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Area: *Laboratory-Blood Bank*
Key Words:
Applicability: *All Beaumont Hospitals*

CHE Blood Bank Safetrace Reports

Document Type: Procedure

I. PRINCIPLE:

To establish structure and alignment of how to access reports necessary for blood bank operations.

II. RESPONSIBILITY:

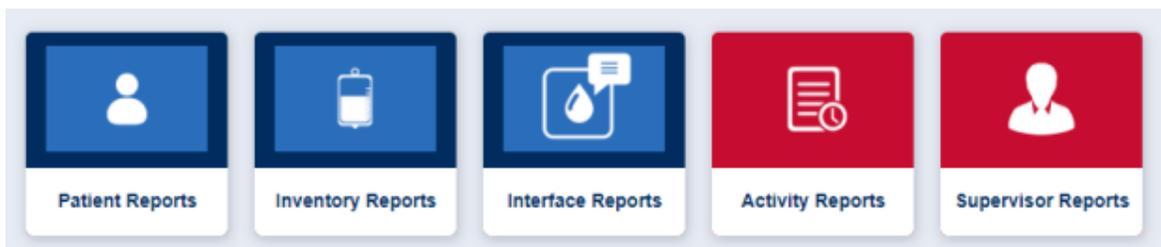
- A. Personnel who have completed the competency requirements and proper security access will perform these tasks.

III. DEFINITIONS:

- A. TMQA – Transfusion Medicine Quality Assurance
- B. BBIS – Blood Bank Information System

IV. PROCEDURE:

- A. Access to reports must be requested in ServiceNow. Reports are found in SafeTrace Qlik and in the form of a custom Tableau report.
- B. SafeTrace Qlik Reports
 - 1. To get into SafeTrace Qlik reports, go to Reports - Reports Hub



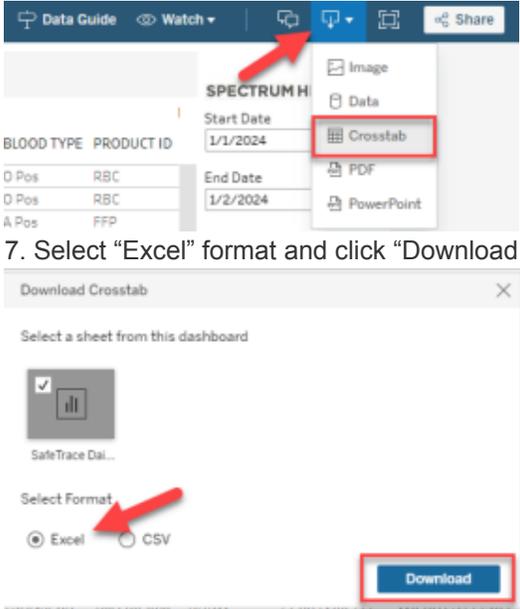
- 2. Bookmarks only need to be created once and can be accessed in the future.
- 3. User level report access by Report Category:
 - a. Patient Reports – Basic, Super User and Supervisor
 - b. Inventory Reports – Basic, Super User and Supervisor

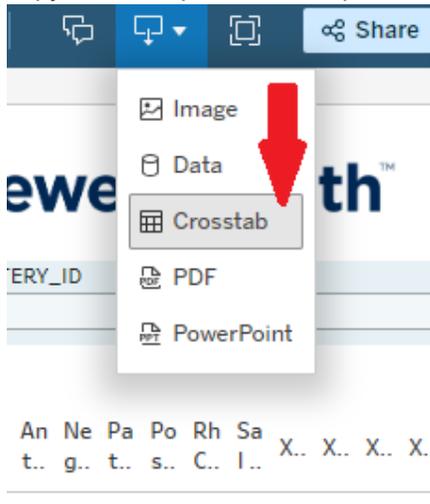
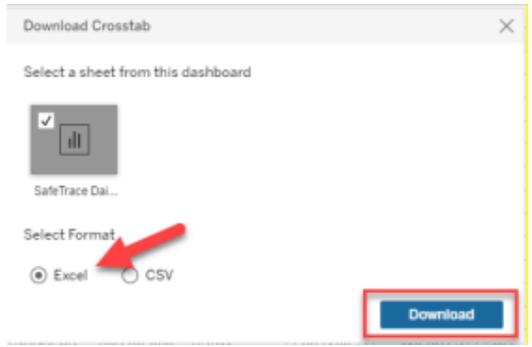
- c. Interface Reports – Basic, Super User and Supervisor
- d. Activity Reports – Super User and Supervisor
- e. Supervisor Reports – Supervisor only

C. Tableau Custom Reports

1. These reports pull information from the BBIS into a custom format established in Tableau.
2. Only one user access level available. Once access has been granted, go to <https://tableaugw.spectrum-health.org/> to find the Tableau Custom Reports.
3. Below are the instructions on how to navigate to the different reports.
 - a. “Report Category” correlates to specific tiles within the Reports Hub of the BBIS.
 - b. Tableau Custom Reports are accessed outside the BBIS. Refer to the Report Pathway for specific instructions.

D.

Report Type	Report Category	Frequency and Responsibility	Report Pathway
Daily Transfusion	Tableau Custom Report	Daily by Lead	<p>Tableau Folder, go to “Blood Bank Operations – Reporting”</p> <ol style="list-style-type: none"> 1. Select “Daily Transfusion Report” 2. Select “SafeTrace Daily Transfusion Report” 3. Enter “Start Date” and “End Date” for the date range. 4. Select “Issue Location” for site specific location and sublocations. 5. Click “Apply” 6. Download spreadsheet and select “Crosstab” CHBL – use Data option and copy to excel spreadsheet report  <p>7. Select “Excel” format and click “Download”</p>
Daily	Tableau	Daily	Tableau Folder, go to “Blood Bank

Worksheet Report	Custom Report	<p><i>Note: This report can also be pulled from the Activity Report, as seen below.</i></p>	<p>Operations – Reporting”</p> <ol style="list-style-type: none"> 1. Select "Lab Worksheet Report" 2. Select "Lab Worksheet Report Horizontal" 3. Enter “Start Date” and “End Date” for the date range. 4. Select “Issue Location” for site specific location and sublocations. 5. Viewing specific tests can be filtered using the "TEST_ID" or "TEST_BATTERY_ID" dropdown menu. 6. Download spreadsheet and select “Crosstab” CHBL – use Data option and copy to excel spreadsheet report
			
			<p>7. Select “Excel” format and click “Download”.</p> 
Daily Worksheet Report	Activity Report	<p>Daily</p> <p><i>Note: This report can also be pulled from the Tableau Custom Report, as seen above.</i></p>	<p>Activity Reports - All Tests:</p> <ol style="list-style-type: none"> 1. Select Testing Worksite [BB site] 2. Choose date 3. Click “Export Sheet” 4. Save to M: drive in site specific location as: “[date][BB site]” Example – 10.30.22
Auto Return to Available	Activity Report	Optional, as needed	<p>Activity Reports - Activity:</p> <ol style="list-style-type: none"> 1. Click on “By Activity Type” 2. Choose transaction type: Automatic

			Available 3. Select Location [BB site] 4. Click "Export Sheet" and print list
Products Expiring in 3 Days	Inventory Report	As Needed	Inventory Reports - Current Inventory: 1. Select Location [BB site] 2. Click "Details" 3. Click "3 Days" Inventory Reports - Inventory Detail 1. Select location 2. Export 3. Sort the excel spreadsheet by expiration date, assigned/available status, etc.
Expired Products	Inventory Report	Optional, as needed	Inventory Reports - Expiration Report: 1. Select Location [BB Site] 2. Click "Expiration Date/Time" magnifying glass 3. Type expiration date MM/DD/YYYY Example – "11/02/2022" 4. Click "Export Sheet" and print list
Factor Overrides	Supervisor Report	As Needed	Supervisor Reports - Reviewed Factors: 1. Click "Date" and select date range 2. Click "Export Sheet" and print list (Override review must occur first in Patient Order -Review Factor Overrides)
Exception Report	Supervisor Report	As Needed	Supervisor Reports - Exception Dashboard: 1. Select Worksite Location [BB site] 2. Create Bookmark 3. Open Bookmark and choose date
Error Correction	Supervisor Report	As Needed	Supervisor Reports - Exception Dashboard: 1. Select worksite location [BB site] 2. Select "Corrected Tests" 3. Create Bookmark 4. Open Bookmark and choose date 5. Click "Export Sheet"
Patient Transfusion History	Patient Report	As Needed	Patient Reports - Patient: 1. Select Patient 2. Enter patient information to search 3. Click Details tab 4. Go to "Transfusion History" box 5. Click "Export Sheet" and print list NOTE: if patient is a "Deceased" status,

			information will not be available.
Available Product Inventory	Inventory Report	As Needed	Inventory Reports - Inventory Dashboard: 1. Select Location [BB site] 2. Create Bookmark 3. Open Bookmark and select Product
Wasted Inventory	Inventory Report	As Needed by TMQA	Inventory Reports ? Wasted Inventory: 1. Select the month from dashboard 2. Click "Details" 3. Click "Order Product Inventory Status" and select "Wasted" 4. Click "Export Sheet"

Attachments

No Attachments

Approval Signatures

Step Description	Approver	Date
	Kristina Davis: Staff Physician	10/29/2024
	Hassan Kanaan: OUWB Clinical Faculty	10/29/2024
	Muhammad Arshad: Chief, Pathology	10/29/2024
	Jeremy Powers: Chief, Pathology	10/29/2024
	Ann Marie Blenc: System Med Dir, Hematopath	10/28/2024
	Masood Siddiqui: Staff Pathologist	10/28/2024
	Ryan Johnson: OUWB Clinical Faculty	10/28/2024
	John Pui: Chief, Pathology	10/28/2024
Policy and Forms Steering Committe (if needed)	Kelly Sartor: Mgr, Division Laboratory	10/28/2024
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	Katherine Persinger: Mgr, Laboratory	10/25/2024
	Hilary Morey: Medical Technologist Lead	10/25/2024
	Kristen DiCicco: Mgr, Laboratory	10/24/2024
	Suzanne Chahine: Medical Technologist Lead	10/24/2024
	Fatima Bazzi: Supv, Laboratory	10/24/2024
	Teresa Lovins: Supv, Laboratory [KS]	10/24/2024
	Karrie Torgerson: Medical Technologist Lead [KS]	10/24/2024
	Kelly Sartor: Mgr, Division Laboratory	10/24/2024

Step Description	Approver	Date
	Kelly Sartor: Mgr, Division Laboratory	10/24/2024
Applicability		
Dearborn, Farmington Hills, Grosse Pointe, Royal Oak, Taylor, Trenton, Troy, Wayne		