

Checklist – CareAware Connect Phlebotomy Management

Document and forward any additional questions that you are unable to answer to the appropriate member of the team. Do not leave concerns open-ended; YOU are responsible for following up.

Please note the following are priorities during your time with the staff:

- Setting filters
- Do NOT use Chart Not Collected
- Printing labels
- Scanning of patient, printer, and label

Date: _____

CI/Support Name: _____

Staff Member Name: _____

Staff Position: _____

Task	Yes	No	N/A
1. Signing into Connect Phlebotomy Management			
Creating/Editing/Removing PIN: Set up 4-digit PIN for quick and easy sign-on			
2. Table of Contents (TOC)			
Location of TOC			
Review items within the TOC			
Review how to change status			
3. Worklist Filter Set-up			
Review filter set-up			
• Organization			
• Specimen Type			
• Collected by			
• Locations			
4. Activity Task List			
Review task list/sorting task list			
Review how to see more patient details			
Review selecting a patient from the activity list to view orders			
View order details			
5. Printing Labels			
Review how to print labels.			
• Scanning method			
• Manual Method			
6. Specimen Collect			
Review collection process with scanning – patient wrist band and printer			

Checklist

Override process if wristband or label scanning not working			
Review adding a comment, modifying collection method, modify date/time			
STRESS DO NOT USE CHART NOT COLLECTED ; this will delete the order			
Review how to Reset if scanned as collected and specimen was not collected			
Review signing when complete			
7. Logging Out			
Review logging out of all applications used at the end of shift			
8. Weird Gotchas			
9. Review where to find more materials			
10. Comments/Concerns			