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Owner:	Alex Alba: Spvr, Laboratory
Policy Area:	Lab - Client Services
References:	
Applicability:	Sutter Roseville Medical Center

Sunquest Clinical Collect Operating Procedure, CL.NON02.06-/-RV.xx

Purpose

A. To provide guidance to phlebotomy staff in the proper use and operation of Sunquest Clinical Collect software program, hand-held device and paired blue tooth printer for identification of patients and printing of specimen labels at bedside.

Policy

- A. A. Verification of patient identity by comparing two identifiers (ex. patient name and date of birth) on the identification band with same identifiers on applicable health information documents will occur prior to initiating the procedure.
1. Phlebotomist must complete patient identification by verifying 2 patient identifiers on identification band with same identifiers on applicable health information documents will occur prior to initiating the procedure.
 - a. Phlebotomists must complete patient identification process at the bedside using the Sunquest clinical collect(CC) hand-held device by scanning the patient armband. (CC will provide legal name only- not preferred name).
 2. Phlebotomists must checkout CC hand-held and paired blue tooth printer at the beginning of each shift following established protocols.
 3. Standard precautions will be maintained at all times with appropriate use of personal protective equipment (PPE).
 4. CC devices must be cleaned as needed in between patients with appropriate hospital approved sanitizing wipes.
 - a. for isolation rooms, device must be place in a protective bag. An applicator stick will be used as a stylus.
 - b. Once out of the isolation room, phlebotomist must open bag and gently shake device out of the bag without allowing bag to touch the the phlebotomy cart.

Scope

- A. All Lab Assistants

Definitions

- A. **PPE**- personal protective equipment
- B. **Clinical Collect(CC)**- Sunquest Laboratory product that is an application loaded on to a hand held device that allows for the scanning of patient armbands to ensure positive identification at the bedside.
- C. **CT 40 Honeywell** - Specific model of hand-held scanning device
- D. **QWERTY Keyboard** - Button-driven keyboard on device

Procedure

A. List of specific materials needed for procedure:

- 1. CT 40 Honeywell hand held device
- 2. paired blue tooth printer RP2
- 3. Phlebotomy cart stocked with blood collection supplies

B. Equipment Check Out

- 1. Gather all the required equipment, using established protocols.
- 2. Phlebotomist must check out hand held device and corresponding blue tooth printer
- 3. Follow proper protocols for cleaning equipment prior to use.

C. Logging In

- 1. Tap the Sunquest Clinical Collect Standard logo
- 2. Enter user's Sunquest logon credentials (Double click up arrow to turn on Caps lock)
 - a. User name is the user's Sunquest access code
 - b. Enter password associated with user's Sunquest access code
- 3. Tap the green login button on the screen

D. Navigating the Work list Screen

- 1. After login, the Worklist screen will display
- 2. The worklist consists of two parts: The Patient List and Draw preparation screen
- 3. The Patient List shows patients with pending orders that are awaiting collection
 - a. The All Patients tab shows all patients with pending orders based on established filter settings
 - b. The My Patients tab shows patients that user has claimed using the Claim button (**Do Not use this Claim function**)
 - c. The order priority codes appear in color (Red for Stat, Blue for ASAP, Green for Timed, No color for Routine)
 - d. The patient and order information shows the patient name, location, and order collection time. If patient has multiple orders , the earliest collection time is displayed followed by the number of orders in parenthesis
 - e. The patient list filter displays filter settings
 - f. The patient list icons are : lock icon indicates another user is in process of collecting blood from

the patient, comment box icon indicates that a test comment is entered, an asterisk indicates patient has multiple accessions to be collected

4. The Draw Preparation Screen shows the patient information, blood tube container information, and order information
 - a. **figure work list locations to view group locations or individual units** Patient information displays patient name, gender, patient ID, DOB, and age
 - b. Blood tube container information displays the containers in order of draw
 - c. Order information displays collect date/time, priority, ACC number, patient account number, comments if entered and if order was rescheduled

E. Filter worklist location to view group locations

1. All Clinical Collect devices are configured with default settings for filtering and sorting the worklist. Only change the filter location as directed by the Client Services Supervisor
2. Any changes made to the location filter are saved on the device
3. To change the filter location, tap the filter icon on the bottom right of the patient list
4. Tap the Location option
 - a. To see all inpatients with orders, place checkmark by tapping on the box next to location RVCIP
 - b. To see patients with orders in ED, place checkmark by tapping on the box next to location RVCER
 - c. To see patients in specific location(s), place checkmark by tapping the box next to desired location
5. Once desired location is selected, tap the blue "Apply" button to return to the patient worklist screen

F. Draw a Patient

1. Basic use:
 - a. Knock before entering or announce yourself upon entering patient room.
 - b. Use *AIDET* scripting with patient.
 - c. Tap the scan patient prompt at the bottom of the patient worklist screen and make sure cursor is flashing
 - d. Locate patient's armband.
 - e. Point the hand held device scanner (top of device) towards the patient's armband
 - f. Activate scanner by pressing the blue button on the left hand side of the hand-held device.
 - g. When barcode is appropriately scanned, patient's information displays in the Confirm Patient screen. If a pop up window appears that states patient wasn't found, click the "No" button and scan again. Be sure that you are scanning on the armband,
 - h. Confirm patient identity by asking patient to state name and date of birth. Paying attention to "Legal name" vs. "Preferred name". Only patient legal name will appear on the Clinical Collect Device.
 - i. If the identity or accuracy of the armband "legal name" is in question, do not tap the "Confirm" button. Seek out the patient's nurse for confirmation.

- j. Once patient identification is confirmed, tap the Confirm button
- k. At the Collect Screen, view and evaluate the ordered tests
- l. Scroll up to the top of the display and review from the top down all pending orders to be collected for the patient.
- m. Select the test(s) to collect by tapping the check box next to each test order
- n. Prepare the tubes and perform the venipuncture to collect the specimen
- o. Once the venipuncture is successful, tap the Print button
 - i. if temporary labels are required then at the Collect Screen, tap the elipses icon at the top right hand corner of the screen. Select temporary on left side of screen. Select the check box next to the test order then tap Print to print the temporary label(s)
 - ii. If labels for extra tubes are required then at the Collect Screen, tap the elipses icon at the top right hand corner of the screen. Select Add Test on left side of screen. Select the check box next to the container desired then tap Print to print extra tube label(s)
- p. If all labels printed correctly and your collection is complete then tap the Yes button to send the collection data to the Sunquest information system
- q. If any label requires to be reprinted, select the check box next to the container(s) desired then tap Reprint then tap the Yes button
- r. Once the label(s) have successfully printed, the session is complete. A confirmation message appears and screen returns to the Patient Worklist screen
- s. Label samples at the bedside or within sight of the patient
- t. Place blood samples and labels in the specimen bag and tube to the lab

G. Adding Comments to a Test Order

1. To add a comment to a test order, in the patient Collect Screen
 - a. Select the down arrow next to the desired test
 - b. Tap Comments
 - c. Enter the free text comment in the gray box
 - d. If needed, select the check box "Apply comment to all tests on accession"
 - e. Tap Save Comments button
 - f. After saving, the freetext comments appear under the test
 - g. In the Patient Worklist screen, a comment icon will display next to the patient information to indicate that comment is available
 - h. In the Draw prep screen, the comment can be viewed

H. Result at Request for Blood Culture Collection

1. The result at request feature is used to document the blood culture source
2. The RAR test is displayed by an exclamation point icon
3. The RAR test require that you answer the question before you can print labels
 - a. If the icon is red, the RAR test requires a response

- b. If the icon is black, the RASR test has a documented response
4. To answer the question (document the blood culture source), in the patient Collect Screen tap the exclamation point icon next to the blood culture order
5. In the Result at Request screen, check the appropriate source and enter additional free text comment per protocol
6. Tap the Apply button when complete
7. In the patient Collect Screen, the exclamation point icon next to the blood culture order is black and labels can be printed

I. Manual Entry

1. If patient armband is not legible contact patient's nurse and have a new armband placed before proceeding.
 - a. Manual entry is used If scanner is not working or when entering comments on a test order
 - b. Locate the patient's CSN "account number" on the work list or on demographic labels.
 - c. In the Patient worklist screen, tap the keyboard icon
 - d. At the Manual Entry screen, enter the account number
 - e. Select the appropriate check box for the reason of manual entry
 - f. Tap the Submit button
 - g. Confirm patient identity and proceed with collection process.

J. Logging Out

1. From the Patient Work list screen, tap the arrow on the top left hand corner of the screen
2. The user will be returned to the log in screen.
3. Scroll up to return to Sunquest clinical collect icon screen

K. Power and Battery

1. Power:
 - a. To power ON device, press the top button on the right side of the clinical collect device
 - b. To power OFF device, press the top button on the right side of the clinical collect device. When power off option displays, tap Power off
 - c. To release device from Stand by mode, press the top button on the right side of the clinical collect device. Scroll up to display the Sunquest Clinical Collect icon. Tap the icon to display the logon screen
2. Battery indicator:
 - a. Battery indicator is located on top of the screen in black information bar and indicates external battery life.
 - b. Battery levels are indicated in the form of a battery graphic with indicated fill level.
 - c. If the icon displays a nearly empty battery, power off device immediately and place in charging cradle.
3. External battery:

- a. External battery is located at the back of the device.
 - b. To replace battery:
 - i. Slide the plastic battery tab to the right.
 - ii. Remove main battery.
 - iii. Immediately replace the battery. *DO NOT leave battery out, immediate replacement must be made.
4. Charging:
- a. Place device in charging cradle immediately after use or when battery levels are indicated as low.
 - b. Ensure that hand-held strap is clear of the button of the device so that the device seats correctly in the charging cradle.
 - c. Center light at the top of the device will blink indicating it is correctly placed in the cradle and charging.
 - d. Battery is a full charge when the device light is solid and no longer flashing.

L. Wireless Connection

1. Wireless connectivity is indicated by the icon at the top of the screen in the black information bar and in wireless bars.
2. Bi-directional arrows on the wireless bars indicates that the device is connected.
3. An "X" through the wireless bars indicates the device is not connected.
 - a. To resolve wireless connectivity issues try standing still (not walking) for a few seconds to give the device a chance to connect to a wireless access point
 - b. If the device fails to connect, perform a warm-boot on the device, press and hold the power button. When Restart option displays then select Restart
 - c. Power up and proceed with tasks.
4. A pop up error stating that the device cannot connect to Sunquest is another indication that the device is not connected to wireless.
 - a. Follow steps 3a through 3c to resolve. (see above).
5. If a single device continues to have wireless connectivity issues and cannot be resolved report to processor or supervisor.
6. If all devices are unable to connect to wireless, this is an indication of a larger problem with the wireless network or server and must be reported to the Sutter IS Help Desk immediately.
DOWNTIME procedures must be initiated until resolved.

M. Bluetooth printer

1. To power on printer press green power button on the top of the printer.
 - a. Printer will time out after 20 minutes of inactivity and must be powered back on at next use.
2. Changing labels:
 - a. A red stripe on label indicates the label roll is running low and needs to be changed. Stripes on the labels interfere with analyzers.

- b. To change labels, press down on the silver lever located on the left side of printer
 - i. Lift the top lid to open.
 - ii. Using two fingers pull the black tabs to the side and remove the label roll.
 - iii. Pull the black tabs to the side once again to insert new label roll.
 - iv. Advance the labels by pulling out the labels past the cutting edge of the printer.
 - v. Close the top lid of the printer.
 - vi. Press the label feed button on the top left hand side of the printer to align the new roll of labels.
- 3. Charging printer:
 - a. When the printer battery is low, place the printer into the printer charging cradle.
 - b. Battery may also be charged by removing the battery from the bottom of the printer.
 - c. Remove low battery, replace with charged battery.
- 4. Bluetooth connection:
 - a. Should labels fail to print when label print is initiated, ensure the printer is on.
 - b. If printer is on, but continues to error that the printer is off, power off and on again.
 - c. If problem continues there may be an issue with the blue tooth pairing and user must report the issue by completing the process used for problematic devices.

Related Documents

- A. Related Policies and Procedures
 - 1. Collecting Peripheral Blood Culture Specimens
 - 2. Collection of Blood Specimens by Venipuncture

Reference

- A. Sunquest Clinical Collect User Manual

Attachments

- A. None

All revision dates:

Attachments

No Attachments

Approval Signatures

Step Description	Approver	Date
Laboratory Director	Lindsey Westerbeck: Dir, Lab	pending

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