ID Enter or scan location ID Shipment History ▼ Status ▼ Created Lab name and address will be displayed, along with shipment history for the location Enter or scan location ID Irvine Medical Center Lab - 6650 Alton Pkwy , Irvine, CA 92618 Shipment History

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Use of the SmartShip WebApp, Continued

	Step	Action
Procedure-Create Shipment, continued	4	Click new shipment button
	5	Select the destination from the **_Ship To_** drop down list:
	6	Select the appropriate package (tote) type from the **_Package Type_** drop down list
	7	Click the **_Create_** button to continue or Cancel if you need to correct entries for shipment

Use of the SmartShip WebApp, Continued

	Step	**Action**
Procedure-Create Shipment, continued	8	The SmartShip Label will open in a separate window. *For Specialty Regional Laboratory Locations, please see Appendix for examples of proper label creation (i.e Genetics, BT/Flow Cytometry, and Cytology)* *Print* SmartShip Label with the **unique tracking number** assigned for shipment (tote) **<u>DO NOT</u> pre-print labels. ONLY print a delivery label when shipment is ready for pick-up* ***Pre-printing labels will alert courier to pick up every single delivery label generated even if no shipment is prepared**

Use of the SmartShip WebApp, Continued
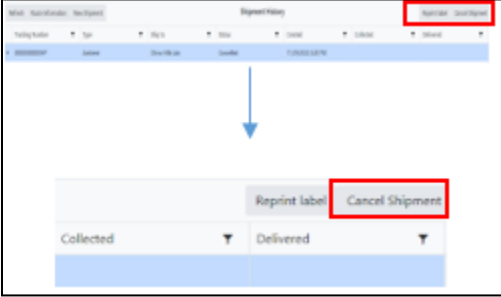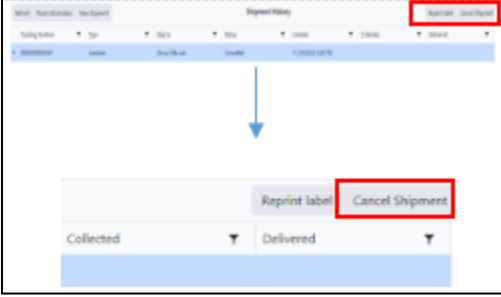
Procedure-Create Shipment, continued

Step	Action
9	Fold label and place the top half of the label, face up in the tote/package label window. The barcode and delivery information must be visible for the courier to scan. ***Fold in Half (see below: This section to be visible on shipment)***
10	Bottom half of Smartship label will **<u>ONLY</u>** be completed in the event of a system failure- **Refer to Contingency Plan for System Failure section below for more details*

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Use of the SmartShip WebApp, Continued
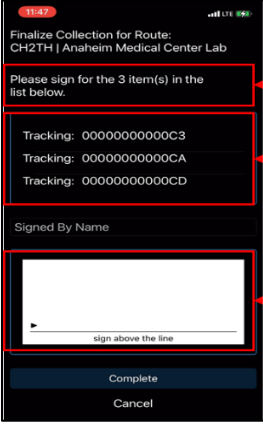
	Step	Action
Procedure-Create Shipment, continued		* Follow the steps below to cancel a shipment or reprint a Smarthip Label using the SmartShip WebApp
	11	Click the row for the shipment (it will be highlight in blue to indicate selection), then click *Cancel Shipment* or *Reprint Label*
	12	The **Cancel Shipment** button will change the status to Cancelled. The courier will not be able to pick up a package in cancelled status. *Please Note: Both Cancel and Reprint functions are only available when the Status is "Created". The buttons will be greyed-out/non-functional in any other status*
	13	The **Reprint label** button can be used to reprint a SmartShip Label in the event it is damaged/torn before picked up by the courier. *This function should not be used to print duplicate shipping labels; each package/tote requires a unique tracking number.*

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Use of the SmartShip WebApp, Continued

Procedure-Pickup and Delivery

Follow the steps below to document the pickup and/or delivery of shipments by the courier

Step	Action
1	Upon arrival to the lab, the courier will scan the location laminated barcode placard • Please ensure placard is accessible for courier in designated pick-up/drop-off areas
2	The courier will then scan the barcode on the SmartShip Label on the totes/packages being collected and/or delivered. • If there are packages to be collected and delivered at the same time, the courier will perform 2 separate transactions on their phone, once for the collection and once for the delivery. Laboratory staff will be required to sign twice, once for each transaction (collection and/or delivery)
3	Courier will ask the laboratory staff for their NUID, then present the phone for a signature (use finger or stylus to sign).
4	In the event that the location is closed (laboratory staff not present) courier will not be required to obtain a signature from laboratory staff. • Laboratory should follow local processes to determine/verify that staged totes have been picked up by courier.

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Use of the SmartShip WebApp, Continued
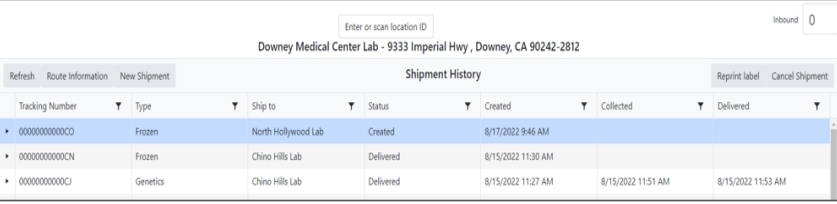
Procedure-Tracking and Shipment History
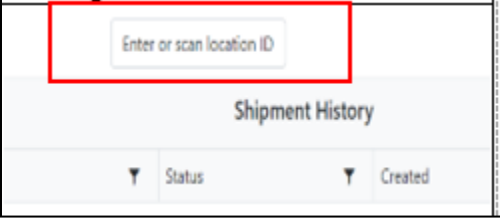
Follow the steps below to view the package tracking status and view shipment history in the SmartShip Web App

Step	Action
1	Use the Package Tracking function to: • View packages shipped from any location by tracking number • Print a Proof of Delivery document Click **Package Tracking** on the left side menu ***See definitions for Activity and Status in Table Below***

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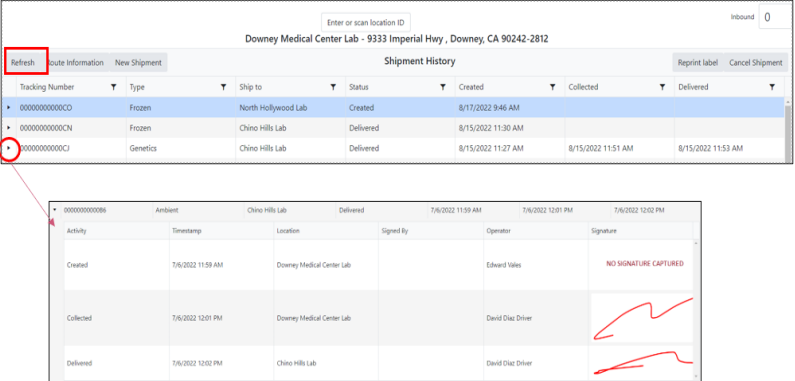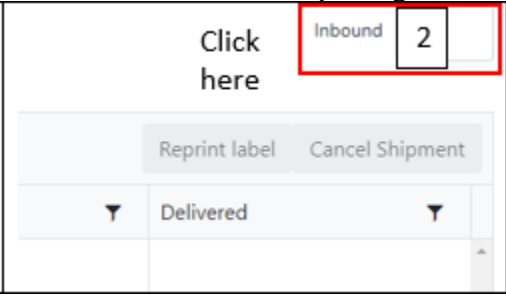# Use of the SmartShip WebApp, Continued

	Step	Action
Procedure-Tracking and Shipment History, continued	2	Use Shipment History to view status by location code: Click in box labeled *(**Enter or scan location ID**)* and scan location ID using laminated sheet or manually enter location ID • Each location's shipment history will be displayed on the Home Screen for 30 days, sorted by Created date from newest to oldest. • Shipments older than 30 days can be viewed on the Package Tracking screen (*See Step 1*)
	3	Status for shipments in progress will update until delivery is complete. • System will refresh every 30 seconds

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Use of the SmartShip WebApp, Continued

Procedure-Tracking and Shipment History, continued

Step	Action
4	To view additional detail, click the triangle to the left of the tracking number to expand the row
5	If any packages are being shipped to your location from a another location, you will see a package count appear in the **Inbound** box in the upper right portion of the screen.
6	To view detail on the inbound packages, click once on the inbound number and the package detail screen will appear. (Screenshot of package detail screen)

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Use of the SmartShip WebApp, Continued

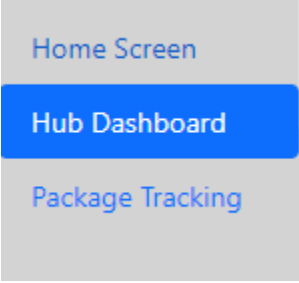|	Step	Action
Procedure-Tracking and Shipment History, continued	7	Refer to the Tables below for definitions for package tracking:

Activity records each transaction of the shipment from creation to delivery, with date/timestamp and name of the operator.

Activity Name	Definition
Created	SmartShip Label has been created
Cancelled	Shipment was cancelled
Collected	Courier has collected the package
Home Staged	Shipment from an MOB staged at home Medical Center for pickup by Regional Courier
Relay Staged	Shipment is staged at one of the Regional Labs for pickup by Regional Courier to be delivered to another lab
Delivered	Shipment delivered to final destination
*(MANUAL)	The word "Manual" next to the activity name indicates that a transportation dispatcher, supervisor, or lab staff has updated the status of the package

Status indicates the current state of the package in real time

Status Name	Definition
Created	SmartShip Label has been created
Cancelled	Shipment was cancelled
In Transit	Shipment in possession of courier and being transported
Delivered	Shipment delivered to final destination

Use of the SmartShip WebApp, Continued

Procedure-HUB Dashboard (RRL)

Follow the steps below to view the Hub Dashboard in the SmartShip Web App

Step	Action
1	Regional Lab users will see the hub dashboard option in the left side menu. Home Screen **Hub Dashboard** Package Tracking
2	The hub dashboard will display the status of all inbound totes to a Regional Lab location for the current day. ***Counts will change as status is updated in the field. Screen will refresh every 30 seconds***
3	Refer to Table below for guidance | Status Name	Definition
New Generated Totes	SmartShip Label has been created for a tote being shipped to the Regional Lab
Totes Staged	Totes are staged for relay between Sherman Way and Chino Hills
Totes in Transit	Shipment in possession of courier and being transported
Delivered Today	Shipment delivered to final destination	
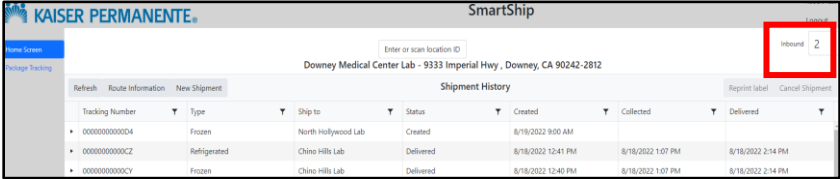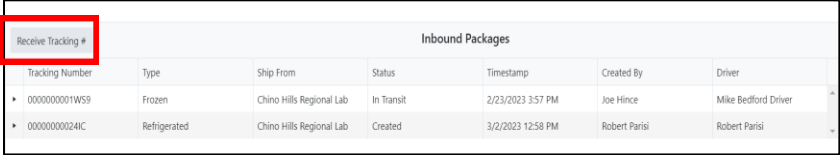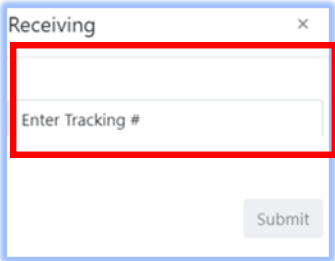
Use of the SmartShip WebApp, Continued

Procedure- Receiving Packages/Totes

The SmartShip WebApp receiving function is to be used by laboratory staff in the following scenarios:

- Any courier not using the SmartShip system (i.e Local route courier did not use iPhone to scan and obtain a laboratory staff signature)

- Package was delivered by 3rd party courier (i.e A-Line, MCI, etc)

Step	Action
1	When the courier is unable to scan inbound deliveries in the SmartShip app follow the steps below
2	Log into the SmartShip WebApp
3	Click on the **_Inbound box_** in the top right-hand corner of the screen
4	Click on the **_Receive Tracking #_** button
5	Scan/Enter the SmartShip Label barcode/number in the **_Enter Tracking #_** field

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Use of the SmartShip WebApp, Continued

	Step	Action
Procedure-Receiving Packages/Totes, continued	6	Click Submit to update package status Receiving — Enter Tracking # 0000000001WS9 — Package Status will be changed to: Delivered(MANUAL) — Submit Receiving — Enter Tracking # 0000000001WS9 — Package Status successfully updated. — Submit If an MOB tote/package for Regional Laboratories is being received at the local medical center, the Home Staged message will appear: Receiving — Enter Tracking # 00000000024ID — Package Status will be changed to: Home Staged(MANUAL) Place package in the staging area for: Chino Hills Regional Lab — Submit Receiving — Enter Tracking # 0000000001WS9 — Package Status successfully updated. — Submit

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Use of the SmartShip WebApp, Continued

Procedure-Receiving Packages/Totes, continued

Step	Action
7	If an error occurred, the following messages will display indicating the issue: • Package Status is already delivered or Cancelled • Package not allowed for delivery at this location. Please inspect the shipping label and contact courier dispatch **Receiving** ✕ Enter Tracking # 00000000024IC Package Status is already Delivered or Cancelled. Submit **Receiving** ✕ Enter Tracking # 0000000001WRC Package not allowed for delivery to this location. Please inspect the shipping label and contact dispatch. Submit

Procedure-Contingency Plan for System Failure/ Downtime
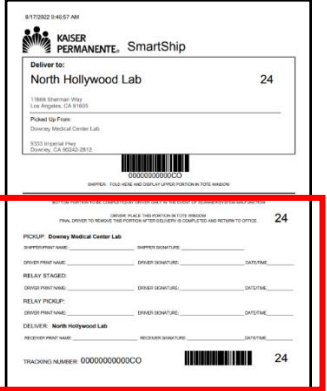
Use the table below to determine process when unable to access SmartShip WebApp

Type of System Failure	Steps
Phone or mobile application failure at Courier Dispatch	1. If failure is discovered before courier departs Courier dispatch, a backup device will be issued to courier.

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Use of the SmartShip WebApp, Continued

Procedure-Contingency Plan for System Failure/ Downtime, continued	Type of System Failure	Steps
	Desktop application working, but courier encounters phone/mobile app failure on the road	1. Courier will notify dispatch immediately to relay information to appropriate personnel. 2. Laboratory staff will generate a manual tracking tote log and fill out necessary information (i.e date, facility, tracking number information, etc.) 3. Courier and Lab Staff will sign and enter NUID on Manual Tracking tote log sheet at pickup/delivery confirming number of totes/packages and tracking numbers correspond to actual totes/packages at pickup/delivery 4. *Upon arrival at Regional Lab, courier will carefully cut or tear label at the fold line and place top half of label back in tote window.* 5. *Courier will retain bottom portion of SmartShip Label and return to dispatch along with Manual Tracking Tote log* 6. *SmartShip label will be entered as Delivered (manual) in the SmartShip webapp at HUB*

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Use of the SmartShip WebApp, Continued

Procedure-Contingency Plan for System Failure/ Downtime, continued

Type of System Failure	Steps
Desktop application failure, Labs unable to generate labels	Follow current process in the event of SmartShip WebApp system failure (i.e Use of PacTrac or other manually tracking systems)

Controlled Documents

The following controlled documents support this procedure.

Attachment A: Examples of Smart Ship Labels
Packing and Transporting of Clinical Pathology and Cytology Specimens to the Regional Laboratory
Manual Tracking Tote Log
Instructions for Use Incubator Carrier Tote
Process_LMS Specimen Tracking
Procedure_Transferring/Tracking Specimens

Non-Controlled Documents

The following non-controlled documents support this procedure.

CAP Checklists: All Common and Laboratory General
49 CFR Parts 171-180, Hazardous Materials Regulations

Authors

- Brandon Jeong
- Phillip Lansang

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Attachment A: Smart Ship Label Examples

Regional Specialty Department	*Proper SmartShip Label Example*
Genetics	

Attachment A: Smart Ship Label Examples, continued

Regional Specialty Department	*Proper SmartShip Label Example*
BT/Flow Cytometry	4/4/2023 1:41:16 PM **KAISER PERMANENTE®** SmartShip **Deliver to:** BT-Flow Cytometry Lab **60** TEST 4867 Sunset Blvd Los Angeles, CA 90027-5969 **Your MC/MOB Here** North Hollywood Regional Lab **Type of Tote** Los Angeles, CA 91605 0000000003OBJ SHIPPER: FOLD HERE AND DISPLAY UPPER PORTION IN TOTE WINDOW BOTTOM PORTION TO BE COMPLETED BY DRIVER ONLY IN THE EVENT OF SCANNER/SYSTEM MALFUNCTION DRIVER: PLACE THIS PORTION IN TOTE WINDOW. **60** FINAL DRIVER TO REMOVE THIS PORTION AFTER DELIVERY IS COMPLETED AND RETURN TO OFFICE. PICKUP: **North Hollywood Regional Lab** SHIPPER PRINT NAME: _____ SHIPPER SIGNATURE: _____ DRIVER PRINT NAME: _____ DRIVER SIGNATURE: _____ DATE/TIME_____ RELAY STAGED: DRIVER PRINT NAME: _____ DRIVER SIGNATURE: _____ DATE/TIME_____ RELAY PICKUP: DRIVER PRINT NAME: _____ DRIVER SIGNATURE: _____ DATE/TIME_____ DELIVER: **BT-Flow Cytometry Lab** RECEIVER PRINT NAME: _____ RECEIVER SIGNATURE: _____ DATE/TIME_____ TRACKING NUMBER: 0000000003OBJ **60**

Attachment A: Smart Ship Label Examples, continued

Regional Specialty Department	*Proper SmartShip Label Example*
Cytology	4/4/2023 1:42:37 PM **KAISER PERMANENTE®** SmartShip **Deliver to:** North Hollywood Regional Lab 24 11666 Sherman Way Los Angeles, CA 91605 Pick Your MC/MOB Here Cytology Irvine Medical Center Lab Irvine, CA 92618 0000000003OBM SHIPPER: FOLD HERE AND DISPLAY UPPER PORTION IN TOTE WINDOW BOTTOM PORTION TO BE COMPLETED BY DRIVER ONLY IN THE EVENT OF SCANNER/SYSTEM MALFUNCTION DRIVER: PLACE THIS PORTION IN TOTE WINDOW. FINAL DRIVER TO REMOVE THIS PORTION AFTER DELIVERY IS COMPLETED AND RETURN TO OFFICE. 24 **PICKUP: Irvine Medical Center Lab** SHIPPER PRINT NAME: _____ SHIPPER SIGNATURE: _____ DRIVER PRINT NAME: _____ DRIVER SIGNATURE: _____ DATE/TIME _____ **RELAY STAGED:** DRIVER PRINT NAME: _____ DRIVER SIGNATURE: _____ DATE/TIME _____ **RELAY PICKUP:** DRIVER PRINT NAME: _____ DRIVER SIGNATURE: _____ DATE/TIME _____ **DELIVER: North Hollywood Regional Lab** RECEIVER PRINT NAME: _____ RECEIVER SIGNATURE: _____ DATE/TIME _____ TRACKING NUMBER: 0000000003OBM 24

Signature Manifest

Document Number: RIV-PPP-1124   **Revision:** 01
Title: Use of the SmartShip WebApp
Effective Date: 26 Jun 2023

All dates and times are in Pacific Standard Time.

Pre-Analytical New Documents

Operations Director Approval

Name/Signature	Title	Date	Meaning/Reason
Annaleah Raymond (Q741709)	Laboratory Operations Director	25 Jun 2023, 06:06:06 PM	Approved

Medical Director Approval

Name/Signature	Title	Date	Meaning/Reason
Mark Taira (P161328)	CLIA Director	26 Jun 2023, 01:30:27 PM	Approved