

# From the Office of Health Informatics CareAware Connect Phlebotomy Management May 27, 2025

The CareAware Connect Phlebotomy Management application is designed to support the phlebotomist in positive patient and positive accession identification at the bedside during the specimen collection process.

# First Time Log In

- **<u>STEP 1</u>**: Tap the **CareAware Connect Phlebotomy Management** icon on the home screen.
- **<u>STEP 2</u>**: Enter Cerner username and password in the login screen, then tap **Log In**.



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PIN Setup You may set up a simple numeric PIN to unlock your session instead of using your username and

This PIN is shared across Cerner Millennium+ mobile applications and is specific to Eng. Staging (Project Go), just like your password.

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<u>NOTE</u>: Do not tap Remember Username box, as this is a shared device and will be used by many members of the care team.

- **<u>STEP 3</u>**: The user will be prompted to set up a **PIN** upon logging in the first time. Tap **Create** to create the four-digit numerical PIN.
  - To change or remove the PIN after creation, tap the menu icon on the top left of the screen, tap Settings, and then tap Change PIN or Remove PIN.

# Filter Set-up

- **<u>STEP 1</u>**: Once logged in, the **Filters** screen will display. Tap the organization from the dropdown menu.
  - When logging in the first time, only the **Organizations** filter will display.
- **<u>STEP 2</u>**: Once the organization has been tapped, tap the **Specimen Type** as **Blood** and the **Collected By** as **Lab Collect**.
  - The **Specimen Type** and **Collected By** filters may be changed as needed by using the dropdown menus.
- **<u>STEP 3</u>**: The **Locations** filter dropdown populates with locations for the selected organization. Tap locations to pull patients into the Multipatient worklist view, then tap **Apply** at the top right.
- **<u>STEP 4</u>**: The patient worklist will populate with patients based on the organization and locations selected.
  - Modify the filters applied by navigating to the Filters screen by tapping the Filter icon at the top of screen.

- **<u>STEP 5</u>**: Sort the worklist by tapping the **Sort** icon. Tap **Save** at the bottom of the screen to save the sort settings.
  - Lists can be sorted by **Patient** or **Location**.
  - Lists can be sorted by **Ascending** or **Descending** order.
- **<u>STEP 6</u>**: To refresh the list, tap the **Refresh** <sup>*C*</sup> icon on the top left of the worklist.

#### **Reviewing Patient Details**

Prior to seeing a patient, phlebotomist may view the patient details and view order details.

- **<u>STEP 1</u>**: To view **Patient Details**, tap the arrow to the right of the patient's name to view:
  - Patient Banner Bar
  - Priority
  - Location
  - Isolation
- **<u>STEP 2</u>**: To return to the worklist, tap the back arrow.
- **<u>STEP 3</u>**: To view orders by patient, tap the patient's name.
  - Tap the relationship of **Patient Care**.
  - Tap **Continue**.

#### Viewing Order Details

Prior to specimen collection, phlebotomists may view the order details.

- **<u>STEP 1</u>**: To view order details, tap the arrow to the right of the specimen order.
- **<u>STEP 2</u>**: A text bubble under the order indicates an order comment.
- **STEP 3**: To return to the **Collections** screen, tap the **Activity Details arrow back**.
- **<u>STEP 4</u>**: **Select All** is checked by default. If all specimens will not be collected, uncheck the **Select All** box and check the box next to the specimens for collection.
  - A pink banner above the orders with a caution triangle will display indicating the orders include a **STAT** order(s).
  - **STAT orders** will display at the top of the list in red text and will have a red diamond to the left of the order.



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**<u>STEP 3</u>**: Tap the **Print** icon in the lower right side of the screen. Place the labels on the corresponding specimen container at the bedside.

# **Collecting and Documenting Labs**

**<u>STEP 1</u>**: Tap the appropriate patient's name from the worklist. A list of individual collection activities will display.

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- **<u>STEP 2</u>**: Scan the patient's wristband. After completing the lab draw or specimen collection, scan the corresponding accession lab labels. The specimen will be marked as **Collected**.
- **<u>STEP 3:</u>** Tap **Sign** to sign the documentation. Sign Successful will display.
  - Tap **Dismiss** to clear the pop-up.



# **Accession and Patient Scan Override**

- **<u>STEP 1</u>**: From the **Collections** screen, tap **Collect** in the lower right corner.
- **<u>STEP 2</u>**: On the **Accession Override** screen, tap a **Reason** for the accession scan override from the dropdown menu and tap **Apply**.
- **<u>STEP 3</u>**: Tap **Sign** on the **Collections** screen to sign off on the collection(s).
- **<u>STEP 4</u>**: Tap the **Override** screen, tap a **Reason for patient scan override** from the dropdown menu, then tap **Sign**.

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#### Add Comment

- **<u>STEP 1</u>**: After scanning the specimen, tap the arrow to the right of the specimen to navigate to the **Details** screen.
- **<u>STEP 2</u>**: Tap the ellipsis on the top right of the screen.
- **<u>STEP 3</u>**: To add a comment, tap **Add Comment**, and enter the comment in the Comment field.
- **<u>STEP 4</u>**: Tap **Apply**.

#### **Modify Collection Method**

- **<u>STEP 1</u>**: After scanning the specimen, tap the arrow to the right of the specimen to navigate to the **Details** screen.
- **<u>STEP 2</u>**: Tap the ellipsis on the top right of the screen.
- **<u>STEP 3</u>**: Tap **Modify Collection Method** and indicate the appropriate collection method from the dropdown.
- **<u>STEP 4</u>**: Tap **Apply**.

#### Modify Date/Time

- **<u>STEP 1</u>**: After scanning the specimen, tap the arrow to the right of the specimen to navigate to the **Details** screen.
- **<u>STEP 2</u>**: Tap the ellipsis on the top right of the screen.
- **<u>STEP 3</u>**: Tap **Modify Date/Time** and indicate the appropriate collection date and time.





Cancel	Date/Time	Apply
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<u>STEP 4</u>: Tap Apply.

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# **Specimen Reset**

If a specimen is scanned as collected and was not in fact collected, the task can be reset.

- **<u>STEP 1</u>**: After scanning the specimen, tap the arrow to the right of the specimen to navigate to the **Details** screen.
- **<u>STEP 2</u>**: Tap the ellipsis on the top right of the screen.
- **STEP 3**: Tap **Reset** and the currently tapped collections will be cancelled. The user will be returned to **Collections** screen.

# **Not Collected Specimens**

For specimens that were unable to be collected, **DO NOT USE CHART NOT COLLECTED.** 

- This will Delete the Order.
- ▶ No one else will be able to attempt the collection unless another order is placed.

# Logging Out

After the completion of a shift, users will log out of ALL applications used in the Connect device.

- **<u>STEP 1</u>**: Tap the menu icon in the top left of the screen.
- **<u>STEP 2</u>**: Tap **Log Out**.

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Add Comment	
Modify Collection Method	
Modify Date/Time	
Reset	
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Chart Not Collected	
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Reschedule	
Chart Not Collected	
Print Label	
Settings	
Log Out	

For questions regarding process and/or policies, please contact your unit's Clinical Educator. For questions regarding workflow, please <u>place a ticket</u> to Health Informatics. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.