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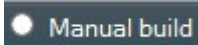
## This Quick Reference Guide (QRG) reviews the workflow to Transfer Specimens

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### Common Buttons & Icons



Transfer Specimen icon



Manual Build radio button

### Set Up Transfer Specimen List Parameters

➤ From the Appbar:

**STEP 1:** Click the **Transfer Specimen** icon.

**STEP 2:** Click **View**.

**STEP 3:** Click **Options**.

**NOTE:** You always want to print two copies of the transfer list, one that will be sent with the specimens and one for your records.

**STEP 4:** Use the **Up Arrow** in the Auto Print Transferred Lists field to increase the number of copies to two.

**STEP 5:** Clear the **Show delete and transfer messages** check box.

**STEP 6:** Select the **Filter by transfer temperature** check box.

**STEP 7:** Select the **Print list in build sequence** check box.

**STEP 8:** Select the **Carry forward locations** check box.

**STEP 9:** Click the **Packing List Only** radio button.

**STEP 10:** Click the **Printer** drop-down arrow.

**STEP 11:** Select the appropriate Printer.

**STEP 12:** Click **Save**.

### Build the Transfer List

➤ From the Transfer Specimen app:

**STEP 1:** Click the **Location From** drop-down arrow.

**STEP 2:** Select the appropriate location.

**STEP 3:** Click the **Location To** drop-down arrow.

**STEP 4:** Select the appropriate location.

**STEP 5:** Click **New**.

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**STEP 6:** Click the **Manual Build** radio button.

**NOTE:** Best practice is to always manually build transfer lists, as this reduces the possibility for errors. With list build, multiple specimens may be under the same accession number, so you run the risk of selecting the wrong container.

**STEP 7:** Click the **Transfer Temp** drop-down arrow.

**STEP 8:** Select the appropriate option.

**STEP 9:** Scan your specimens into the list.

**NOTE:** If you have two specimens for one test, it is important to scan each one individually. Specimens have the same accession number and the same test, but they have different letters for different containers.

**STEP 10:** Click **Save**. A pop-up displays, informing you that the list was created.

**STEP 11:** Click **OK**.

**STEP 12:** Click **Transfer**.

**NOTE:** To view a list that has already been transferred, change the mode to transferred using the radio button at the top of the screen. Then, click **Retrieve**.

### **Add an Additional Specimen to a Transfer List**

➤ From the Transfer Specimen app:

**STEP 1:** Click the Transfer List.

**NOTE:** You can only add an additional specimen before the list is transferred in the system.

**STEP 2:** Click **Modify**.

**STEP 3:** Click the **Manual Build** radio button.

**STEP 4:** Scan the specimen.

**STEP 5:** Click **Update**. A pop-up displays, informing you that the list was created.

**STEP 6:** Click **OK**.