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Beaumont

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Area	Laboratory-Blood Bank
Applicability	All Beaumont Hospitals

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) specifically where nursing staff and clinicians view laboratory results, among other items in the patient electronic health record (EHR).

B. Epic Beaker (Beaker): Laboratory Information module (LIS) within the HIS where laboratory staff orders, enters, and results laboratory tests. Only laboratory staff have access to Beaker.

C. Blood Bank Information System (BBIS): software utilized by the blood bank staff to receive, process, store and retrieve information concerned with blood product inventory. It also has a direct connection with the LIS to receive patient orders, and exchange information with the send patient test results and and the administrative and inventory management within a blood bank .

D. 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:
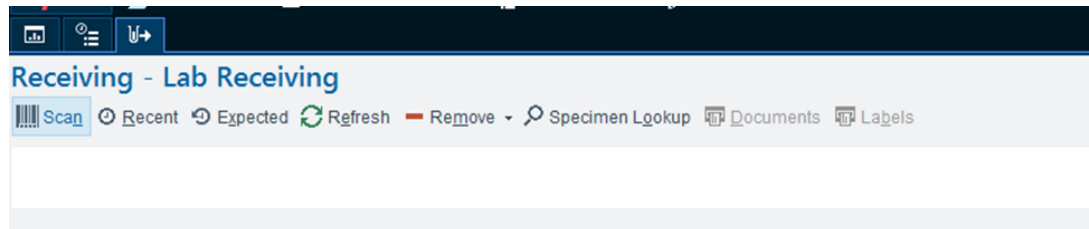
A. Reviewing the Outstanding List

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/EMERGENCY 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 the Safetrace Tx BBIS.

   b. If the order is received in Safetrace Tx and appears on Safetrace Tx, complete the actions as detailed in Transfusion Medicine Policy, Reviewing the SafeTrace Pending Work Log.

   c. If the order does not appear on the SafeTrace Tx pending work log:

      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 Safetrace Bank using Patient Order/Specimen.

      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: Notify Lead Medical Technologist or Manager/Supervisor for additional follow up. If necessary a Service Now ticket will be created to resolve the issue.

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. This is used typically by department leaders to anticipate incoming workflow and circumvent lost specimens.

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

2.

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

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.

6. Review the expected list and initiate a SWARM alert for any specimen greater than 48 hrs not yet received. Refer to laboratory policy, Swarm Alerts: Missing or Lost Specimens.

Approval Signatures

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Applicability

Dearborn, Farmington Hills, Grosse Pointe, Royal Oak, Taylor, Trenton, Troy, Wayne