

Beaumont

SoftExpress and SoftLab

Hey, Where's My Specimen?

Process to locate a missing specimen
from a draw site or client office.

Beaumont[®] Laboratory

Missing Specimens...

- There are several tools built into Soft Lab and soft Express to assist locating missing specimens.
- This CBT outlines the tools and systems to aid in the search for a missing specimen
- This CBT will illustrate how a missing specimen from a draw site (pre-ordered in Soft) and from a client office (traditional courier tracking) can be located.

Objectives

At the end of this classroom training module, the user will:

- Be able to discern whether the specimen missing is from a drawsite or client office
- Recognize what Soft system to search for the missing specimen
- Access Specimen Tracking in SoftLab or SoftExpress to begin a search
- Recognize what reports to pull to narrow the search based on the information provided regarding the missing specimen

Topic Overview

- Steps for Investigating
- What systems to use?
- What information can be gathered from each system?
- What does this information mean?
- Other useful tools to aid in the search.
- SWARM!!



The Search....



- Entry point for information about a missing specimen most often is Client Services.
- All available information regarding a missing specimen is taken and then the search begins
- First identified is “where” the specimen originated. Drawsite, Client Office, PSC, etc
- The “where” will dictate to the user the proper Soft system to begin the search.

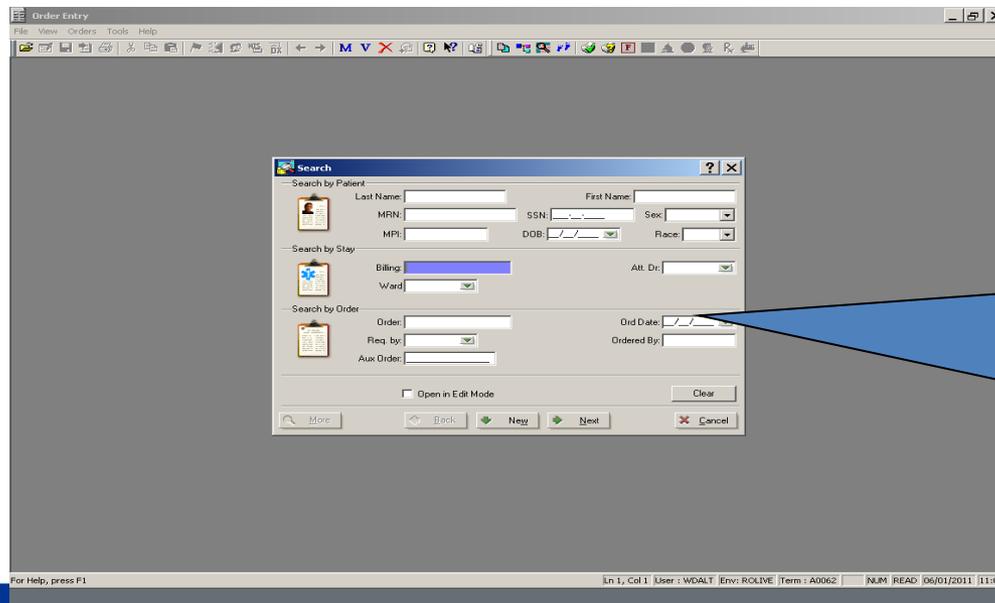
A Draw site Missing Specimen....

- A little background....Draw site specimens are ordered in SoftLab at the site.
- They are sent to the Lab already labeled, instrument ready and tracked by way of “list” in SoftLab.
- When a specimen is missing from a draw site, the first place investigated is where? You guessed it...SoftLab.



SoftLab Investigation

- Once in SoftLab, the user pulls up the information about the specimen by searching the:
- Patient First and Last Name, DOB
- Patient MRN
- Patient Order Number



Order Entry

File View Orders Tools Help

Search

Search by Patient

Last Name: _____ First Name: _____

MRN: _____ SSN: _____ Sex: _____

MFI: _____ DOB: _____ Race: _____

Search by Stay

Billing: _____ Alt. Dr.: _____

Ward: _____

Search by Order

Order: _____ Ord Date: _____

Req. by: _____ Ordered By: _____

Aux Order: _____

Open in Edit Mode

Clear

Move Back Next Cancel

For Help, press F1

Ln 1, Col 1 | User : WDALT | Env: ROLIVE | Term : A0062 | NUM READ | 06/01/2011 11:04

All these fields are searchable if you have the information

SoftLab Investigation

- Once you locate the patient and their order number you go into the order and view the Specimen Tracking for that Lab order.
- More specifically, you click on the test that is missing and note the tracking for **just that test.**

The screenshot shows a medical software interface titled "Order Entry - [Order Number (183100085) - 'Royal Oak - Read Mode]". The patient information section includes fields for Last name (DEMOSOFTEMR), first (MISYSGIPL), middle, DOB (10/24/1985), Age (25), Sex (female), and MPR (DEMOM10248500). The Specimen Tracking table shows a single specimen (1) with a missing test (SIT). The Tracking history table shows the following data:

#	Status	Location	Date	Time	Tech	Place	Comment	Received
1	Received	Receiving	05/31/2011	13:00	WD.	GSFR		
2	Collected	Collection Center	05/31/2011	13:00	WD.	GSFR		
3	Ordered	Ordering Location	05/31/2011	13:00	WD.	GSFR		

A yellow callout bubble with a red border points to the Tracking history table, containing the text "Here's Tracking !!".

SoftLab Investigation

Tracking history:

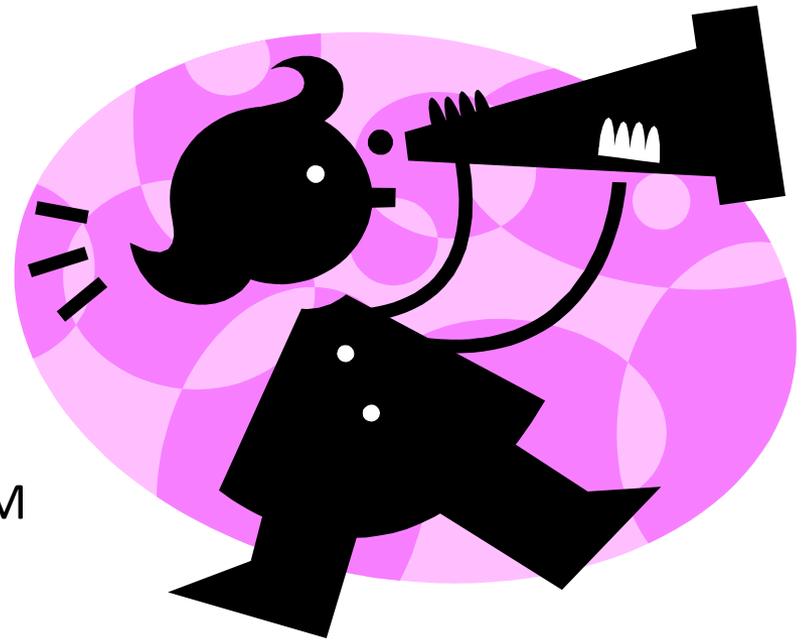
#	Status	Location	Date	Time	Tech	Place	Comment
1	Received	Receiving	05/31/2011	13:00	WD...	GSPR	
2	Collected	Collection Center	05/31/2011	13:00	WD...	GSPR	
3	Ordered	Ordering Location	05/31/2011	13:00	WD...	GSPR	

The search for the missing specimen **MUST** start here at GSPR.

- Once the user finds the tracking for missing specimen's order number, the user determines where the specimen was last known to be located.
- Based on the example screen capture to the right, we see that the specimen that is missing was received at Grosse Pointe Specimen Processing. That is its last known location.

SoftLab Investigation

- If the specimen cannot be located at its last known location then the next step is are to check the audit trail in SoftLab.
- If the specimen cannot be located in SoftLab then a “SWARM” must be called.
- SWARM alert is called whenever a missing specimen cannot be located after the initial search is performed in the lab.
- Information regarding calling a SWARM is at the end of this presentation.



Part 2: Missing Specimen From a Client Office

- Background: Specimens from a client office arrive in the lab unordered.
- Specimens are transported via Courier to the lab.
- Specimens are accompanied by a paper requisition which has a barcode on the paper requisition. The barcode on the paper requisition is scanned into Soft Express.
- Soft Express system “tracks” the pick-up and drop-off of the specimens and their requisitions from the client office to the testing lab.
- **SOFT EXPRESS IS NOT INTERFACED WITH SOFTLAB.**

Client Office Missing

- When it has been determined that a specimen is missing from a client office, the first point of investigation is....SoftLab.
- The investigator first checks SoftLab to see if the specimen has an “Ordered” status in SoftLab specimen tracking.



Client Office Missing

- If the missing specimen CANNOT be located in SoftLab, then the specimen has not been Ordered in SoftLab.
- The investigator next queries Soft Express to continue the search for the missing specimen.
- In our example, there will be no Order number as the specimen is not ordered into SoftLab.
- The search requires a different set of information in order to locate the specimen.

Client Office Missing...Information!

- What information are you provided about the missing?
- Client number? Patient name?
- Requisition number? Date/Time of Collection?
- For the missing specimen from the client office, it is key to the search to obtain as much information from the caller about the missing as possible to properly locate the specimen.

Client Office Missing...Tools

- There are some reports that can be pulled from Soft Express to expedite the search for a missing specimen.
- Specimen History Report to the right is an example of just such a report.

3811 West 13 Mile Rd.
Royal Oak, MI 48073
800-551-0488
248-551-2783 fax

Specimen History

Date from 04/04/2011 to 06/02/2011

Specimen ID: -P996					
Date/Time: 4/7/2011 3:00:33 PM	Status: Pick Up	Qty: 1	Courier: David Schwartz	Acc ID: RWARR	Loc.Barcode Type:
Loc.Barcode Type does not qualify for posting to LAB					
Route ID: THU105					
Date/Time: 4/7/2011 3:05:48 PM	Status: Drop Off	Qty: 1	Courier: David Schwartz	Acc ID: ROLSP	Loc.Barcode Type:
Loc.Barcode Type does not qualify for posting to LAB					
Route ID: THU105					
Specimen ID: 0000123809998					
Date/Time: 4/29/2011 9:04:19 AM	Status: Pick Up	Qty: 1	Courier: David Schwartz	Acc ID: 09998	Loc.Barcode Type: S
Posted Date/Time:					
Route ID: FRRIOS1					
Specimen ID: 000319					
Date/Time: 5/19/2011 1:32:07 PM	Status: Pick Up	Qty: 1	Courier: David Schwartz	Acc ID: TLKOR	Loc.Barcode Type:
Loc.Barcode Type does not qualify for posting to LAB					
Route ID: THUROS1					
Date/Time: 5/19/2011 1:34:10 PM	Status: Pick Up	Qty: 1	Courier: David Schwartz	Acc ID: TLKOR	Loc.Barcode Type:
Loc.Barcode Type does not qualify for posting to LAB					
Route ID: THUROS2					
Date/Time: 5/19/2011 1:41:46 PM	Status: Drop Off	Qty: 1	Courier: David Schwartz	Acc ID: ROLSP	Loc.Barcode Type:
Loc.Barcode Type does not qualify for posting to LAB					
Route ID: THUROS2					

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Client Office Missing....



- From the Specimen History report, the investigators can view all of the work from one or all the couriers, whether the work had been picked up, dropped off, the requisition number, the courier route and the last known location of the specimen.
- For this report it is helpful to have the requisition number from the missing specimen as this specifies and narrows the search.

The screenshot shows a web browser window titled "Browsing Report - Windows Internet Explorer". The page displays the "Specimen History" report for Beaumont Laboratory. The report includes the following information:

3811 West 13 Mile Rd.
Royal Oak, MI 48073
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248-551-2783 fax

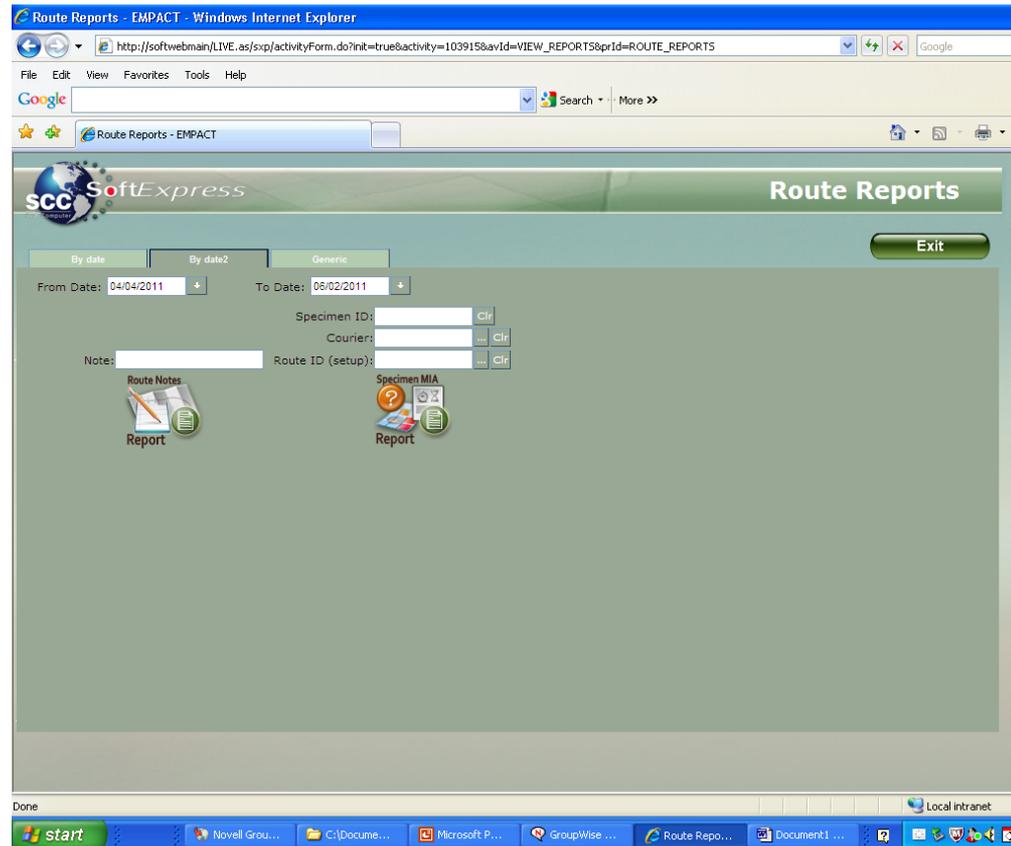
Specimen History
Date from 04/04/2011 to 06/02/2011

Specimen ID	Date/Time	Status	Qty	Courier	Route ID	Acc ID	Loc.Barcode Type
-P996	4/7/2011 3:00:33 PM	Pick Up	1	David Schwartz	THU105	RWARR	Loc.Barcode Type does not qualify for posting to LAB
	4/7/2011 3:05:48 PM	Drop Off	1	David Schwartz	THU105	ROLSP	Loc.Barcode Type does not qualify for posting to LAB
0000123809988	4/29/2011 9:04:19 AM	Pick Up	1	David Schwartz	FRIROS1	09988	S
000319	5/19/2011 1:32:07 PM	Pick Up	1	David Schwartz	THUROS1	TLKOR	Loc.Barcode Type does not qualify for posting to LAB
	5/19/2011 1:34:10 PM	Pick Up	1	David Schwartz	THUROS2	TLKOR	Loc.Barcode Type does not qualify for posting to LAB
	5/19/2011 1:41:46 PM	Drop Off	1	David Schwartz	THUROS2	ROLSP	Loc.Barcode Type does not qualify for posting to LAB

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Client Office Missing..MIA Report

- The MIA Report is another useful Soft Express report to aid in the investigation of a client office missing specimen.
- The MIA report is located on the second tab of the Route Reports in Soft Express
- Users enter any of the following information to search the courier work records:
 - Date range
 - Specimen/Requisition ID
 - Courier or Route ID



Client Office Missing..MIA Report

- Once you have specified the search parameters, you are provided with a report similar to the one on the right.
- On the MIA report, the user can view the client id, route id, courier, specimen numbers and types and statuses, ie picked up and/or dropped off.

Route Start Date Time	Route End Date Time	Route ID	Courier Name
04/07/2011 01:01 PM	04/07/2011 03:08 PM	THU105	David Schwartz
Item Id			
CARY-BLAIR	Item Discrepancy	Discrepancy Details	
	1	Not All Items Dropped Off	
Action	Count	Acc Id	Acc Name
Pickup	2	62	Andrew Check, MD
Drop Off	1	ROLSP	RO Lab Specimen Processing
			Action Date
			4/7/2011 2:08 PM
			4/7/2011 3:05 PM
Item Id			
CUPS	Item Discrepancy	Discrepancy Details	
	2	Not All Items Dropped Off	
Action	Count	Acc Id	Acc Name
Pickup	3	6	Richards & Richardson
Drop Off	1	ROLSP	RO Lab Specimen Processing
			Action Date
			4/7/2011 2:00 PM
			4/7/2011 3:05 PM
Item Id			
ROUTINEC/XSW	Item Discrepancy	Discrepancy Details	
	2	Not All Items Dropped Off	
Action	Count	Acc Id	Acc Name
Pickup	3	62	Andrew Check, MD
Drop Off	1	ROLSP	RO Lab Specimen Processing
			Action Date
			4/7/2011 2:02 PM
			4/7/2011 3:05 PM
Item Id			
TUBEGLDSST	Item Discrepancy	Discrepancy Details	
	29	Not All Items Dropped Off	
Action	Count	Acc Id	Acc Name
Pickup	30	1260	Residential Home Health
Drop Off	1	ROLSP	RO Lab Specimen Processing
			Action Date
			4/7/2011 2:11 PM
			4/7/2011 3:05 PM
Item Id			
TUBELAV4.0	Item Discrepancy	Discrepancy Details	
	49	Not All Items Dropped Off	
Action	Count	Acc Id	Acc Name
Pickup	50	1260	Residential Home Health
Drop Off	1	ROLSP	RO Lab Specimen Processing
			Action Date
			4/7/2011 2:11 PM
			4/7/2011 3:05 PM
Item Id			
TUBELBL2.7	Item Discrepancy	Discrepancy Details	
	14	Not All Items Dropped Off	
Action	Count	Acc Id	Acc Name
			Action Date

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Client Office Missing...

- These reports are very useful in locating the missing specimen.
- If the specimen cannot be immediately located, there are other managerial reports in Soft Express that aid in the search once the client id and courier id have been obtained.



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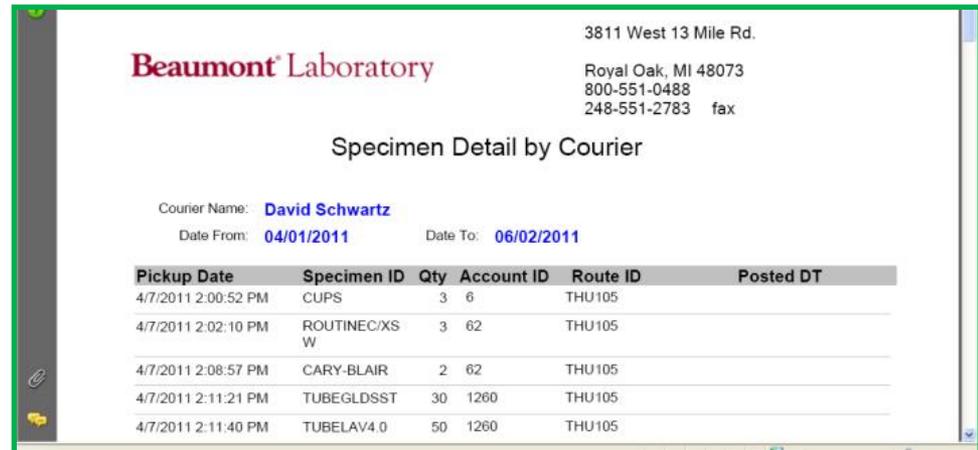
Beaumont Laboratory

Specimen Detail by Account

Account ID: **100** Account Name: **Michigan Women's-Health Institute-Wblm**
From Date: **04/01/2011** To Date: **06/02/2011**

Pickup Date	Specimen ID	Qty	Route ID	Posted Date
5/24/2011 10:56:16 AM	AFFRIM	1	TUES116	

All Specimens for 100: 1



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248-551-2783 fax

Beaumont Laboratory

Specimen Detail by Courier

Courier Name: **David Schwartz**
Date From: **04/01/2011** Date To: **06/02/2011**

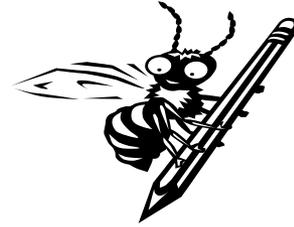
Pickup Date	Specimen ID	Qty	Account ID	Route ID	Posted DT
4/7/2011 2:00:52 PM	CUPS	3	6	THU105	
4/7/2011 2:02:10 PM	ROUTINEC/XS W	3	62	THU105	
4/7/2011 2:08:57 PM	CARY-BLAIR	2	62	THU105	
4/7/2011 2:11:21 PM	TUBEGLDSST	30	1260	THU105	
4/7/2011 2:11:40 PM	TUBELAV4.0	50	1260	THU105	

Hey, I have done all this...now what??

- In the event that neither Soft system can yield the investigator useful information as to the location of the specimen, a **SWARM** is called.
- **SWARM** acronym stands for:
 - S** Search
 - W** Warn
 - A** Alert
 - R** Regroup
 - M** Manage
- A SWARM is paged at pager group **54241**.



Why the SWARM?



- A SWARM should be called when there is an action that has occurred that requires immediate attention by the appropriate personnel.
- “In most cases, the SWARM alert is sent out by the Client Services staff but anyone discovering a situation that warrants notification to a large group concerning an issue with a specimen may call a SWARM alert. “
- See Lab Policy BL.PR.007r00 for more details.

In Conclusion.....

- If notification of a missing specimen arrives at the lab, take down as much information as you can from the caller
- Discern whether the specimen was sent to the lab ordered or unordered.
- Use the appropriate Soft module to investigate the missing specimen
- If no specimen can be found, call a SWARM to further the search.



Credits

- Questions on content and/or input or critique on required modifications should be addressed to:
 - Laboratory LIS Soft Support
LaboratoryLISSoftSupport@beaumont.edu