sysmex

Caresphere™ Workflow Solution (WS)

Caresphere WS

Quick Guide

Log In & Select Site

Log in

1. Launch your web browser.
2. Open the URL for your laboratory's Caresphere WS tenant.
3. Enter your e-mail address and password, then click [LOG IN >].
     NOTES:
     - Your Caresphere WS log in typically matches your network ID and password.
          - If you are experiencing issues, please contact your IT helpdesk.
     - This information may be automatically filled in with the user information for the person logged into your workstation.
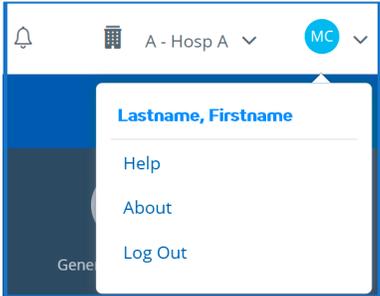4. The Homepage appears.
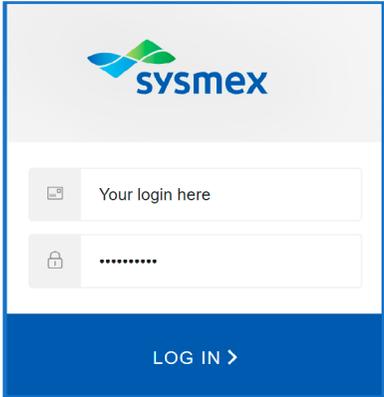
Change Site

1. Click the site selector drop-down menu.
2. Click the site name you wish to access.
3. If the site is not listed, click [See All Sites] and then select the site you wish to use access.
4. Click [OK].
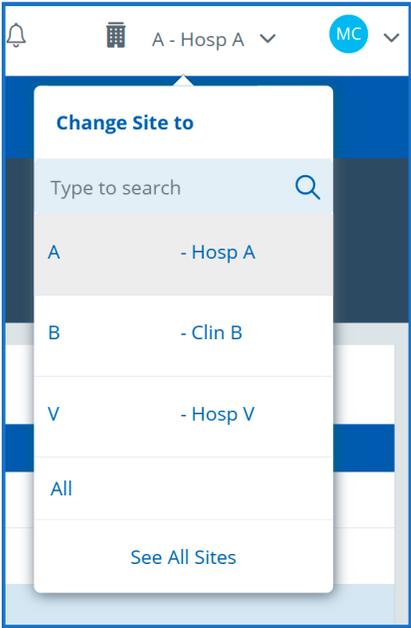
Log Out

1. Click the user profile in the upper right-hand corner of the application.
2. Click Log Out.
3. Close the web browser.
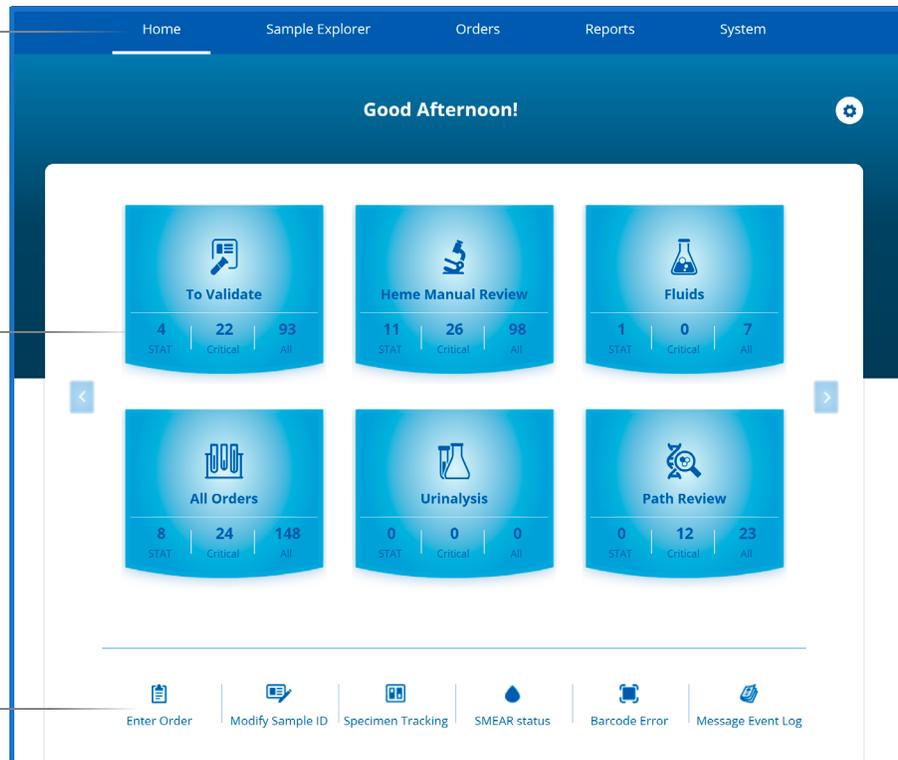
Homepage

Top Menu

- Five main areas in the software.
- User access level defined.
- Displays on all function screens.

Main Menu

- Workflow panels automatically filter pending work.
- Selection of a panel accesses Result Validation.
- These can be customized as needed.

Footer Menu

- Common functions not related to Result Validation.

Result Validation Panels

Each panel contains three numbers.
- **STAT:** Number of samples in this workflow that are ordered STAT.
- **Critical:** Number of samples in this workflow that have critical results.
- **All:** Total number of samples filtered into this workflow.

Sample Explorer and Result Validation

The panels will be configured to filter samples to match you laboratory's workflows. Click on the panel corresponding to the validation duties you are performing. These samples will be listed in order of receipt with STATs first, then critical results which will be followed by the remainder of the samples.

Result Validation Screen

Log in

Comments

Comments (Report & Internal) can be added to the sample.

Scattergrams & Histograms

Scattergram and Histogram images from the analyzer are displayed.

Analyzer Flags

Displays the abnormal and suspect flags from the analyzer.

Instrument Results Display

Analyzer results display in this section.

Manual Results Area

Manually entered or CellaVision results display here. (Diff, Morph, and Fluid Counts)

Operator Alerts

Your specific operating procedures for this sample. Customizable messages.

Sample List

Contains all samples in this workflow.

Sample ID List

Sample ID (SID) List Order of Display

STAT
Critical and Time Limit
Critical
Time Limit
STAT only

Registered and Unregistered		
Critical and Time Limit		
	Registered	
		Unregistered
Critical		
	Registered	
		Unregistered
Time Limit		
	Registered	
		Unregistered
Registered only		
Unregistered only		

Time Limit

Yellow box

STAT

Red background with white letters

Critical

Bold red C

Record Lock

Lock icon

Registered

White background, no highlighting

Unregistered

White letters, blue background

Sample ID List ⊙

36 items

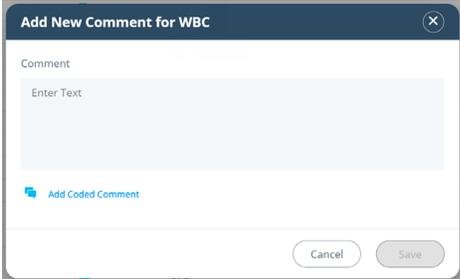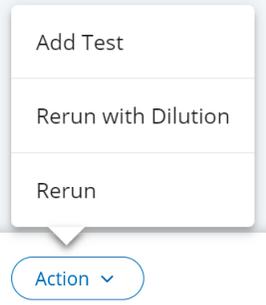| C | S12345678901 | 🔒 |
C	S12345678902	🔒
	S12345678903	🔒
	S12345678904	🔒
C	S12345678537	
C	S12345678321	🔒
	S12345678321	🔒
	S12345678321	🔒
	S12345678537	
	S12345678537	
	S12345678537	
	S12345678537	
	S12345678537	
	S12345678537	
	S12345678537	
	S12345678537	
	S12345678541	

Sample Age

Within each of the above groups, samples are arranged with the oldest sample at the top per the collection date and time.
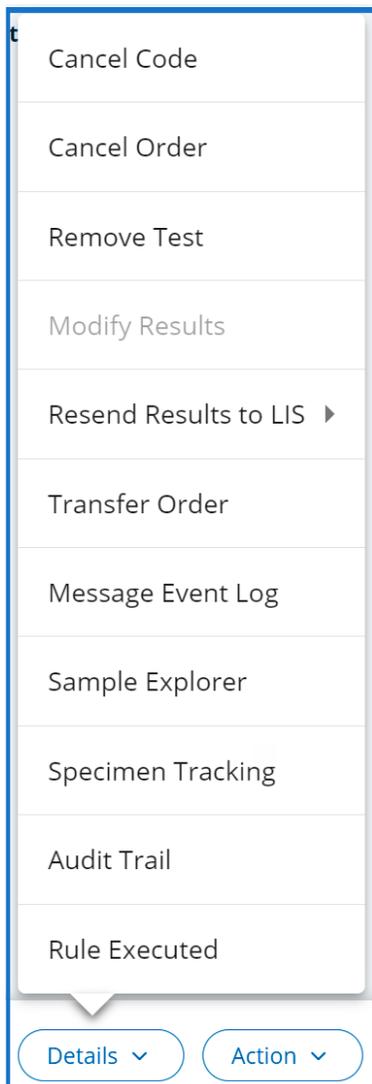
When the collection date and time are not available, the receipt date and time are used.

Result Validation Workflow

Result Validation screen workflow with the sample list

	1. Select the sample ID from the sample list.
	2. Review the OP Alerts and follow instructions.
Rerun ⇄	3. If indicated, select a run from the Rerun module by clicking the arrows.
Result •••	4. If indicated, click on a result line to modify a result, or click on the ellipse to add a coded result.
Add New Comment for WBC ⊗ Comment Enter Text Add Coded Comment Cancel Save **Comment** 💬	5. If indicated, add a comment by clicking the comment icon in the result line of the test code.
Add Test Rerun with Dilution Rerun Action ⌄	6. To add a test, or order a rerun, use the Actions menu. **Action drop-down:** • **Add Test** allows the user to add test profiles to an existing order. • **Rerun with Dilution** enables user to order a rerun and specify the dilution factor. • **Rerun** allows the user to rerun selected tests (all tests will be rerun if no tests are selected).
Save	7. Click [Save].
📋 Validate CBC 📋 Validate Sel 📋 Validate All	8. Click a validation action. **Validation actions:** • **Validate CBC** validates the hemogram and leaves the automated differential pending for slide review. • **Validate All** validates all resulted test codes. • **Validate Sel** provides the option to select individual tests to validate using the checkboxes to the left of the test codes.
	9. Continue through the sample list.

More Order, Sample, and Result Options

Details drop-down

Cancel Code

Cancel Order

Remove Test

Modify Results

Resend Results to LIS ▶

Transfer Order

Message Event Log

Sample Explorer

Specimen Tracking

Audit Trail

Rule Executed

Details ⌄   Action ⌄

NOTE: Options available are based on user profile

Cancel Code allows for each parameter to be resulted with a specific comment and **sent to the LIS.**

Cancel Order cancels the entire sample ID and adds the cancel test code. **No results sent to LIS.**

Remove Test allows for removal of selected test(s) from the order.

Modify Results allows for validated results to be modified and sent to the LIS.
  NOTE: Not all LIS are able to receive modified results from Caresphere WS.

Resend Results to LIS re-transmits results to the LIS.
  NOTE: The Force Results option will transmit "#FORCE" as the result for any pending test codes on the sample.

Transfer Order allows the order to be transfered to another site location within Caresphere WS. Updated location is not transmitted to the LIS.

Message Event Log opens the Message Event Log from the System Monitoring page for the selected sample ID.

Sample Explorer opens a new browser tab with the Sample Explorer screen for the current sample.

Specimen Tracking provides locations and timestamps for all barcode scans within the system.

Audit Trail logs and displays all actions and results.

Rules Executed displays the rules that have triggered for the sample.

Mark a sample for manual review

1. Place a mark in the Manual review checkbox.

2. Click [Save].

The entire sample ID will be removed from the **To Validate** workflow and will be present in the **Manual Review** workflow.

Reruns

Selecting which set of results to report

1. When a rerun is ordered manually or through the user-defined rules, the test results and associated information are moved into the RUN # field of the rerun screen.

Test	Result		Comment	Rerun ⇄
WBC	**1.78**	**...**	💬	1.99

2. Click the Rerun hyperlink on the Results Validation screen to open the Rerun table.

Rerun ⇄

3. Select all the tests by clicking on the select all checkbox, or select specific tests by using the individual check boxes.

NOTE: The empty box in the column header will select all the tests in that run.

	RUN 1	Analyzer ID: XN902		RUN 2	Analyzer ID:
☐	Data Mark	Result	☑	Data Mark	Result
☐		1.99	☑		**1.78**

4. Click OK to save and return to the Result Validation screen.

Manual Differential

Counting cells under the microscope

1. Click [Diff] under the Manual panel in the Result Validation screen.

Manual	
Diff	Morph	Fluid Count	
☐ Test	Result

2. MDIFF is the default counter. Manually change to the appropriate counter for use with a body fluid or CSF differential as needed.

   📑 Counter: MDIFF ▼

3. Perform manual differential by selecting the appropriate key for each respective cell type.

   - When count limit is reached, the counting stops. No additional cells are added.
   - The count limit default is 100 cells. If you need to count more than 100 cells edit this number before beginning to count.

     Count Limit: 100

   - If you stop counting before the count limit is reached, you will be alerted that less than the count limit number have been counted. If accepted, the results will be normalized and rounded correctly for the total number of cells counted.
   - In the event of a cell being misclassified, move the slider to [Subtract]. Remove the cell by selecting the respective key. When finished removing cell, move the slider back to [Add] and continue enumerating cell types.
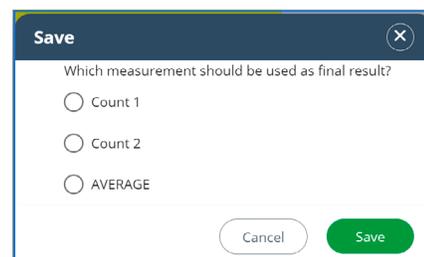
     (Add) Subtract

Test	Key
NEUT% M	a
LYMPH% M	s
MONO% M	1
EOS% M	6
BASO% M	5
BAND% M	.
META% M	4
MYELO% M	9
PROMY% M	8
BLAST% M	7
ATYP LY% M	+
PLASMA% M	-
OTHER% M	/
NRBC% M	0
Reactive Lymphocytes	P

4. Click [Save].
5. After completion, review the Result Validation screen for any Operator Alerts related to manual differential and absolute counts.

Performing a second count

- Additional counts can be completed by moving the slider to [Count 2].
- After completion, click [Save] and determine which results will be reported (Count 1, Count 2 or Average).

  Count 1 (Count 2)

Save	⊗
Which measurement should be used as final result?	
○ Count 1	
○ Count 2	
○ AVERAGE	
(Cancel)	(Save)

Morphology

Reporting and grading of abnormal red blood cell morphology

1. Click Morph under the Manual panel in the Result Validation screen.

   Manual

   Diff | **Morph** | **Fluid Count**

☐ Test	Result
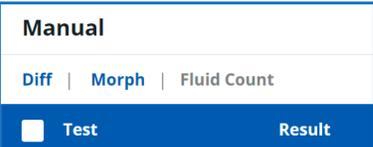
2. MORPH is the default counter. Use the dropdown to select morphology for other morphology options.

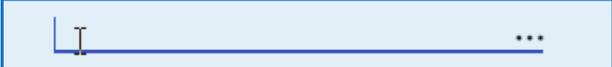   Counter: MORPH ▼

3. Grade morphology using one of two methods:
   a. Click the ellipsis to display a pop-up window with coded results.

   Result

   ...

   b. Click in the blank space to display a cursor and type the code manually.Enter your password and click Log in.

   ...

4. Repeat for additional morphologies.
5. Click [Save].
6. After completion, review the Result Validation screen for any Operator Alerts related to morphology and perform final review of results.

   OP Alerts   7 Items

   Blast(s) Present (Blasts% M >0) -
   Send for Path Review.   2

   Schistocytes 3+ - Send for Path
   Review.   2

   Parasites Present - Send for Path
   Review.   2

Previous Results

Viewing previous results for a specific Medical Record Number (MRN)

1. If previous results are present for a sample ID, the most recent set of previous results will be displayed on the Result Validation screen.
2. Click the Prev Res hyperlink to open the Previous Results popup.

Prev Res ⤆

3. The list is sorted in reverse chronological order. The most recent previous result is considered as Prev Res 1.
4. The sample ID is displayed as a hyperlink if any test code result for the sample has a Critical. If the hyperlink is clicked, user will be navigated to the Result Validation screen for that sample.

☐	Test	Result	Comment	Rerun ⇄	Prev Res ⤆	Prev Com
☐	WBC	5.88	3 💬	5.88	5.88	3 💬
☐	NRBC Auto %	4.0	💬			
☐	NRBC Auto #	5.30	💬			

Previous Results

Sample ID	MRN	Name	DOB
9966890332	MR281159	TEST, CRINLBCRITICAL3	07/20/

	Current	Prev Res 1
Sample ID	9966890332	9966281159
Collection d/t	07/22/2023 14:04:41	07/21/2023 14:04:41
WBC	1.49	**1.99**
NRBC Auto %	0.1	0.1
NRBC Auto #	0.59	0.59

Fluid Count

Counting Total Nucleated Cells (TNC) and Red Blood Cells (RBC) in body fluids under the microscope

1. Click [Fluid Count] under the Manual panel in the Result Validation screen.
2. Select [Side 1] or [Side 2], depending on which side of the hemocytometer you are counting.
3. Start counting TNC and RBC by selecting the appropriate key for each respective cell type.
   - In the event of a cell being misclassified, select [Subtract]. Remove the cell by selecting the respective key. When finished removing cell, select [Add] and continue enumerating cell types.
4. On the left side, complete the following:
   - Average Number of Squares Counted for TNC entered as an AVERAGE when counting both sides of the Hemocytometer
     - Ex: If 18 large squares are counted across both sides of the Hemocytometer the entry would be 9.
   - Average number of Squares Counted for RBC.
     - Ex: If 50 small squares are counted across both sides of the Hemocytometer the entry would be 25.

   NOTE: Same number of squares should be counted on each side.

TNC Squares Counted:	9
TNC Dilution Factor:	1
RBC Squares Counted:	9
RBC Dilution Factor:	1
RBC Calculation:	Large Sq

Add   Subtract   Side 1   Side 2

5. Click the [Calculate] button on the bottom right side of the screen to calculate the following results based on pre-defined calculation formulas:
   - The TNC Average of Sides, TNC Manual Count, TNC Difference of Sides.
   - The RBC Average of Sides, RBC Manual Count, RBC Difference of Sides.

[Calculate]   (Clear)   (Save)

6. Click the [Save] button to save the results to the Result Validation screen.
7. After completion, review the Result Validation screen for any Operator Alerts related to manual counts.
8. If needed, perform a fluid differential by selecting [Diff] from the manual area of the Result Validation screen.

Manual

Diff | **Morph** | **Fluid Count**

Smear Status

Check whether slides have been made and stained

1. Select [SMEAR status] icon from the bottom of the Homepage Dashboard.

SMEAR status

2. Select [Result Type Show Latest], or [Show All].
3. Select one or more filters if needed:
   - Sample ID
   - Smear Status
4. Click [Apply].
5. Review the status of the smear.

Yellow	In Process
White	Pending
Green	Completed
Blue	M-Complete
Red	Error

Filter Criteria	Result Type ○ Show Latest ● Show All		Sample ID Enter Text	Smear Status Select Value ▼				Clear	Apply
⊘ Manually Complete								🗐 Export	🖶 Print

☐	Sample ID	Collection d/t	SP Query d/t	Instrument ID	Rack ID	Position	SMEAR Status	Status Update
☐	9953970614	07/21/2023 10:29:31					PENDING	12/27/2023 14:36:32
☐	OD201101	11/20/2023 15:42:25	11/20/2023 02:43:56	⦿ SP102011	000001	01	IN-PROCESS	11/20/2023 02:43:57
☐	5514	03/31/2021 14:05:38	03/31/2021 14:43:55	⦿ SP10	200033	01	ERROR	03/31/2021 14:45:16
☐	OD280605	06/28/2023 14:57:01	06/28/2023 03:21:27	⦿ SP1028JUN	000001	01	COMPLETED	06/28/2023 03:21:28
☐	9973846620	07/26/2022 07:17:28					M-COMPLETED	06/28/2023 16:34:30

If you completed the SMEAR manually (without slide maker/stainer)

1. On SMEAR Status screen, select one record with status as In-Process / Pending / Error by marking checkbox in Sel column.
2. Click on the Manually Complete button.
   - The system changes SMEAR status to M-Completed.

⊘ Manually Complete	
Sample ID	**Collection d/t**
☑ 9953970614	07/21/2023 10:29:31

Specimen Tracking

Finding a sample in your laboratory

Specimen Tracking records the location of a sample each time the barcode is read at a Sysmex analyzer.. Specimen Tracking is used to search, filter, and print all locations of a specimen. You can search by Sample ID, date/time range, rack ID, and instrument ID and sort the information for printing.

1. Select [Specimen Tracking] icon from the Homepage Dashboard.

Specimen Tracking

2. Enter a sample ID.

   NOTE: Once three characters are entered, a dynamic search is performed. Continue entering characters until the sample ID can be selected from the list.

3. Click [Apply].
4. Review the Sample ID tracking history.

	Sample ID	MRN	Name	Instrument ID	Rack ID	Position	Tray	Comment	Created d/t
☐	OD280605			● SP1028JUN	000001	01	SP10	🗐	06/28/2023 03:21:27
☐	OD280605			● XN28JUN	1	1	XN	🗐	06/28/2023 03:21:25
☐	OD280605			● CT9028JUN	1	01	BT	🗐	06/28/2023 03:21:14
☐	OD280605			● CT9028JUN	1	01	BT	🗐	06/28/2023 03:21:10
☐	OD280605							🗐	06/28/2023 03:21:02

- Columns are able to be sorted by clicking on the header.

   Instrument ID ↑

- The list can be printed.

   🖶 Print

Specimen Tracking is also accessible through the Result Validation screen via the Details menu.
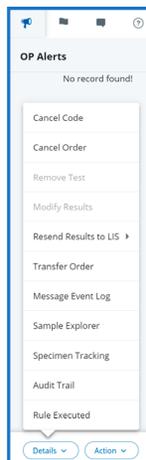
Sample Explorer & Barcode Errors

Sample Explorer

The Sample Explorer screen allows users to perform specific searches based on all available criteria.

1. Enter the search criteria.

Barcode Error Management

Barcode read errors should be handled according to your laboratory operating procedures. The Barcode Error screen can help you identify the analyzer, rack, and tube location of the sample.

1. Select the Barcode Error icon from the footer menu on the homepage.
   - The past 24 hours is the default search criteria.

Barcode Error

2. Click [Apply].

NOTE: Configured in General Parameters. Check with your System Administrator.

Offline Mode

If you are in a downtime, follow your laboratory's downtime procedures. Refer to the Caresphere Workflow Solutions User Manual for Offline Mode operation.